

CHARACTERISTICS OF TRAVELERS FROM THE UNITED KINGDOM TO CALIFORNIA - 2010

The UK was California's largest overseas market with approximately 682,000 visitors to California in 2010. Collectively, visitors from the UK spent approximately \$731 million in California.

UK visitors to California during 2010 reported spending \$103 per day during a 10.4 night average stay or approximately \$1,071 per visitor. The average spending for all overseas visitors to California was about \$1,209 (\$107 per day; 11.3 nights in California).

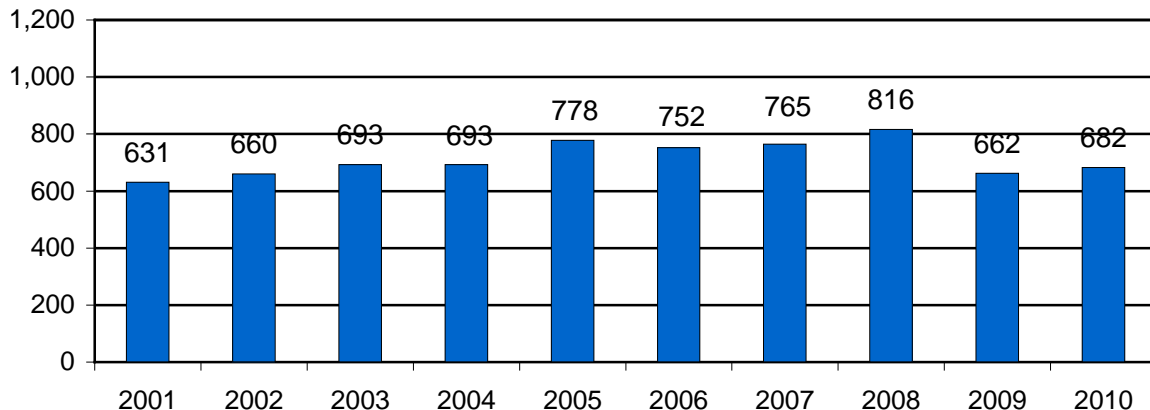
Visitors From the United Kingdom

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
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%	816,000
2009	3,899,167	17.0%	662,000
2010	3,850,864	17.7%	682,000

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, 2001-2010 (in 000s)



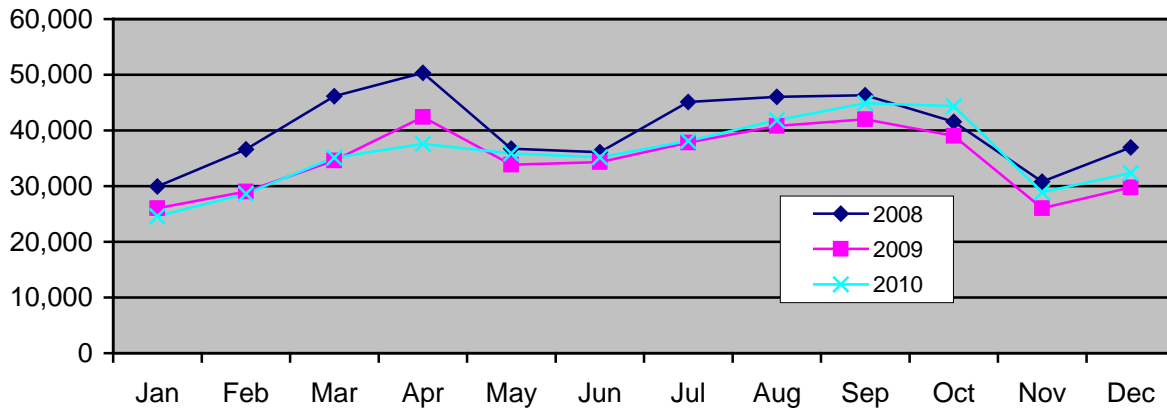
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 2010 compared with 2008 and 2009. In general, UK residents arriving at California ports-of-entry peaked in April and October. The lowest volumes were recorded in January and November.

**Residents of the U.K.
Monthly Port of Entry Arrivals to CA
2008-2010**



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
- Plan and book their air trip via a personal computer
- Have a decidedly longer trip planning and advance airline booking horizon
- Travel with a spouse
- Stay less time in the U.S.
- Dine out, go sightseeing in cities, visit historical places, visit small towns, go to cultural heritage sites, and tour the countryside while in the U.S.
- Be retired

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
- Spend their money in the U.S. on gifts or souvenirs
- Use credit cards to pay for trip expenses

**Characteristics of Travelers from
The United Kingdom to California, 2010**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from the UK (n = 813)	Leisure Visitors from the UK (n = 639)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	48%	57%	68%
Visit Friends/Relatives	22%	27%	32%
Business/Professional	21%	13%	-
Convention/Conference	5%	2%	-
Other Purpose	5%	2%	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	67%	75%	85%
Visit Friends/Relatives	39%	41%	44%
Business/Professional	24%	15%	1%
Convention/Conference	9%	5%	1%
Sources Used to Plan Trip**			
Personal Computer	44%	53%	57%
Travel Agency	40%	31%	32%
Airlines Directly	23%	27%	26%
Friends/Relatives	17%	18%	20%
Travel Guides	10%	12%	14%
Corporate Travel Department	8%	5%	1%
Tour Company	5%	7%	8%
State/City Travel Office	4%	2%	2%
Newspapers/Magazines	3%	2%	3%
Advance Planning for Trip			
7 days or less	6%	5%	3%
8 - 30 days	28%	20%	16%
31 - 60 days	20%	15%	13%
61 - 90 days	12%	12%	13%
More than 3 Months	34%	50%	56%
Total	100%	100%	100%
Average Planning Time in Days	98 days	129 days	145 days
Advance Airline Reservations			
7 days or less	12%	7%	5%
8 - 30 days	38%	25%	19%
31 - 60 days	17%	15%	16%
61 - 90 days	10%	12%	13%
91 - 120 days	7%	10%	12%
121 - 180 days	10%	13%	15%
6 Months or More	7%	18%	21%
Total	100%	100%	100%
Average Booking in Days	68 days	103 days	117 days

* 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
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from the UK (n = 813)	Leisure Visitors from the UK (n = 639)
Means of Booking Air Trip			
Travel Agent	46%	30%	31%
Personal Computer	26%	38%	41%
Airlines Directly	13%	19%	19%
Corporate Travel Department	8%	7%	2%
Tour Operator	4%	5%	6%
Travel Club	1%	1%	1%
Other/Don't Know	2%	1%	1%
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	29%	29%	30%
Schedule	14%	15%	14%
Non-Stop Flight	14%	14%	14%
Mileage Bonus/Frequent Flyer Program	10%	10%	10%
Previous Good Experience	9%	16%	18%
Safety Reputation	8%	2%	2%
Airline Loyalty	4%	4%	3%
In-flight Service	4%	2%	2%
Employer policy	3%	1%	-
Other	6%	6%	6%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	84%	81%	86%
Executive/Business	15%	17%	13%
First Class	2%	2%	2%
Total	100%	100%	100%
Use of Package			
Yes	14%	17%	21%
No	86%	83%	79%
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	1%	-
8 - 30 days	27%	11%	9%
31 - 60 days	15%	11%	12%
61 - 90 days	10%	9%	9%
91 - 120 days	11%	11%	12%
121 - 180 days	20%	19%	20%
6 Months or More	14%	39%	38%
Total	100%	100%	100%

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**Characteristics of Travelers from the United Kingdom to California
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from the UK (n = 813)	Leisure Visitors from the UK (n = 639)
Travel Companions**			
Traveling Alone	39%	32%	23%
Spouse	27%	44%	52%
Family/Relatives	25%	24%	28%
Friends	11%	13%	14%
Business Associates	8%	3%	-
Tour Group	2%	1%	1%
Average Travel Party Size	1.6	1.7	1.8
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	78%	78%	76%
Private Home	29%	29%	31%
Other	4%	5%	5%
Length of Stay			
Mean Nights in the U.S.	22.8 nights	17.3 nights	16.7 nights
Mean Nights in California	11.3 nights	10.4 nights	10.3 nights
% of California Nights	50%	60%	62%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	27%	15%	16%
Average Trips to the U.S. in Past Year	1.8 trips	1.7 trips	1.5 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	5.2 trips	4.3 trips
Average Number of States Visited	2.1 states	1.9 states	2.0 states
Average Number of Destinations Visited	3.0 dest.	3.1 dest.	3.4 dest.
Places Visited in the U.S.**			
Los Angeles	60%	55%	57%
San Francisco	47%	46%	47%
Las Vegas	29%	32%	37%
New York City	16%	10%	10%
San Diego	14%	17%	18%
Flagstaff	8%	5%	7%
Anaheim-Santa Ana	7%	7%	8%
Grand Canyon	5%	4%	5%
San Jose	5%	5%	3%
DC Metro Area	5%	2%	2%
Yosemite	4%	7%	9%
Chicago	4%	5%	5%
Monterey-Salinas	4%	7%	9%
Miami	4%	1%	1%
Riverside/San Bernardino	4%	8%	9%
Seattle	3%	2%	2%
Sacramento	3%	3%	4%

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**Characteristics of Travelers from the United Kingdom to California
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from the UK (n = 813)	Leisure Visitors from the UK (n = 639)
Activities Experienced While in the U.S.**			
Shopping	88%	87%	90%
Dining Out	85%	95%	95%
Sightseeing in Cities	57%	65%	71%
Historical Places	47%	55%	60%
Amusement/Theme Parks	40%	35%	39%
National Parks	38%	44%	50%
Visiting Small Towns	38%	46%	52%
Cultural Heritage Sites	31%	39%	43%
Touring Countryside	31%	43%	48%
Art Gallery/Museum	26%	31%	31%
Casinos/Gambling	25%	27%	30%
Guided Tours	23%	29%	32%
Transportation While in the U.S.**			
Rented Auto	41%	42%	46%
Taxi/Limousine	39%	43%	42%
Airlines in U.S.	37%	32%	32%
Company or Private Auto	28%	27%	28%
City Subway/Tram/Bus	25%	27%	28%
Railroad between Cities	12%	9%	9%
Bus between Cities	10%	8%	9%
Motor Home/Camper	2%	2%	2%
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,797	\$2,937	\$2,854
Per Visitor/Trip (U.S.)	\$2,435	\$1,778	\$1,570
Per Visitor Per Day	\$107	\$103	\$94
Per Visitor/Trip (California)	\$1,209	\$1,071	\$968
Spending by Category (Per Visitor/Trip)			
Lodging	\$661	\$481	\$384
Food/Beverages	\$514	\$462	\$441
Gifts/Souvenirs	\$421	\$196	\$196
Transportation in the U.S.	\$384	\$274	\$217
Entertainment	\$243	\$249	\$246
Expenses at the Airport	\$34	\$26	\$25
Other	\$179	\$90	\$60
Total Spending Per Visitor/Trip	\$2,435	\$1,778	\$1,570

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(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from the UK (n = 813)	Leisure Visitors from the UK (n = 639)
Payment Method for Trip Expenses			
Credit Cards	52%	43%	39%
Cash	39%	42%	45%
Debit Cards	7%	12%	12%
Travelers Checks	1%	3%	4%
Total	100%	100%	100%
Age			
Average Age - Males	43 years	46 years	47 years
Average Age - Females	40 years	44 years	46 years
Occupation			
Professional/Technical	33%	32%	29%
Manager/Executive	29%	22%	19%
Student	10%	7%	6%
Retired	9%	21%	25%
Clerical/Sales	8%	7%	9%
Other	12%	12%	13%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	8%	4%	4%
\$20,000 - \$39,999	13%	11%	14%
\$40,000 - \$59,999	14%	17%	18%
\$60,000 - \$79,999	13%	15%	17%
\$80,000 - \$99,999	11%	12%	12%
\$100,000 - \$119,999	11%	8%	8%
\$120,000 - \$139,999	7%	6%	5%
\$140,000 - \$159,999	6%	5%	4%
\$160,000 - \$179,999	3%	5%	5%
\$180,000 - \$199,999	3%	3%	2%
\$200,000 and over	13%	15%	13%
Total	100%	100%	100%
Average Annual Income	\$96,200	\$102,500	\$95,500

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