

CHARACTERISTICS OF TRAVELERS FROM THE UNITED KINGDOM TO CALIFORNIA

The UK was California's largest overseas market with approximately 663,000 visitors to California in 2009. Collectively, visitors from the UK spent approximately \$668 million in California.

UK visitors to California during 2009 reported spending \$106 per day during an 9.5 night average stay or approximately \$1,007 per visitor. The average spending for all overseas visitors to California was about \$1,205 (\$103 per day; 11.7 nights in California).

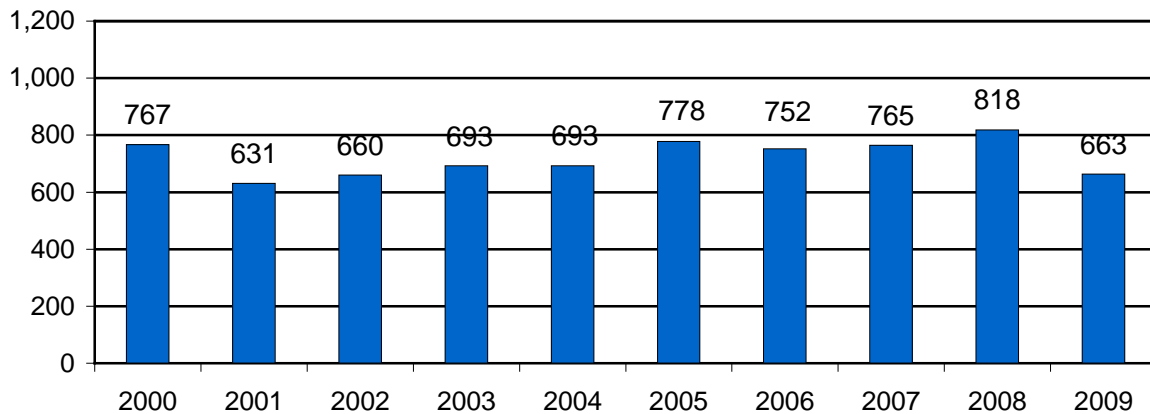
Visitors From the United Kingdom

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
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
2009	3,899,167	17.0%	663,000

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, 2000-2009 (in 000s)



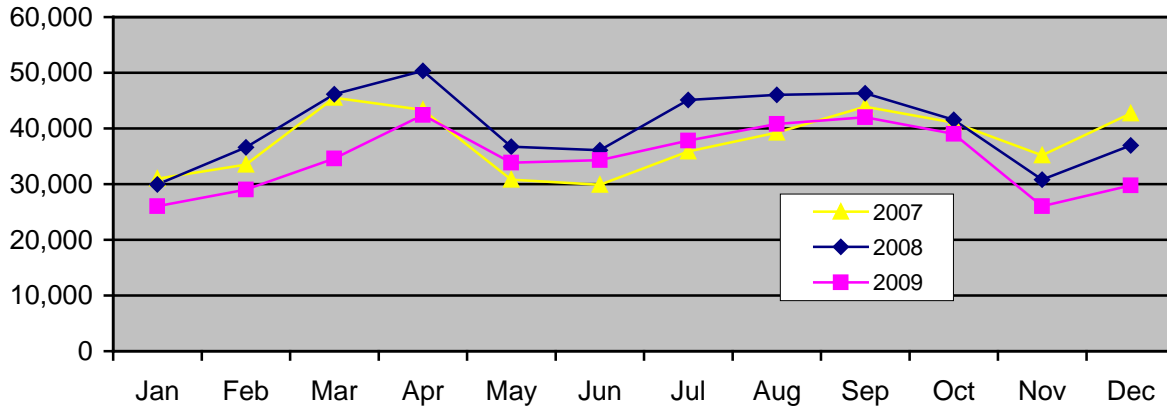
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 2009 compared with 2007 and 2008. In general, UK residents arriving at California ports-of-entry peaked in April and September. The lowest volumes were recorded in January and November.

**Residents of the U.K.
Monthly Port of Entry Arrivals to CA
2007-2009**



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
- Book their air trip via a personal computer
- Have a decidedly longer trip planning and advance airline booking horizon
- Travel with a spouse
- Stay in a hotel or motel
- Stay less time in the U.S.
- Visit San Francisco or Las Vegas as part of their trip
- Dine out, visit historical places, tour the countryside, and go on guided tours while in the U.S.
- Have a higher average annual household income

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
- Stay in a private home
- 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, 2009**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from the UK (n = 717)	Leisure Visitors from the UK (n = 531)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	47%	64%	79%
Business/Professional	22%	13%	-
Visit Friends/Relatives	21%	17%	21%
Convention/Conference	6%	3%	-
Other Purpose	5%	3%	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	65%	79%	91%
Visit Friends/Relatives	37%	33%	36%
Business/Professional	26%	17%	2%
Convention/Conference	8%	5%	-
Sources Used to Plan Trip**			
Airlines Directly	23%	26%	26%
Corporate Travel Department	8%	7%	1%
Personal Computer	43%	47%	49%
Friends/Relatives	18%	18%	20%
Newspapers/Magazines	3%	2%	3%
State/City Travel Office	4%	1%	1%
Tour Company	7%	11%	13%
Travel Agency	40%	31%	31%
Travel Guides	10%	8%	9%
Advance Planning for Trip			
7 days or less	7%	5%	2%
8 - 30 days	28%	20%	16%
31 - 60 days	19%	17%	16%
61 - 90 days	12%	9%	9%
More than 3 Months	34%	50%	57%
Total	100%	100%	100%
Average Planning Time in Days	100 days	132 days	147 days
Advance Airline Reservations			
7 days or less	13%	8%	5%
8 - 30 days	38%	27%	23%
31 - 60 days	16%	14%	14%
61 - 90 days	10%	10%	11%
91 - 120 days	6%	9%	10%
121 - 180 days	10%	16%	18%
6 Months or More	7%	32%	19%
Total	100%	100%	100%
Average Booking in Days	67 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
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from the UK (n = 717)	Leisure Visitors from the UK (n = 531)
Means of Booking Air Trip			
Airlines Directly	13%	15%	16%
Corporate Travel Department	9%	8%	3%
Personal Computer	25%	34%	36%
Travel Agent	46%	29%	30%
Travel Club	1%	-	-
Tour Operator	5%	10%	12%
Other/Don't Know	2%	4%	3%
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	32%	31%	33%
Schedule	13%	14%	14%
Non-Stop Flight	12%	14%	15%
Mileage Bonus/Frequent Flyer Program	10%	7%	7%
Previous Good Experience	9%	16%	17%
Safety Reputation	6%	3%	3%
Airline Loyalty	4%	4%	5%
In-flight Service	5%	2%	1%
Employer policy	3%	3%	-
Other	6%	6%	6%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	81%	81%	85%
Executive/Business	17%	16%	13%
First Class	2%	3%	3%
Total	100%	100%	100%
Use of Package			
Yes	14%	21%	25%
No	86%	80%	75%
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	-	-
8 - 30 days	24%	14%	13%
31 - 60 days	13%	11%	12%
61 - 90 days	13%	7%	7%
91 - 120 days	8%	8%	8%
121 - 180 days	18%	25%	26%
6 Months or More	20%	34%	35%
Total	100%	100%	100%

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**Characteristics of Travelers from the United Kingdom to California
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from the UK (n = 717)	Leisure Visitors from the UK (n = 531)
Travel Companions**			
Business Associates	8%	2%	-
Family/Relatives	25%	21%	24%
Friends	11%	13%	15%
Spouse	28%	40%	47%
Tour Group	2%	3%	4%
Traveling Alone	38%	32%	22%
Average Travel Party Size	1.6	1.6	1.8
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	86%	85%
Private Home	30%	22%	23%
Other	4%	4%	5%
Length of Stay			
Mean Nights in the U.S.	22.4 nights	17.6 nights	16.5 nights
Mean Nights in California	11.7 nights	9.5 nights	8.8 nights
% of California Nights	52%	54%	53%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	20%	21%
Average Trips to the U.S. in Past Year	1.7 trips	1.7 trips	1.5 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	5.0 trips	3.9 trips
Average Number of States Visited	2.1 states	2.0 states	2.1 states
Average Number of Destinations Visited	3.0 dest.	3.1 dest.	3.3 dest.
Places Visited in the U.S.**			
Los Angeles	55%	44%	45%
San Francisco	48%	57%	59%
Las Vegas	30%	37%	44%
New York City	18%	9%	10%
San Diego	13%	14%	14%
Anaheim-Santa Ana	7%	6%	7%
Grand Canyon	7%	6%	7%
San Jose	6%	3%	1%
Yosemite	4%	8%	11%
Chicago	4%	5%	5%
DC Metro Area	4%	1%	2%
Monterey-Salinas	4%	4%	5%
Riverside/San Bernardino	4%	10%	11%
Seattle	3%	2%	2%
Sacramento	3%	5%	4%
Santa Barbara	3%	4%	5%
Oakland	2%	2%	2%

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**Characteristics of Travelers from the United Kingdom to California
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from the UK (n = 717)	Leisure Visitors from the UK (n = 531)
Activities Experienced While in the U.S.**			
Shopping	87%	86%	90%
Dining Out	86%	95%	95%
Sightseeing in Cities	56%	63%	70%
Historical Places	45%	56%	62%
National Parks	39%	47%	55%
Amusement/Theme Parks	39%	33%	37%
Visiting Small Towns	38%	45%	50%
Cultural Heritage Sites	32%	40%	45%
Touring Countryside	31%	45%	51%
Casinos/Gambling	27%	29%	34%
Art Gallery/Museum	26%	27%	29%
Guided Tours	24%	36%	43%
Transportation While in the U.S.**			
Airlines in U.S.	39%	31%	32%
Taxi/Limousine	39%	45%	43%
Rented Auto	38%	38%	39%
Company or Private Auto	29%	25%	26%
City Subway/Tram/Bus	26%	26%	28%
Railroad between Cities	11%	10%	10%
Bus between Cities	10%	11%	11%
Motor Home/Camper	2%	1%	2%
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,584	\$3,050	\$3,301
Per Visitor/Trip (U.S.)	\$2,308	\$1,865	\$1,829
Per Visitor Per Day	\$103	\$106	\$111
Per Visitor/Trip (California)	\$1,205	\$1,007	\$977
Spending by Category (Per Visitor/Trip)			
Lodging	\$660	\$621	\$524
Food/Beverages	\$463	\$426	\$455
Gifts/Souvenirs	\$395	\$185	\$185
Transportation in the U.S.	\$348	\$255	\$265
Entertainment	\$234	\$244	\$284
Expenses at the Airport	\$34	\$25	\$24
Other	\$174	\$108	\$92
Total Spending Per Visitor/Trip	\$2,308	\$1,865	\$1,829

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Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from the UK (n = 717)	Leisure Visitors from the UK (n = 531)
Payment Method for Trip Expenses			
Credit Cards	50%	41%	37%
Cash	41%	45%	48%
Debit Cards	7%	11%	12%
Travelers Checks	2%	4%	4%
Total	100%	100%	100%
Age			
Average Age - Males	43 years	45 years	46 years
Average Age - Females	39 years	44 years	45 years
Occupation			
Professional/Technical	35%	33%	32%
Manager/Executive	28%	23%	18%
Student	10%	7%	5%
Retired	8%	14%	18%
Clerical/Sales	7%	8%	9%
Other	13%	15%	18%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	9%	4%	4%
\$20,000 - \$39,999	14%	14%	14%
\$40,000 - \$59,999	14%	13%	13%
\$60,000 - \$79,999	13%	15%	16%
\$80,000 - \$99,999	11%	13%	15%
\$100,000 - \$119,999	9%	7%	7%
\$120,000 - \$139,999	6%	8%	8%
\$140,000 - \$159,999	5%	4%	3%
\$160,000 - \$179,999	3%	6%	7%
\$180,000 - \$199,999	3%	3%	3%
\$200,000 and over	12%	13%	9%
Total	100%	100%	100%
Average Annual Income	\$94,800	\$101,500	\$95,900

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