

## CHARACTERISTICS OF TRAVELERS FROM THE UNITED KINGDOM TO CALIFORNIA

The UK was California's largest overseas market with approximately 765,000 visitors to California in 2007. Collectively, visitors from the UK spent approximately \$875 million in California.

UK visitors to California during 2007 reported spending \$123 per day during a 9.3 night average stay or approximately \$1,144 per visitor. The average spending for all overseas visitors to California was about \$1,166 (\$111 per day; 10.5 nights in California).

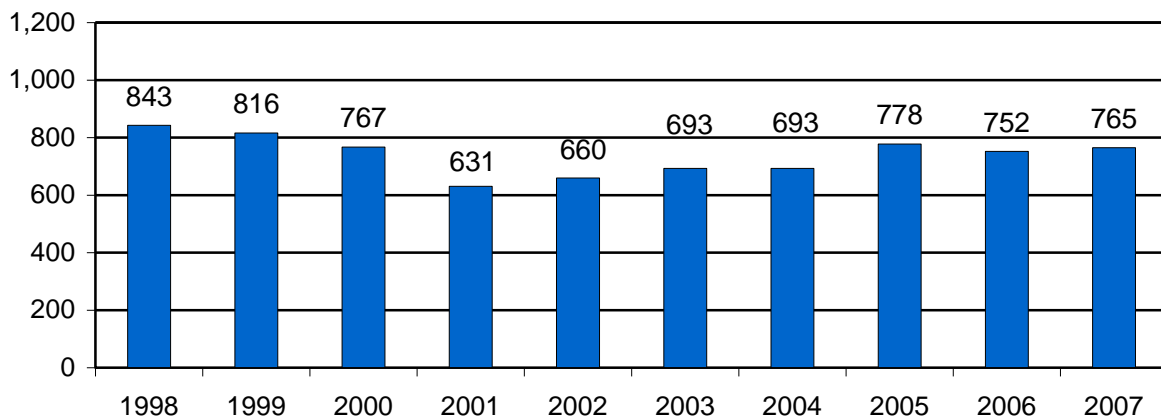
**Visitors From the United Kingdom**

| Year | Total U.S. Arrivals <sup>1</sup> | California Market Share <sup>2</sup> | Visitors to California (est.) |
|------|----------------------------------|--------------------------------------|-------------------------------|
| 1997 | 3,720,979                        | 21.9%                                | 815,000                       |
| 1998 | 3,974,976                        | 21.2%                                | 843,000                       |
| 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                       |

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, 1998-2007  
(in 000s)**



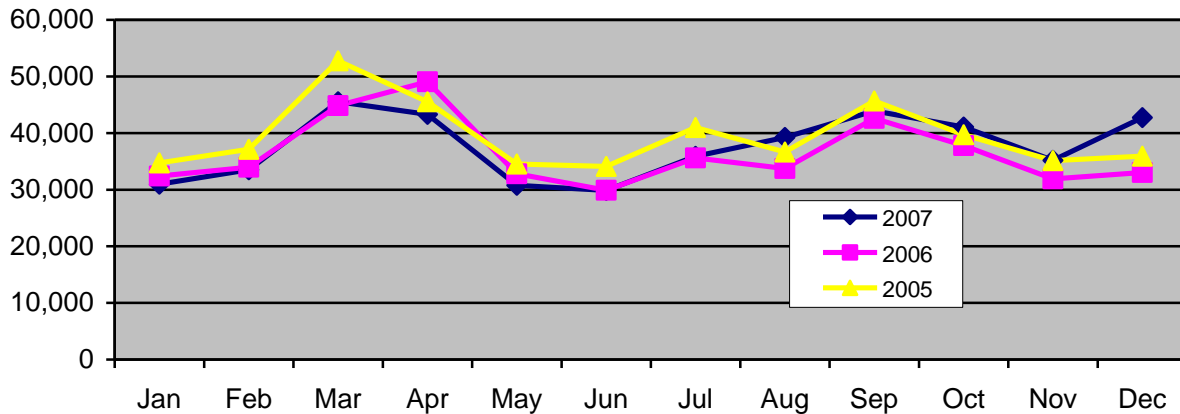
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 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 2007 compared with 2005 and 2006. However, an increase in California port-of-entry volume from the UK occurred in December 2007 and this trend appears to have continued through the first five months of 2008. In general, UK residents arriving at California ports-of-entry peaked in March/April, September and December. The lowest volumes were recorded in January, and May/June.

**Residents of the U.K.  
Monthly Port of Entry Arrivals to CA  
2005-2007**



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
- Make use of a personal computer as a trip planning aid and means of booking their air trip
- Have a decidedly longer trip planning and advance airline booking horizon
- Mention previous experience as a main factor in selecting an airline
- Make use of a travel package
- Travel with a spouse
- Stay in hotels and other forms of paid lodging
- Stay less time in the U.S.
- Experience most leisure-oriented activities 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
- Be on their first trip to the U.S.
- Visit Los Angeles as part of their trip
- Use credit cards to pay for trip expenses

**Characteristics of Travelers from  
The United Kingdom to California, 2007**

| Trip & Traveler Characteristics     | All Overseas<br>Visitors*<br>(n = 8,200) | All Visitors<br>from the UK<br>(n = 690) | Leisure<br>Visitors from<br>the UK<br>(n = 439) |
|-------------------------------------|--|--|---|
| <b>Primary Purpose of Trip</b>      |  |  |   |
| Leisure/Recreation/Holidays         | 37%                                      | 52%                                      | 75%   |
| Visit Friends/Relatives             | 20                                       | 17                                       | 25  |
| Business/Professional               | 31                                       | 25                                       | -   |
| Convention/Conference               | 8  | 4  | -   |
| Other Purpose                       | 4  | 1  | -   |
| Total                               | 100%                                     | 100%                                     | 100%  |
| <b>Purpose of Trip**</b>            |  |  |   |
| Leisure/Recreation/Holidays         | 55%                                      | 65%                                      | 85%   |
| Visit Friends/Relatives             | 38                                       | 35                                       | 45  |
| Business/Professional               | 35                                       | 30                                       | 2   |
| Convention/Conference               | 13                                       | 8  | 1   |
| <b>Sources Used to Plan Trip**</b>  |  |  |   |
| Airlines Directly                   | 19%                                      | 21%                                      | 22%   |
| Corporate Travel Department         | 12                                       | 13                                       | 3   |
| Personal Computer                   | 36                                       | 43                                       | 49  |
| Friends/Relatives                   | 15                                       | 13                                       | 17  |
| Newspapers/Magazines                | 3  | 2  | 3   |
| State/City Travel Office            | 3  | 3  | 4   |
| Tour Company                        | 5  | 9  | 12  |
| Travel Agency                       | 48                                       | 40                                       | 43  |
| Travel Guides                       | 9  | 12                                       | 15  |
| <b>Advance Planning for Trip</b>    |  |  |   |
| 7 days or less                      | 9%                                       | 7%                                       | 4%  |
| 8 - 30 days                         | 36                                       | 22                                       | 12  |
| 31 - 60 days                        | 20                                       | 20                                       | 16  |
| 61 - 90 days                        | 11                                       | 10                                       | 12  |
| More than 3 Months                  | 25                                       | 34                                       | 48  |
| Total                               | 100%                                     | 100%                                     | 100%  |
| Average Planning Time in Days       | 81                                       | 119                                      | 154   |
| <b>Advance Airline Reservations</b> |  |  |   |
| 7 days or less                      | 16%                                      | 11%                                      | 7%  |
| 8 - 30 days                         | 43                                       | 32                                       | 19  |
| 31 - 60 days                        | 16                                       | 15                                       | 15  |
| 61 - 90 days                        | 8  | 10                                       | 14  |
| 91 - 120 days                       | 6  | 9  | 12  |
| 121 - 180 days                      | 6  | 8  | 11  |
| 6 Months or More                    | 5  | 15                                       | 23  |
| Total                               | 100%                                     | 100%                                     | 100%  |
| Average Booking in Days             | 55                                       | 91                                       | 121   |

\* 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  
(2007 - cont.)**

| <b>Trip &amp; Traveler Characteristics</b> | <b>All Overseas<br/>Visitors*<br/>(n = 8,200)</b> | <b>All Visitors<br/>from the UK<br/>(n = 690)</b> | <b>Leisure<br/>Visitors from<br/>the UK<br/>(n = 439)</b> |
|--|---|---|---|
| <b>Means of Booking Air Trip</b>           |   |   |   |
| Airlines Directly                          | 10%   | 11%   | 13%   |
| Corporate Travel Department                | 12  | 12  | 1   |
| Personal Computer                          | 18  | 32  | 37  |
| Travel Agent                               | 54  | 37  | 37  |
| Travel Club                                | 0   | 0   | 0   |
| Tour Operator                              | 4   | 7   | 10  |
| Other/Don't Know                           | 2   | 1   | 1   |
| Total                                      | 100%  | 100%  | 100%  |
| <b>Main Factor in Selecting Airline</b>    |   |   |   |
| Airfare                                    | 24%   | 22%   | 25%   |
| Schedule                                   | 16  | 19  | 17  |
| Non-Stop Flight                            | 12  | 14  | 16  |
| Mileage Bonus/Frequent Flyer<br>Program    | 11  | 7   | 4   |
| Previous Good Experience                   | 9   | 16  | 17  |
| Safety Reputation                          | 7   | 3   | 2   |
| Airline Loyalty                            | 5   | 4   | 3   |
| In-flight Service                          | 5   | 3   | 4   |
| Employer policy                            | 4   | 4   | 1   |
| Other                                      | 6   | 9   | 11  |
| <b>Airline Seating Area</b>                |   |   |   |
| Economy/Tourist/Coach                      | 78%   | 80%   | 88%   |
| Executive/Business                         | 19  | 16  | 10  |
| First Class                                | 4   | 4   | 2   |
| Total                                      | 100%  | 100%  | 100%  |
| <b>Use of Package</b>                      |   |   |   |
| Yes  | 13%   | 21%   | 30%   |
| No   | 87  | 79  | 70  |
| Total                                      | 100%  | 100%  | 100%  |
| <b>Advance Package Booking</b>             |   |   |   |
| 7 days or less                             | 5%  | 2%  | 2%  |
| 8 - 30 days                                | 32  | 4   | 3   |
| 31 - 60 days                               | 18  | 11  | 10  |
| 61 - 90 days                               | 11  | 8   | 8   |
| 91 - 120 days                              | 11  | 21  | 21  |
| 121 - 180 days                             | 8   | 12  | 13  |
| 6 Months or More                           | 15  | 42  | 43  |
| Total                                      | 100%  | 100%  | 100%  |

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|---|--|--|---|
| <b>Travel Companions**</b>                    |  |  |   |
| Business Associates                           | 12%                                      | 7%                                       | 1%  |
| Family/Relatives                              | 23                                       | 24                                       | 33  |
| Friends                                       | 9  | 12                                       | 16  |
| Spouse  | 25                                       | 39                                       | 54  |
| Tour Group                                    | 2  | 1  | 1   |
| Traveling Alone                               | 41                                       | 33                                       | 18  |
| <b>Average Travel Party Size</b>              | 1.5                                      | 1.6                                      | 1.9   |
| <b>Type of Lodging**</b>                      |  |  |   |
| Hotel / Motel                                 | 78%                                      | 85%                                      | 80%   |
| Private Home                                  | 29                                       | 21                                       | 26  |
| Other   | 3  | 4  | 5   |
| <b>Length of Stay</b>                         |  |  |   |
| Mean Nights in the U.S.                       | 19.2                                     | 15.0                                     | 15.4  |
| Mean Nights in California                     | 10.5                                     | 9.3                                      | 8.9   |
| % of California Nights                        | 55%                                      | 62%                                      | 58%   |
| <b>Prior Visitation to the U.S.</b>           |  |  |   |
| First Trip to the U.S. (% Yes)                | 21%                                      | 13%                                      | 17%   |
| Average Trips to the U.S. in Past Year        | 2.0                                      | 2.2                                      | 1.5   |
| Average Trips to the U.S. in Past 5 Years     | 6.6                                      | 6.9                                      | 3.8   |
| <b>Average Number of States Visited</b>       | 2.0                                      | 1.9                                      | 2.0   |
| <b>Average Number of Destinations Visited</b> | 2.7                                      | 2.7                                      | 3.1   |
| <b>Places Visited in the U.S.**</b>           |  |  |   |
| Los Angeles                                   | 51%                                      | 39%                                      | 40%   |
| San Francisco                                 | 44                                       | 51                                       | 55  |
| Las Vegas                                     | 23                                       | 29                                       | 38  |
| New York City                                 | 15                                       | 11                                       | 11  |
| San Diego                                     | 12                                       | 18                                       | 21  |
| San Jose                                      | 8  | 5  | 1   |
| Anaheim                                       | 8  | 10                                       | 11  |
| Grand Canyon                                  | 4  | 5  | 7   |
| Chicago                                       | 4  | 2  | 3   |
| Yosemite                                      | 3  | 6  | 8   |
| DC Metro Area                                 | 3  | 1  | 0   |
| Seattle                                       | 3  | 2  | 1   |
| Monterey                                      | 3  | 7  | 9   |
| Sacramento                                    | 3  | 5  | 6   |
| Riverside/San Bernardino                      | 2  | 5  | 7   |
| Oahu/Honolulu                                 | 2  | 2  | 3   |
| Miami   | 2  | 1  | 1   |
| Oakland                                       | 2  | 1  | 1   |

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|---|---|---|---|
| <b>Activities Experienced While in the U.S.**</b> |   |   |   |
| Shopping  | 86%   | 88%   | 95%   |
| Dining Out  | 86  | 94  | 96  |
| Sightseeing in Cities                             | 51  | 55  | 67  |
| Historical Places                                 | 37  | 45  | 54  |
| Amusement/Theme Parks                             | 33  | 37  | 47  |
| Visiting Small Towns                              | 31  | 35  | 42  |
| National Parks                                    | 30  | 43  | 56  |
| Touring Countryside                               | 27  | 38  | 47  |
| Cultural Heritage Sites                           | 24  | 38  | 45  |
| Casinos/Gambling                                  | 23  | 30  | 37  |
| Art Gallery/Museum                                | 21  | 21  | 28  |
| Guided Tours                                      | 21  | 33  | 42  |
| <b>Transportation While in the U.S.**</b>         |   |   |   |
| Taxi/Limousine                                    | 41%   | 50%   | 42%   |
| Airlines in U.S.                                  | 38  | 34  | 31  |
| Rented Auto                                       | 36  | 37  | 42  |
| Company or Private Auto                           | 31  | 25  | 30  |
| City Subway/Tram/Bus                              | 21  | 22  | 25  |
| Railroad between Cities                           | 10  | 8   | 10  |
| Bus between Cities                                | 9   | 9   | 9   |
| Motor Home/Camper                                 | 2   | 2   | 2   |
| <b>Spending by Category (Per Visitor/Trip)</b>    |   |   |   |
| Lodging   | \$657   | \$586   | \$386   |
| Food/Beverages                                    | 399   | 393   | 399   |
| Gifts/Souvenirs                                   | 364   | 265   | 289   |
| Transportation in the U.S.                        | 336   | 244   | 205   |
| Entertainment                                     | 194   | 225   | 267   |
| Expenses at the Airport                           | 37  | 30  | 28  |
| Other   | 148   | 105   | 99  |
| <b>Total Spending Per Visitor/Trip</b>            | <b>\$2,135</b>                                | <b>\$1,846</b>                                | <b>\$1,674</b>                                    |
| <b>Visitor Spending in the U.S.</b>               |   |   |   |
| Per Travel Party Per Trip                         | \$3,235                                       | \$3,000                                       | \$3,212   |
| Per Visitor/Trip                                  | 2,135   | 1,846   | 1,674   |
| Per Person Per Day                                | 111   | 123   | 108   |

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|--|---|---|---|
| <b>Payment Method for Trip Expenses</b>    |   |   |   |
| Credit Cards                               | 54%   | 47%   | 34%   |
| Cash                                       | 39  | 38  | 47  |
| Debit Cards                                | 5   | 9   | 11  |
| Travelers Checks                           | 3   | 6   | 9   |
| Total                                      | 100%  | 100%  | 100%  |
| <b>Age</b>                                 |   |   |   |
| Average Age - Males                        | 43.3  | 44.8  | 47.1  |
| Average Age - Females                      | 39.6  | 42.7  | 43.9  |
| <b>Occupation</b>                          |   |   |   |
| Manager/Executive                          | 37%   | 32%   | 20%   |
| Professional/Technical                     | 34  | 32  | 29  |
| Student                                    | 7   | 4   | 4   |
| Clerical/Sales                             | 7   | 8   | 10  |
| Retired                                    | 6   | 13  | 20  |
| Other                                      | 10  | 12  | 17  |
| Total                                      | 100%  | 100%  | 100%  |
| <b>Annual Household Income</b>             |   |   |   |
| Under \$20,000                             | 8%  | 2%  | 2%  |
| \$20,000 - \$39,999                        | 11  | 6   | 9   |
| \$40,000 - \$59,999                        | 13  | 10  | 13  |
| \$60,000 - \$79,999                        | 13  | 12  | 13  |
| \$80,000 - \$99,999                        | 12  | 14  | 14  |
| \$100,000 - \$119,999                      | 10  | 10  | 12  |
| \$120,000 - \$139,999                      | 7   | 9   | 11  |
| \$140,000 - \$159,999                      | 5   | 5   | 2   |
| \$160,000 - \$179,999                      | 3   | 6   | 7   |
| \$180,000 - \$199,999                      | 3   | 6   | 5   |
| \$200,000 and over                         | 16  | 21  | 13  |
| Total                                      | 100%  | 100%  | 100%  |
| Average Annual Income                      | \$101,300                                     | \$124,300                                     | \$108,100   |

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