

CHARACTERISTICS OF TRAVELERS FROM THE UNITED KINGDOM TO CALIFORNIA - 2014

The UK was California's second largest overseas market with approximately 686,000 visitors to California in 2014. Collectively, visitors from the UK spent approximately \$905 million in California.

UK visitors to California during 2014 reported spending \$121 per day during a 10.9 night average stay or approximately \$1,319 per visitor. The average spending for all overseas visitors to California was about \$1,872 (\$153 per day; 12.2 nights in California).

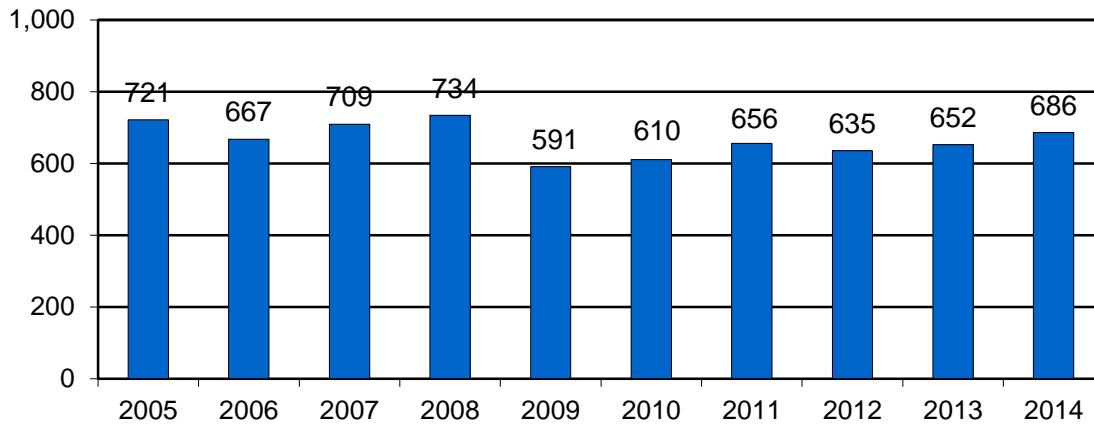
Visitors From the United Kingdom

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
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
2014	3,972,655	17.3%	686,000

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, 2005-2014 (in 000s)



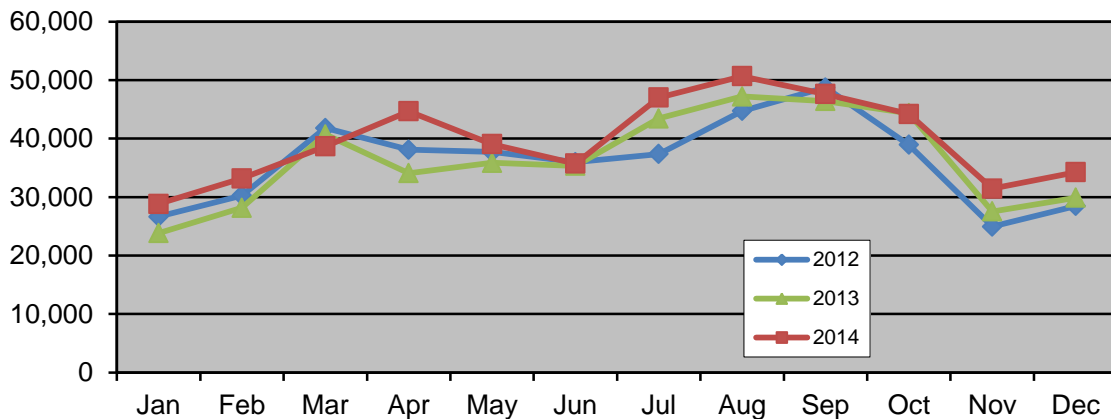
Sources: U.S. Dept. of Commerce, National Travel and Tourism Office, Revised by Tourism Economics for Visit California (October, 2015).

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 2014 compared with 2012 and 2013. 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
2012-2014**



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 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 for the purpose of vacation/holidays
- 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
- Travel with a spouse/partner
- Stay less time in the U.S.
- Spend a higher proportion of their time in California
- Go on guided tours while in the U.S.
- Spend their travel dollars 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
- 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
- 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 gifts or souvenirs
- Use a credit card for trip expenses

Characteristics of Travelers from The United Kingdom to California, 2014

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from the UK (n = 715)	Leisure Visitors from the UK (n = 569)
Primary Purpose of Trip			
Vacation/Holidays	54%	64%	76%
Visit Friends/Relatives	18%	20%	24%
Business	13%	10%	-
Convention/Conference	8%	5%	-
Other Purpose	7%	1%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	66%	75%	86%
Visit Friends/Relatives	34%	35%	37%
Business	18%	12%	1%
Convention/Conference	12%	7%	1%
Sources Used to Plan Trip**			
Airline	43%	54%	55%
Online Travel Agency	32%	36%	39%
Travel Agency Office	25%	19%	22%
Personal Recommendation	29%	23%	27%
Travel Guide	15%	14%	17%
Corporate Travel Department	12%	10%	4%
Tour Operator/Travel Club	10%	15%	16%
National/State/City Travel Office	8%	5%	5%
Advance Planning for Trip			
7 days or less	5%	3%	2%
8 - 30 days	25%	17%	10%
31 - 60 days	19%	16%	16%
61 - 90 days	15%	13%	12%
More than 3 Months	36%	53%	61%
Total	100%	100%	100%
Average Planning Time in Days	106 days	149 days	171 days
Advance Airline Reservations			
7 days or less	9%	5%	4%
8 - 30 days	35%	22%	15%
31 - 60 days	19%	17%	18%
61 - 90 days	12%	12%	12%
91 - 120 days	8%	9%	9%
121 - 180 days	10%	15%	18%
6 Months or More	8%	20%	25%
Total	100%	100%	100%
Average Booking in Days	74 days	117 days	134 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
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from the UK (n = 715)	Leisure Visitors from the UK (n = 569)
Means of Booking Air Trip**			
Travel Agency Office	29%	20%	22%
Airlines Directly	29%	40%	42%
Internet Booking Service	27%	21%	22%
Corporate Travel Department	12%	9%	2%
Tour Operator/Travel Club	10%	14%	16%
Other	1%	1%	1%
Main Factor in Selecting Airline			
Airfare	31%	27%	28%
Non-Stop Flights	19%	23%	24%
Convenient Schedule	14%	16%	17%
Previous Good Experience	8%	12%	13%
Mileage Bonus/Frequent Flyer Program	6%	5%	4%
Safety Reputation	6%	2%	2%
Loyalty to Carrier	3%	2%	2%
In-flight Service Reputation	3%	3%	3%
Employer policy	2%	2%	1%
On-time Reputation	2%	2%	2%
Other	5%	5%	4%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	83%	80%	82%
Premium Economy	9%	18%	18%
Executive/Business	8%	2%	1%
First Class	1%	<1%	<1%
Total	100%	100%	100.0%
Use of Package			
Yes	15%	19%	22%
No	85%	81%	78%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	7%	5%	6%
Bus/Coach	6%	6%	7%
Guided Tours	6%	4%	5%
Meals	6%	5%	5%
Rental Car	5%	8%	9%
Tour Guide for Entire Trip	4%	2%	3%
Airfare and Accommodation Only	2%	3%	3%
Cruise	2%	4%	5%
Recreation	2%	<1%	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 the United Kingdom to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from the UK (n = 715)	Leisure Visitors from the UK (n = 569)
Travel Companions**			
Traveling Alone	59%	54%	43%
Spouse/Partner	22%	32%	42%
Family/Relatives	15%	13%	17%
Friends	6%	5%	6%
Business Associates	3%	2%	-
Tour Group	1%	-	-
Average Travel Party Size	1.7	1.7	1.8
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	76%	77%
Private Home	30%	32%	33%
Other	6%	4%	5%
Length of Stay			
Mean Nights in the U.S.	23.4 nights	17.7 nights	22.3 nights
Mean Nights in California	12.2 nights	10.9 nights	10.6 nights
% of California Nights	52%	62%	48%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	27%	13%	13%
Average Trips to the U.S. in Past Year	1.7 trips	1.6 trips	1.5 trips
Average Number of States Visited	2.1 states	1.8 states	1.9 states
Average Number of Destinations Visited	3.1 dest.	3.1 dest.	3.4 dest.
Places Visited in the U.S.**			
Los Angeles	62%	51%	56%
San Francisco	44%	45%	46%
Las Vegas	29%	27%	31%
New York City	16%	8%	8%
San Diego	14%	17%	16%
Anaheim-Santa Ana	8%	9%	10%
Flagstaff-Grand Canyon-Sedona	7%	7%	19%
San Jose	6%	5%	4%
Monterey-Salinas	5%	9%	12%
DC Metro Area	4%	2%	2%
Riverside/San Bernardino	4%	8%	8%
Santa Barbara	4%	7%	8%
Chicago	3%	3%	2%
Oahu	3%	2%	2%
Seattle	3%	3%	3%
Sacramento	3%	4%	5%
Miami	3%	1%	1%

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**Characteristics of Travelers from the United Kingdom to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from the UK (n = 715)	Leisure Visitors from the UK (n = 569)
Activities Experienced While in the U.S.**			
Shopping	89%	90%	92%
Sightseeing	83%	89%	91%
National Parks/Monuments	52%	55%	61%
Small Towns/Countryside	44%	52%	55%
Experience Fine Dining	43%	39%	40%
Amusement/Theme Parks	40%	31%	34%
Historical Locations	35%	43%	46%
Guided Tours	33%	45%	50%
Art Gallery/Museums	31%	31%	33%
Casino/Gamble	24%	26%	29%
Concert/Play/Musical	21%	19%	20%
Cultural/Ethnic Heritage Sites	20%	21%	22%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	45%	34%	35%
Rented Auto	44%	46%	50%
Auto, Private or Company	38%	33%	33%
City Subway/Tram/Bus	31%	33%	32%
Taxicab/Limousine	31%	36%	33%
Bus between Cities	19%	17%	17%
Ferry/River Taxi/Srt. Scenic Cruise	10%	14%	16%
Railroad between Cities	7%	6%	5%
Rented Bicycle/Motorcycle/Moped	5%	6%	6%
Cruise Ship/River Boat 1+ Nights	4%	8%	10%
Motor Home/Camper	2%	2%	2%
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,590	\$2,141	\$2,213
Per Visitor Per Day (CA)	\$153	\$121	\$130
Per Visitor/Trip (California)	\$1,872	\$1,319	\$1,380
Spending by Category (Per Visitor/Trip)			
Accommodations	30.4%	29.2%	24.6%
Air Transportation in the U.S.	6.6%	2.3%	1.9%
Entertainment	12.5%	17.2%	19.8%
Food/Beverages	18.1%	26.7%	28.7%
Gifts/Souvenirs	21.1%	14.1%	14.9%
Ground Transportation in the U.S.	6.2%	5.6%	5.5%
Other	4.9%	4.7%	4.5%

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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
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from the UK (n = 715)	Leisure Visitors from the UK (n = 569)
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	34%	32%
Cash from Home/Travelers Checks	27%	32%	35%
Cash Adv./Withdrawal Using Credit Card	18%	16%	15%
Cash Adv./Withdrawal Using Debit Card	6%	10%	10%
Purchases Using Debit Card	6%	8%	8%
Total	100%	100%	100%
Age			
Average Age - Males	40 years	42 years	43 years
Average Age - Females	38 years	43 years	45 years
Occupation			
Mgmt., Business, Science & Arts	44%	44%	40%
Service Occupations	11%	10%	11%
Student	11%	8%	7%
Sales and Office	11%	10%	10%
Retired	8%	18%	21%
Homemaker	4%	2%	2%
Prod., Trans., & Material Moving	4%	2%	2%
Nat. Res., Const., & Maintenance	3%	3%	2%
Military/Government	2%	3%	3%
Other	2%	1%	1%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	5%	7%
\$20,000 - \$39,999	13%	7%	7%
\$40,000 - \$59,999	14%	16%	17%
\$60,000 - \$79,999	11%	14%	15%
\$80,000 - \$99,999	10%	12%	12%
\$100,000 - \$119,999	9%	10%	9%
\$120,000 - \$139,999	6%	10%	8%
\$140,000 - \$159,999	4%	7%	7%
\$160,000 - \$179,999	3%	6%	6%
\$180,000 - \$199,999	2%	2%	2%
\$200,000 and over	11%	13%	10%
Total	100%	100%	100%
Average Annual Income	\$95,782	\$111,970	\$105,027

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