

## CHARACTERISTICS OF TRAVELERS FROM THE UNITED KINGDOM TO CALIFORNIA - 2015

The UK was California's second largest overseas market with approximately 705,000 visitors to California in 2015, up from 686,000 visitors in 2014. Collectively, visitors from the UK spent approximately \$1,044 million in California in 2015, up from \$905 million in 2014.

UK visitors to California during 2015 reported spending \$132 per day during an 11.2 night average stay or approximately \$1,482 per visitor. The average spending for all overseas visitors to California was about \$1,979 (\$157 per day; 12.6 nights in California).

### Visitors From the United Kingdom

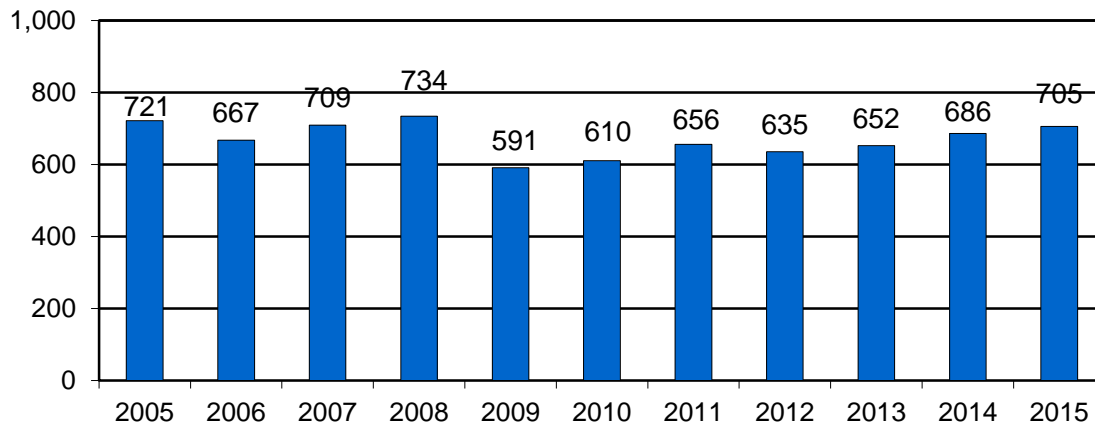
Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
2005	4,344,957	16.6%	721,000
2006	4,176,211	16.0%	667,000
2007	4,497,858	15.8%	709,000
2008	4,564,895	16.1%	734,000
2009	3,899,167	15.2%	591,000
2010	3,850,864	15.8%	610,000
2011	3,835,300	17.1%	656,000
2012	3,763,381	16.9%	635,000
2013	3,835,308	17.0%	652,000
2014 <sup>3</sup>	3,972,655	17.3%	686,000
2015 <sup>3</sup>	4,329,250	16.3%	705,000

1) U.S. Dept. of Homeland Security, Form I-94, Non-Resident Arrival Records.

2) U.S. Dept. of Commerce, NTTO, "Survey of International Air Travelers."

3) Sourced from Tourism Economics.

### Number of Visitors from the U.K. to CA, 2005-2015 (in 000s)



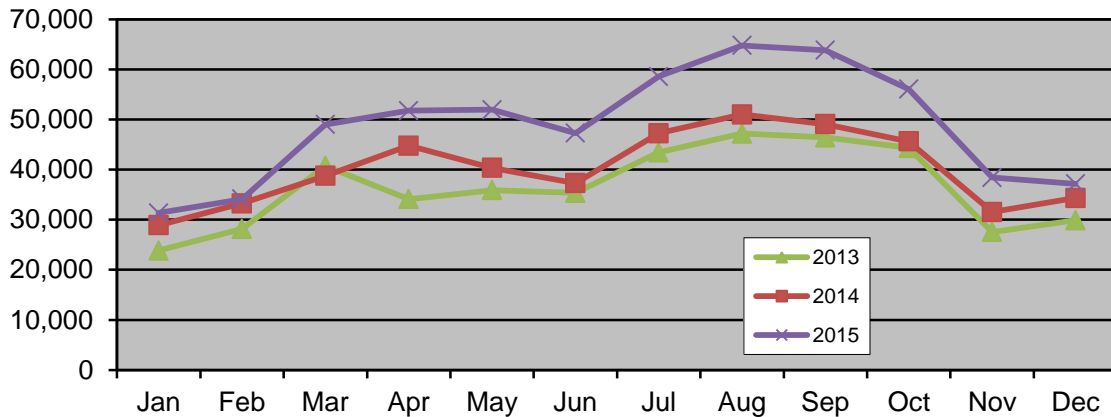
Sources: U.S. Dept. of Commerce, National Travel and Tourism Office,  
Revised by Tourism Economics for Visit California (October, 2015).

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. There has, however, been a slow but steady increase in visitors to California from the UK since 2012.

## UK Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from the UK to California were generally higher in 2015 compared with 2014 and 2013. UK residents arriving at California ports-of-entry peaked in August and September. The lowest volumes were recorded in January, February, and November.

**Residents of the U.K.  
Monthly Port of Entry Arrivals to CA  
2013-2015**



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:

- 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
- Visit historical locations or go on guided tours while in the U.S.
- Spend their travel dollars on entertainment as well as food/beverages
- Have a higher annual household income
- Be retired

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 as part of their trip
- Spend their travel dollars in the U.S. or in California
- Spend their travel dollars on gifts or souvenirs

### Characteristics of Travelers from The United Kingdom to California, 2015

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from the UK (n = 760)	Leisure Visitors from the UK (n = 562)
<b>Primary Purpose of Trip</b>			
Vacation/Holidays	54%	61%	75%
Visit Friends/Relatives	18%	21%	25%
Business	13%	11%	-
Convention/Conference	9%	6%	-
Other Purpose	6%	1%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Vacation/Holidays	67%	73%	85%
Visit Friends/Relatives	34%	37%	41%
Business	17%	14%	1%
Convention/Conference	12%	7%	<1%
<b>Sources Used to Plan Trip**</b>			
Airline	43%	53%	54%
Online Travel Agency	34%	36%	39%
Personal Recommendation	29%	25%	29%
Travel Agency Office	23%	17%	18%
Travel Guide	15%	16%	18%
Corporate Travel Department	12%	10%	2%
Tour Operator/Travel Club	9%	12%	13%
National/State/City Travel Office	7%	4%	4%
<b>Advance Planning for Trip</b>			
7 days or less	5%	3%	3%
8 - 30 days	24%	16%	9%
31 - 60 days	19%	15%	15%
61 - 90 days	15%	13%	13%
More than 3 Months	38%	53%	61%
Total	100%	100%	100%
Average Planning Time in Days	108 days	141 days	158 days
<b>Advance Airline Reservations</b>			
7 days or less	8%	7%	5%
8 - 30 days	33%	20%	14%
31 - 60 days	20%	17%	17%
61 - 90 days	13%	12%	12%
91 - 120 days	9%	10%	11%
121 - 180 days	10%	13%	16%
6 Months or More	8%	21%	26%
Total	100%	100%	100%
Average Booking in Days	76 days	111 days	127 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  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from the UK (n = 760)	Leisure Visitors from the UK (n = 562)
<b>Means of Booking Air Trip**</b>			
Airlines Directly	31%	40%	41%
Internet Booking Service	29%	26%	28%
Travel Agency Office	26%	16%	16%
Corporate Travel Department	12%	10%	2%
Tour Operator/Travel Club	9%	12%	15%
Other	1%	2%	3%
<b>Main Factor in Selecting Airline</b>			
Airfare	29%	30%	31%
Non-Stop Flights	17%	20%	19%
Convenient Schedule	15%	15%	16%
Previous Good Experience	9%	12%	13%
Mileage Bonus/Frequent Flyer Program	8%	6%	5%
Safety Reputation	9%	4%	4%
Loyalty to Carrier	3%	4%	4%
In-flight Service Reputation	3%	3%	3%
Employer policy	3%	2%	1%
On-time Reputation	2%	<1%	<1%
Other	3%	5%	5%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	82%	77%	78%
Premium Economy	10%	20%	19%
Executive/Business	8%	3%	2%
First Class	1%	1%	1%
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	14%	11%	13%
No	86%	90%	87%
Total	100%	100%	100%
<b>Travel Package Includes**</b>			
Attractions/Events/Entertainment	6%	2%	2%
Meals	6%	1%	1%
Bus/Coach	6%	2%	3%
Guided Tours	6%	1%	2%
Rental Car	4%	4%	5%
Tour Guide for Entire Trip	5%	1%	1%
Airfare and Accommodation Only	3%	3%	4%
Cruise	2%	1%	2%
Recreation	1%	<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  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from the UK (n = 760)	Leisure Visitors from the UK (n = 562)
<b>Travel Companions**</b>			
Traveling Alone	59%	57%	45%
Spouse/Partner	22%	30%	40%
Family/Relatives	15%	14%	18%
Friends	6%	4%	5%
Business Associates	4%	1%	-
Tour Group	1%	-	-
<b>Average Travel Party Size</b>	1.7	1.6	1.8
<b>Median Travel Party Size</b>	1.0	1.0	2.0
<b>Type of Lodging**</b>			
Hotel / Motel	73%	79%	79%
Private Home	32%	32%	35%
Other	6%	6%	6%
<b>Length of Stay</b>			
Mean Nights in the U.S.	22.6 nights	22.2 nights	22.7 nights
Mean Nights in California	12.6 nights	11.2 nights	10.4 nights
% of California Nights	52%	50%	46%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	28%	15%	16%
Average Trips to the U.S. in Past Year	1.7 trips	1.6 trips	1.5 trips
<b>Average Number of States Visited</b>	2.0 states	1.9 states	2.0 states
<b>Average Number of Destinations Visited</b>	3.1 dest.	3.3 dest.	3.6 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	60%	50%	53%
San Francisco	45%	50%	51%
Las Vegas	30%	29%	35%
New York City	15%	10%	11%
San Diego	14%	18%	19%
Anaheim-Santa Ana	8%	8%	9%
Flagstaff-Grand Canyon-Sedona	7%	7%	8%
San Jose	6%	6%	4%
DC Metro Area	5%	3%	3%
Monterey-Salinas	5%	7%	8%
Santa Barbara	4%	7%	8%
Riverside/San Bernardino	4%	7%	8%
Oahu	3%	2%	2%
Seattle	3%	3%	3%
Chicago	3%	3%	3%
Miami	2%	2%	2%
Sacramento	2%	4%	5%

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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  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from the UK (n = 760)	Leisure Visitors from the UK (n = 562)
<b>Activities Experienced While in the U.S.**</b>			
Shopping	87%	89%	91%
Sightseeing	83%	89%	92%
National Parks/Monuments	51%	57%	62%
Small Towns/Countryside	42%	50%	54%
Experience Fine Dining	40%	44%	45%
Amusement/Theme Parks	39%	33%	36%
Historical Locations	34%	43%	47%
Guided Tours	31%	40%	46%
Art Gallery/Museums	33%	33%	35%
Casino/Gamble	24%	26%	31%
Cultural/Ethnic Heritage Sites	20%	20%	22%
Concert/Play/Musical	20%	21%	24%
<b>Transportation While in the U.S.**</b>			
Rented Auto	44%	46%	50%
Air Travel between U.S. Cities	44%	39%	40%
Auto, Private or Company	37%	34%	35%
City Subway/Tram/Bus	31%	33%	32%
Taxicab/Limousine	31%	36%	33%
Bus between Cities	19%	13%	13%
Ferry/River Taxi/Srt. Scenic Cruise	10%	14%	16%
Railroad between Cities	7%	5%	5%
Rented Bicycle/Motorcycle/Moped	5%	7%	7%
Cruise Ship/River Boat 1+ Nights	4%	6%	7%
Motor Home/Camper	2%	2%	2%
<b>Visitor Spending***</b>			
CA Visitor Spending in the U.S. per Visitor	\$3,401	\$2,678	\$2,690
Per Visitor Per Day (CA)	\$157	\$132	\$131
Per Visitor/Trip (California)	\$1,979	\$1,482	\$1,361
<b>Spending by Category (Per Visitor/Trip)</b>			
Accommodations	31.5%	31.4%	25.5%
Air Transportation in the U.S.	5.9%	4.5%	4.8%
Entertainment	12.9%	18.3%	21.7%
Food/Beverages	19.9%	25.4%	26.7%
Gifts/Souvenirs	19.2%	11.9%	12.8%
Ground Transportation in the U.S.	6.3%	4.0%	4.0%
Other	4.2%	4.3%	4.6%

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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  
(2015 - cont.)**

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<b>Payment Method for Trip Expenses</b>			
Purchases Using Credit Card	43%	35%	33%
Cash from Home/Travelers Checks	27%	31%	33%
Cash Adv./Withdrawal Using Credit Card	18%	17%	17%
Cash Adv./Withdrawal Using Debit Card	6%	9%	10%
Purchases Using Debit Card	6%	8%	8%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	41 years	43 years	45 years
Average Age - Females	38 years	36 years	41 years
<b>Occupation</b>			
Mgmt., Business, Science & Arts	46%	46%	40%
Service Occupations	11%	8%	8%
Student	12%	7%	7%
Sales and Office	11%	9%	10%
Retired	8%	15%	19%
Homemaker	4%	4%	4%
Prod., Trans., & Material Moving	3%	2%	2%
Military/Government	3%	5%	6%
Nat. Res., Const., & Maintenance	3%	3%	4%
Other	1%	<1%	1%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	15%	4%	4%
\$20,000 - \$39,999	15%	10%	11%
\$40,000 - \$59,999	15%	13%	15%
\$60,000 - \$79,999	14%	19%	20%
\$80,000 - \$99,999	10%	10%	11%
\$100,000 - \$119,999	10%	8%	6%
\$120,000 - \$139,999	4%	5%	4%
\$140,000 - \$159,999	4%	11%	10%
\$160,000 - \$179,999	3%	5%	5%
\$180,000 - \$199,999	1%	2%	2%
\$200,000 and over	10%	13%	12%
Total	100%	100%	100%
Average Annual Income	\$89,309	\$113,513	\$111,929

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