

## CHARACTERISTICS OF TRAVELERS FROM THE UNITED KINGDOM TO CALIFORNIA

The UK was California's largest overseas market with approximately 818,000 visitors to California in 2008. Collectively, visitors from the UK spent approximately \$865 million in California.

UK visitors to California during 2008 reported spending \$123 per day during an 8.6 night average stay or approximately \$1,058 per visitor. The average spending for all overseas visitors to California was about \$1,353 (\$123 per day; 11.0 nights in California).

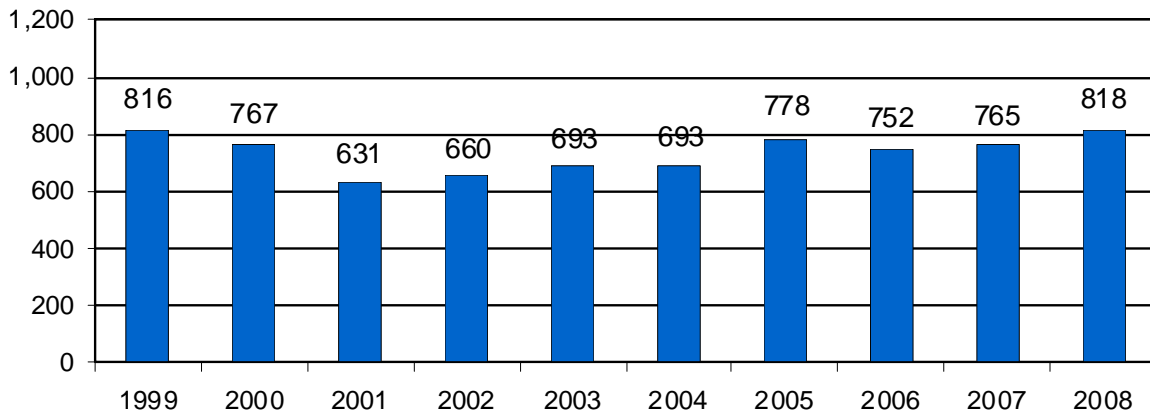
### Visitors From the United Kingdom

Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
1998	3,974,976	21.2%	843,000
1999	4,252,160	19.2%	816,000
2000	4,703,008	16.3%	767,000
2001	4,097,258	15.4%	631,000
2002	3,816,736	17.3%	660,000
2003	3,936,112	17.6%	693,000
2004	4,302,737	16.1%	693,000
2005	4,344,957	17.9%	778,000
2006	4,176,211	18.0%	752,000
2007	4,497,858	17.0%	765,000
2008	4,564,895	17.9%	818,000

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 the U.K. to CA, 1999-2008 (in 000s)



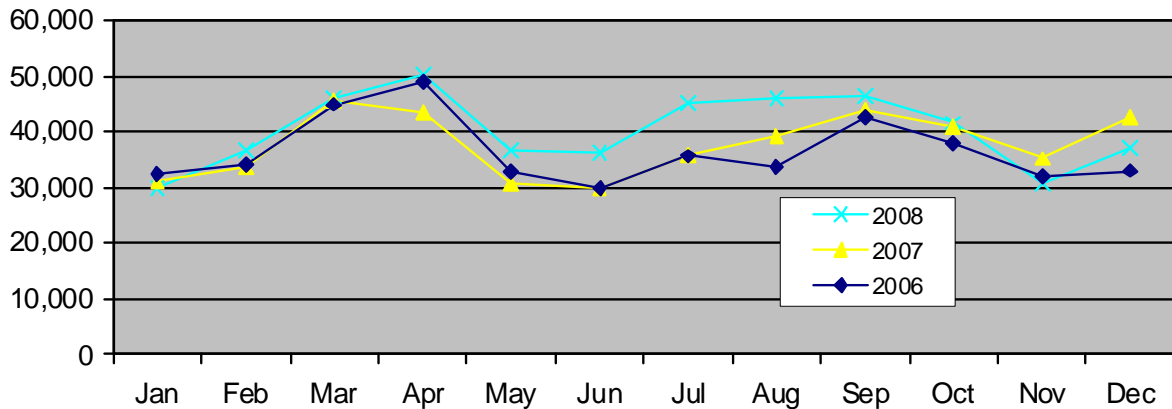
Source: International Trade Administration, Office of Travel and Tourism Industries.

In 2002 the UK passed Japan to become the largest origin market for overseas visitors to California. The UK was ranked the number one overseas market to California each year since 2002, but has still not recovered to the 1998 peak of 843,000 visitors to the state.

### UK Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from the UK to California were generally consistent in 2008 compared with 2006 and 2007. However, an increase in California port-of-entry volume from the UK occurred in the summer months of 2008. In general, UK residents arriving at California ports-of-entry peaked in April. The lowest volumes were recorded in January and November.

**Residents of the U.K.  
Monthly Port of Entry Arrivals to CA  
2006-2008**



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

## Comparisons with Overseas Visitors

Detailed trip and traveler characteristics of visitors from the UK 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 the UK are more likely to:

- Travel to California for leisure/recreation/holiday purposes
- Make use of a personal computer as a trip planning aid and means of booking their air trip
- Have a decidedly longer trip planning and advance airline booking horizon
- Mention the schedule as well as previous good experience as a main factor in selecting an airline
- Make use of a travel package
- Travel with a spouse
- Stay less time in the U.S.
- Visit San Francisco, Las Vegas and Yosemite as part of their trip
- Dine out, visit historical places, small towns, national parks, tour the countryside, and go on guided tours while in the U.S.
- Have a higher average annual household income
- Spend less per visitor per trip

Conversely, visitors from the UK are less likely to:

- Travel to California for business purposes
- Make use of a travel agency as a trip planning aid and means of booking their air trip
- Be on their first trip to the U.S.
- Visit Los Angeles or New York City as part of their trip
- Visit amusement/theme parks while in the U.S.
- Use credit cards to pay for trip expenses

## Characteristics of Travelers from The United Kingdom to California, 2008

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from the UK (n = 996)	Leisure Visitors from the UK (n = 660)
<b>Primary Purpose of Trip</b>			
Leisure/Recreation/Holidays	43%	54%	74%
Visit Friends/Relatives	19	19	26%
Business/Professional	27	21	-
Convention/Conference	7	5	-
Other Purpose	5	2	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Leisure/Recreation/Holidays	63%	73%	90%
Visit Friends/Relatives	37	33	38
Business/Professional	31	24	2
Convention/Conference	11	7	0
<b>Sources Used to Plan Trip**</b>			
Airlines Directly	21%	25%	26%
Corporate Travel Department	11	10	0
Personal Computer	42	49	52
Friends/Relatives	16	13	16
Newspapers/Magazines	3	3	4
State/City Travel Office	4	1	1
Tour Company	6	10	13
Travel Agency	43	33	35
Travel Guides	10	10	13
<b>Advance Planning for Trip</b>			
7 days or less	9%	7%	3%
8 - 30 days	30	19	13
31 - 60 days	19	20	20
61 - 90 days	13	15	18
More than 3 Months	30	39	47
Total	100%	100%	100%
Average Planning Time in Days	92	114	139
<b>Advance Airline Reservations</b>			
7 days or less	16%	14%	6%
8 - 30 days	38	25	19
31 - 60 days	17	21	22
61 - 90 days	10	12	15
91 - 120 days	5	6	7
121 - 180 days	8	11	14
6 Months or More	6	12	17
Total	100%	100%	100%
Average Booking in Days	60	84	105

\* 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 the United Kingdom to California  
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from the UK (n = 996)	Leisure Visitors from the UK (n = 660)
<b>Means of Booking Air Trip</b>			
Airlines Directly	12%	14%	14%
Corporate Travel Department	11	11	1
Personal Computer	22	33	37
Travel Agent	48	32	35
Travel Club	1	1	1
Tour Operator	4	7	10
Other/Don't Know	3	3	2
Total	100%	100%	100%
<b>Main Factor in Selecting Airline</b>			
Airfare	24%	24%	30%
Schedule	15	20	14
Non-Stop Flight	13	14	13
Mileage Bonus/Frequent Flyer Program	12	9	12
Previous Good Experience	10	16	10
Safety Reputation	7	1	8
Airline Loyalty	4	3	4
In-flight Service	5	5	4
Employer policy	4	3	0
Other	6	6	6
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	77%	75%	81%
Executive/Business	20	21	16
First Class	3	5	3
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	11%	17%	23%
No	89	83	77
Total	100%	100%	100%
<b>Advance Package Booking</b>			
7 days or less	4%	0%	0%
8 - 30 days	26	8	7
31 - 60 days	23	28	29
61 - 90 days	12	9	10
91 - 120 days	5	5	5
121 - 180 days	17	27	25
6 Months or More	14	24	26
Total	100%	100%	100%

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**Characteristics of Travelers from the United Kingdom to California  
(2008 - cont.)**

<b>Trip &amp; Traveler Characteristics</b>	<b>All Overseas Visitors* (n = 7,780)</b>	<b>All Visitors from the UK (n = 996)</b>	<b>Leisure Visitors from the UK (n = 660)</b>
<b>Travel Companions**</b>			
Business Associates	10%	6%	1%
Family/Relatives	23	21	27
Friends	12	12	15
Spouse	27	40	51
Tour Group	2	0	0
Traveling Alone	39	34	24
<b>Average Travel Party Size</b>	1.5	1.6	1.8
<b>Median Travel Party Size</b>	1.0	1.0	2.0
<b>Type of Lodging**</b>			
Hotel / Motel	78%	82%	80%
Private Home	28	22	24
Other	4	3	3
<b>Length of Stay</b>			
Mean Nights in the U.S.	21.2	15.7	15.5
Mean Nights in California	11.0	8.6	7.9
% of California Nights	52%	55%	51%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	24%	11%	14%
Average Trips to the U.S. in Past Year	2.0	2.3	1.7
Average Trips to the U.S. in Past 5 Years	6.3	7.6	4.9
<b>Average Number of States Visited</b>	2.0	1.9	2.1
<b>Average Number of Destinations Visited</b>	2.9	3.0	3.4
<b>Places Visited in the U.S.**</b>			
Los Angeles	53%	44%	46%
San Francisco	49	58	64
Las Vegas	28	33	42
New York City	17	9	9
San Diego	13	10	10
San Jose	7	4	1
Anaheim-Santa Ana	7	6	6
Yosemite	5	12	16
Grand Canyon	4	4	6
Chicago	4	3	3
DC Metro Area	4	2	2
Monterey-Salinas	4	7	9
Seattle	3	2	1
Sacramento	3	3	3
Riverside/San Bernardino	3	6	8
Santa Barbara	3	4	5
Oakland	3	5	4

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**Characteristics of Travelers from the United Kingdom to California  
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from the UK (n = 996)	Leisure Visitors from the UK (n = 660)
<b>Activities Experienced While in the U.S.**</b>			
Dining Out	87%	96%	96%
Shopping	85	87	92
Sightseeing in Cities	53	58	68
Historical Places	44	52	63
Visiting Small Towns	36	44	55
National Parks	35	44	56
Amusement/Theme Parks	34	26	33
Touring Countryside	30	40	51
Cultural Heritage Sites	28	31	37
Casinos/Gambling	24	23	28
Art Gallery/Museum	23	21	25
Guided Tours	22	32	38
<b>Transportation While in the U.S.**</b>			
Taxi/Limousine	42%	50%	46%
Rented Auto	40	43	46
Airlines in U.S.	36	27	28
Company or Private Auto	28	24	26
City Subway/Tram/Bus	26	30	33
Railroad between Cities	11	8	7
Bus between Cities	9	7	8
Motor Home/Camper	2	4	5
<b>Visitor Spending in the U.S.</b>			
Per Travel Party Per Trip (U.S.)	\$3,998	\$3,119	\$3,066
Per Visitor/Trip (U.S.)	2,607	1,920	1694
Per Visitor Per Day	123	123	109
Per Visitor/Trip (California)	\$1,353	\$1,058	\$861
<b>Spending by Category (Per Visitor/Trip)</b>			
Lodging	\$800	\$687	\$471
Food/Beverages	526	414	415
Gifts/Souvenirs	450	225	230
Transportation in the U.S.	425	283	228
Entertainment	234	207	233
Expenses at the Airport	37	26	28
Other	135	77	90
<b>Total Spending Per Visitor/Trip</b>	<b>\$2,607</b>	<b>\$1,920</b>	<b>\$1,694</b>

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<b>Payment Method for Trip Expenses</b>			
Credit Cards	53%	47%	39%
Cash	37	37	41
Debit Cards	6	11	12
Travelers Checks	3	6	8
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	41	44	43
Average Age - Females	38	43	40
<b>Occupation</b>			
Manager/Executive	34%	31%	23%
Professional/Technical	32	33	32
Student	8	6	7
Clerical/Sales	7	5	6
Retired	6	13	16
Other	13	13	17
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	6%	3%	4%
\$20,000 - \$39,999	10	7	10
\$40,000 - \$59,999	13	9	10
\$60,000 - \$79,999	11	11	12
\$80,000 - \$99,999	11	10	11
\$100,000 - \$119,999	11	12	14
\$120,000 - \$139,999	7	8	8
\$140,000 - \$159,999	6	6	6
\$160,000 - \$179,999	4	5	5
\$180,000 - \$199,999	3	4	2
\$200,000 and over	18	27	20
Total	100%	100%	100%
Average Annual Income	\$107,200	\$126,700	\$113,400

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