

## CHARACTERISTICS OF TRAVELERS FROM THE UNITED KINGDOM TO CALIFORNIA - 2013

The UK was California's second largest overseas market with approximately 652,000 visitors to California in 2013. Collectively, visitors from the UK spent approximately \$867 million in California.

UK visitors to California during 2013 reported spending \$129 per day during a 10.3 night average stay or approximately \$1,329 per visitor. The average spending for all overseas visitors to California was about \$1,940 (\$159 per day; 12.2 nights in California).

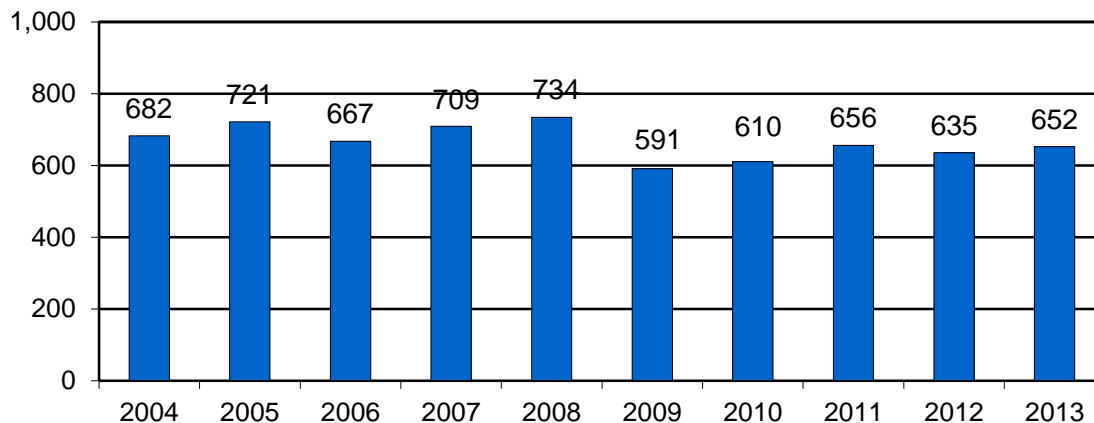
### Visitors From the United Kingdom

Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
2003	3,936,112	17.4%	685,000
2004	4,302,737	15.9%	682,000
2005	4,344,957	16.6%	721,000
2006	4,176,211	16.0%	667,000
2007	4,497,858	15.8%	709,000
2008	4,564,895	16.1%	734,000
2009	3,899,167	15.2%	591,000
2010	3,850,864	15.8%	610,000
2011	3,835,300	17.1%	656,000
2012	3,763,381	16.9%	635,000
2013	3,835,308	17.0%	652,000

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 the U.K. to CA, 2004-2013 (in 000s)



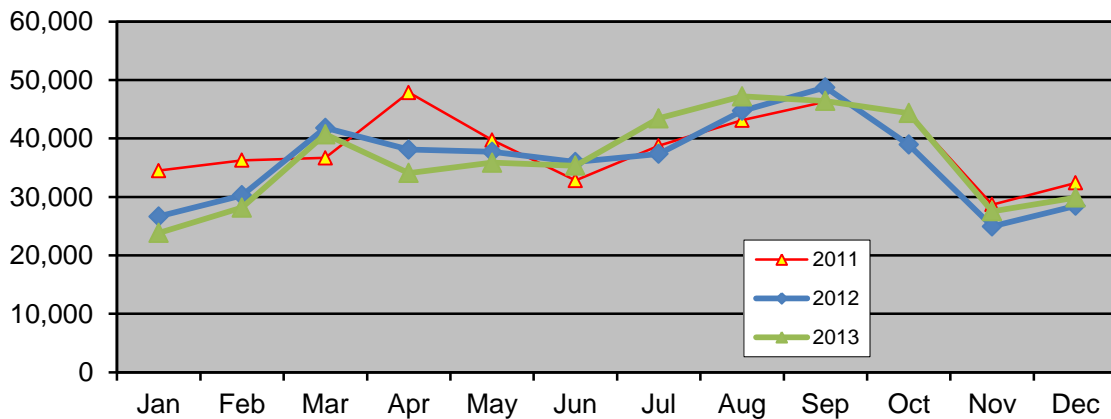
Source: U.S. Dept. of Commerce, National Travel and Tourism Office.

In 2012 the People’s Republic of China passed the UK and Japan to become the largest origin market for overseas visitors to California. The UK had been ranked the number one overseas market to California each year from 2002 to 2011, 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 2013 compared with 2011 and 2012. In general, UK residents arriving at California ports-of-entry peaked in March and August. The lowest volumes were recorded in January and November.

**Residents of the U.K.  
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 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:

- Plan and book their air trip directly with the airline
- Have a decidedly longer trip planning and advance airline booking horizon
- Sit in premium economy class
- Stay less time in the U.S.
- Visit small towns or the countryside and go on guided tours while in the U.S.
- Spend their travel dollars on accommodation as well as on food/beverages
- Have a higher annual household income

Conversely, visitors from the UK are less likely to:

- Book their air trip via a travel agency office
- Sit in economy/tourist/coach
- Be on their first trip to the U.S.
- Visit New York City as part of their trip
- Use air travel for transportation between U.S. cities
- Spend their travel dollars in the U.S. as well as in California
- Spend their travel dollars on air transportation and on gifts or souvenirs

**Characteristics of Travelers from  
The United Kingdom to California, 2013**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from the UK (n = 591)	Leisure Visitors from the UK (n = 396)
<b>Primary Purpose of Trip</b>			
Vacation/Holidays	52%	57%	78%
Visit Friends/Relatives	17%	16%	22%
Business	15%	18%	-
Convention/Conference	9%	6%	-
Other Purpose	8%	3%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Vacation/Holidays	64%	68%	86%
Visit Friends/Relatives	32%	34%	39%
Business	20%	20%	<1%
Convention/Conference	12%	8%	1%
<b>Sources Used to Plan Trip**</b>			
Airline	43%	56%	60%
Online Travel Agency	31%	30%	34%
Travel Agency Office	26%	17%	19%
Personal Recommendation	26%	23%	25%
Travel Guide	15%	17%	21%
Corporate Travel Department	14%	15%	3%
Tour Operator/Travel Club	9%	12%	15%
National/State/City Travel Office	8%	7%	7%
<b>Advance Planning for Trip</b>			
7 days or less	5%	7%	2%
8 - 30 days	27%	18%	12%
31 - 60 days	17%	15%	13%
61 - 90 days	14%	14%	13%
More than 3 Months	36%	46%	60%
Total	100%	100%	100%
Average Planning Time in Days	105 days	126 days	152 days
<b>Advance Airline Reservations</b>			
7 days or less	10%	11%	6%
8 - 30 days	35%	20%	13%
31 - 60 days	17%	16%	17%
61 - 90 days	13%	16%	15%
91 - 120 days	8%	11%	15%
121 - 180 days	9%	12%	17%
6 Months or More	7%	14%	18%
Total	100%	100%	100%
Average Booking in Days	72 days	97 days	119 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%.

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

**Characteristics of Travelers from the United Kingdom to California  
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from the UK (n = 591)	Leisure Visitors from the UK (n = 396)
<b>Means of Booking Air Trip**</b>			
Travel Agency Office	31%	17%	21%
Airlines Directly	28%	41%	46%
Internet Booking Service	24%	16%	19%
Corporate Travel Department	15%	17%	4%
Tour Operator/Travel Club	9%	13%	14%
Other	2%	2%	1%
<b>Main Factor in Selecting Airline</b>			
Airfare	29%	24%	28%
Non-Stop Flights	17%	16%	14%
Convenient Schedule	15%	17%	19%
Mileage Bonus/Frequent Flyer Program	9%	7%	6%
Previous Good Experience	9%	14%	14%
Safety Reputation	6%	2%	2%
Loyalty to Carrier	4%	5%	6%
Employer policy	3%	3%	2%
In-flight Service Reputation	3%	3%	4%
On-time Reputation	2%	1%	1%
Other	4%	8%	5%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	79%	66%	68%
Executive/Business	10%	10%	10%
Premium Economy	10%	22%	20%
First Class	1%	2%	2%
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	15%	14%	19%
No	85%	86%	81%
Total	100%	100%	100%
<b>Travel Package Includes**</b>			
Airfare and Accommodation Only	3%	4%	5%
Attractions/Events/Entertainment	7%	3%	4%
Bus/Coach	7%	4%	5%
Cruise	2%	3%	5%
Guided Tours	6%	3%	5%
Meals	6%	2%	3%
Recreation	1%	<1%	<1%
Rental Car	5%	5%	6%
Tour Guide for Entire Trip	4%	1%	2%

\* 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 the United Kingdom to California  
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from the UK (n = 591)	Leisure Visitors from the UK (n = 396)
<b>Travel Companions**</b>			
Traveling Alone	61%	62%	48%
Spouse/Partner	21%	26%	38%
Family/Relatives	13%	10%	15%
Friends	6%	5%	7%
Business Associates	4%	2%	-
Tour Group	1%	-	-
<b>Average Travel Party Size</b>	1.6	1.5	1.7
<b>Median Travel Party Size</b>	1.0	1.0	2.0
<b>Type of Lodging**</b>			
Hotel / Motel	76%	79%	77%
Private Home	27%	28%	30%
Other	6%	8%	8%
<b>Length of Stay</b>			
Mean Nights in the U.S.	22.5 nights	16.0 nights	15.8 nights
Mean Nights in California	12.2 nights	10.3 nights	10.4 nights
% of California Nights	54%	64%	66%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	28%	15%	15%
Average Trips to the U.S. in Past Year	1.7 trips	1.7 trips	1.6 trips
<b>Average Number of States Visited</b>	2.0 states	1.8 states	1.8 states
<b>Average Number of Destinations Visited</b>	3.0 dest.	3.0 dest.	3.3 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	59%	52%	59%
San Francisco	47%	50%	51%
Las Vegas	30%	27%	35%
New York City	16%	7%	6%
San Diego	13%	14%	18%
Anaheim-Santa Ana	8%	10%	10%
Flagstaff-Grand Canyon-Sedona	7%	6%	8%
San Jose	6%	7%	4%
DC Metro Area	4%	2%	3%
Monterey-Salinas	4%	12%	13%
Oahu	4%	2%	2%
Santa Barbara	3%	5%	7%
Riverside/San Bernardino	3%	8%	8%
Chicago	3%	2%	2%
Seattle	3%	3%	2%
Sacramento	3%	3%	3%
Miami	3%	2%	2%

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**Characteristics of Travelers from the United Kingdom to California  
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from the UK (n = 591)	Leisure Visitors from the UK (n = 396)
<b>Activities Experienced While in the U.S.**</b>			
Shopping	88%	85%	90%
Sightseeing	84%	86%	93%
National Parks/Monuments	49%	54%	63%
Experience Fine Dining	43%	45%	43%
Small Towns/Countryside	41%	49%	54%
Amusement/Theme Parks	38%	32%	40%
Historical Locations	37%	42%	44%
Guided Tours	33%	43%	49%
Art Gallery/Museums	30%	35%	37%
Casino/Gamble	25%	23%	28%
Cultural/Ethnic Heritage Sites	21%	23%	26%
Concert/Play/Musical	20%	17%	17%
<b>Transportation While in the U.S.**</b>			
Air Travel between U.S. Cities	46%	32%	28%
Rented Auto	43%	45%	51%
Auto, Private or Company	37%	39%	40%
City Subway/Tram/Bus	33%	34%	35%
Taxicab/Limousine	33%	40%	35%
Bus between Cities	18%	11%	10%
Ferry/River Taxi/Srt. Scenic Cruise	12%	15%	16%
Railroad between Cities	8%	9%	8%
Rented Bicycle/Motorcycle/Moped	5%	5%	6%
Cruise Ship/River Boat 1+ Nights	4%	7%	9%
Motor Home/Camper	2%	4%	5%
<b>Visitor Spending***</b>			
CA Visitor Spending in the U.S. per Visitor	\$3,577	\$2,065	\$2,017
Per Visitor Per Day (CA)	\$159	\$129	\$128
Per Visitor/Trip (California)	\$1,940	\$1,329	\$1,327
<b>Spending by Category (Per Visitor/Trip)</b>			
Accommodations	29.1%	35.5%	27.9%
Air Transportation in the U.S.	6.9%	3.0%	3.5%
Entertainment	12.2%	13.9%	17.2%
Food/Beverages	17.8%	23.9%	25.8%
Gifts/Souvenirs	21.9%	14.0%	16.0%
Ground Transportation in the U.S.	5.6%	6.1%	6.2%
Other	6.3%	3.5%	3.4%

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\*\* Multiple response question. Table may add 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 the United Kingdom to California  
(2013 - cont.)**

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<b>Payment Method for Trip Expenses</b>			
Purchases Using Credit Card	44%	37%	28%
Cash from Home/Travelers Checks	26%	25%	29%
Cash Adv./Withdrawal Using Credit Card	18%	15%	17%
Cash Adv./Withdrawal Using Debit Card	7%	14%	16%
Purchases Using Debit Card	6%	9%	9%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	42 years	42 years	43 years
Average Age - Females	39 years	44 years	46 years
<b>Occupation</b>			
Mgmt., Business, Science, & Arts	44%	51%	43%
Service Occupations	11%	8%	9%
Student	11%	8%	7%
Sales and Office	10%	8%	8%
Retired	8%	12%	16%
Homemaker	5%	4%	6%
Prod., Trans., & Material Moving	4%	3%	3%
Military/Government	4%	3%	4%
Nat. Res., Const., & Maintenance	3%	2%	2%
Other	2%	2%	2%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	15%	3%	4%
\$20,000 - \$39,999	14%	7%	8%
\$40,000 - \$59,999	14%	12%	14%
\$60,000 - \$79,999	12%	16%	16%
\$80,000 - \$99,999	10%	16%	18%
\$100,000 - \$119,999	8%	8%	8%
\$120,000 - \$139,999	6%	10%	8%
\$140,000 - \$159,999	5%	5%	4%
\$160,000 - \$179,999	3%	2%	1%
\$180,000 - \$199,999	3%	4%	2%
\$200,000 and over	12%	18%	18%
Total	100%	100%	100%
Average Annual Income	\$100,889	\$131,449	\$122,112

\* 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."