



International Market Profiles

United Kingdom Report

February 2022

Introduction

In 2019, international visitors accounted for \$28B of California's \$145B in tourism spending. After nearly two years of closed borders to non-essential travel, the November 8th border re-opening marked a significant milestone for the state's travel and tourism industry.

As the industry prepares to welcome increasing numbers of international visitors in 2022 and beyond, Visit California has identified the need to keep a finger on the pulse of the international visitor through this jagged recovery period of ongoing COVID outbreaks, evolving health protocols and safety regulations, and rapidly changing consumer sentiment around travel.

Historically, Visit California compiled Market "Blueprints" on an annual basis which summarized key statistics about each of California's top 14 international markets and the travelers from each country. Much of the data for these profiles was based on the annual Survey of International Air Travelers (SIAT) conducted by NTTO. While the survey is comprehensive, the annual publication does not fit the current need for timely tracking of international markets during this recovery phase.

Replacing the "Blueprints," the International Market Profiles are a new, quarterly deliverable highlighting the size of the opportunity, recent travel activity to the state, and travel consumer sentiment and behavior from 13 of the 14 California target markets.* Visit California's new partnership with YouGov and their bi-weekly consumer tracking service Global Travel Profiles will help the state's travel industry understand sentiment and travel trends specific to California's most important international markets on an ongoing and timely basis.

*Consumer data for South Korea is not currently available from YouGov but is expected to be available at a future date.

Methodology

New to Visit California's research and trends reporting for the industry is a vendor partnership with YouGov and their Global Travel Profiles international consumer tracking service.

Global Travel Profiles tracks travel-related sentiment and behavior for the population age 16+ in 25 markets with over 32,000 surveys per market per year. Panelists are surveyed on preferred destinations, booking methods, accommodation preferences, and COVID-related sentiment.

Visit California will initially report on consumer travel intent to the U.S. as a destination but will soon have the ability through our robust partnership with YouGov to report on California as a destination for key target markets, including Australia, Canada, China, France, Germany, India, Japan, Mexico, Scandinavia, and the UK.

The profile report highlights the following international market insights:

- **Visitation & Spending (Tourism Economics)**
 - Pre-pandemic visitation & spending
 - Visitation & spending forecast through 2026
- **Non-Resident Arrivals to California (NTTO)**
 - Pre-pandemic arrivals
 - Arrivals for past 3 months
- **Airlift to California (Cirium)**
 - Pre-pandemic airlift
 - Non-stop flights for past 3 months
 - Non-stop seats for past 3 months
- **Travel Sentiment & Behavior (YouGov)***
 - Intent to travel to US in the next 12 months
 - Trip type
 - Current barriers to travel
 - Incidence of key traveler segments
 - Vacation planning tools
 - Accommodation preferences and booking methods
 - Anticipated travel dates
 - Number of trips planned
 - Travel party composition
 - Global benchmark average across 13 California markets

*Future reports will include COVID-related sentiment and travel spending.



United Kingdom



Visitation & Spending

Arrivals

Airlift

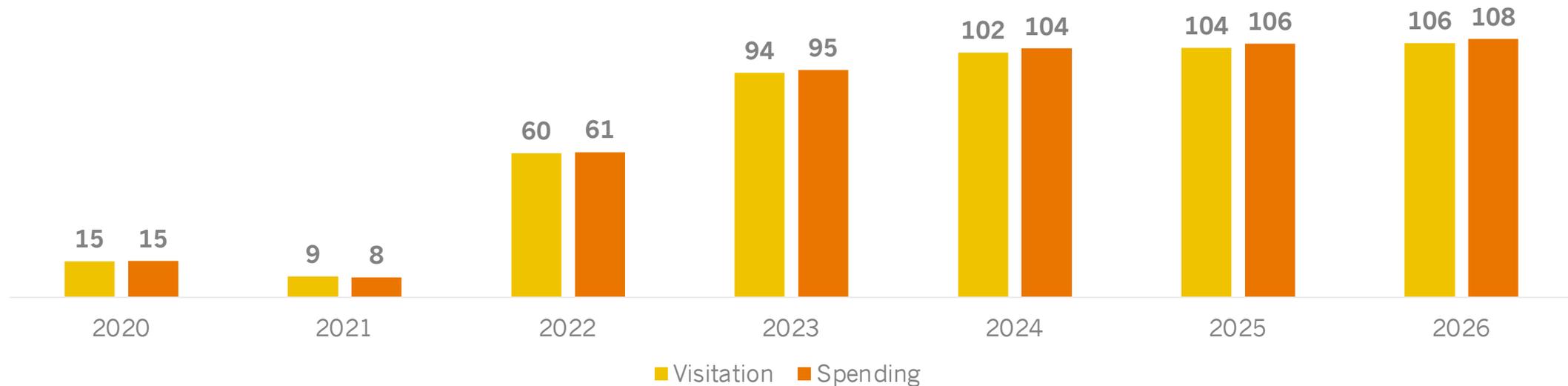


Visitation & Spending Forecast

- The following charts show pre-pandemic (2019) visitation and spending in California and the forecast through 2026.

2019 Travel (Pre-Pandemic)	Visitation (Trips)	Spending (\$)
UK	754K	\$1.4B

Visitation & Spending Forecast
(Indexed to 2019 levels)



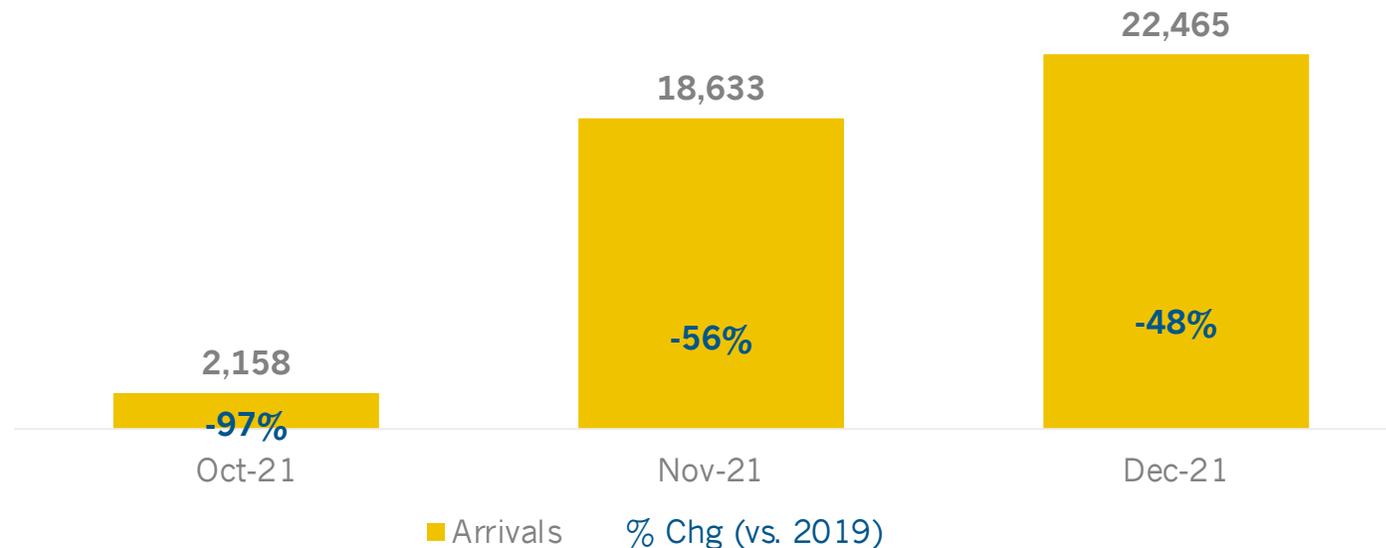


Non-Resident Arrivals to California

- The following chart shows non-resident arrivals at California ports of entry for the most recent 3 months.

2019 Travel (Pre-Pandemic)	Annual Arrivals
UK	613K

Non-Resident Arrivals to California Ports of Entry (Q4-2021)



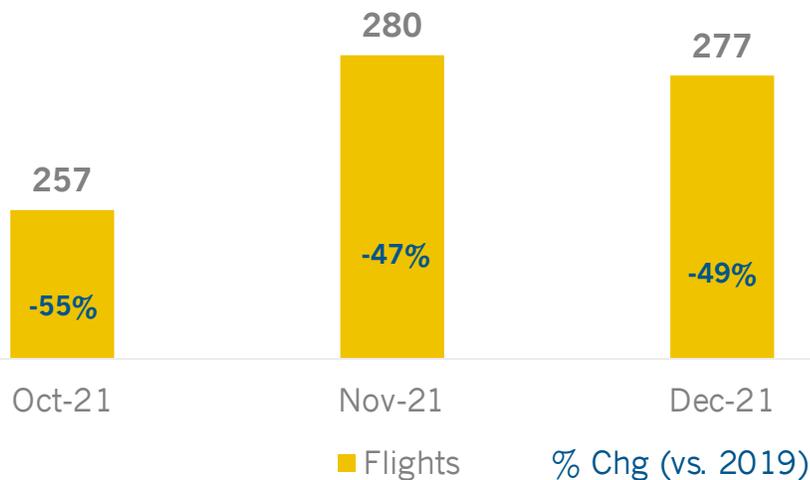


Airlift into California

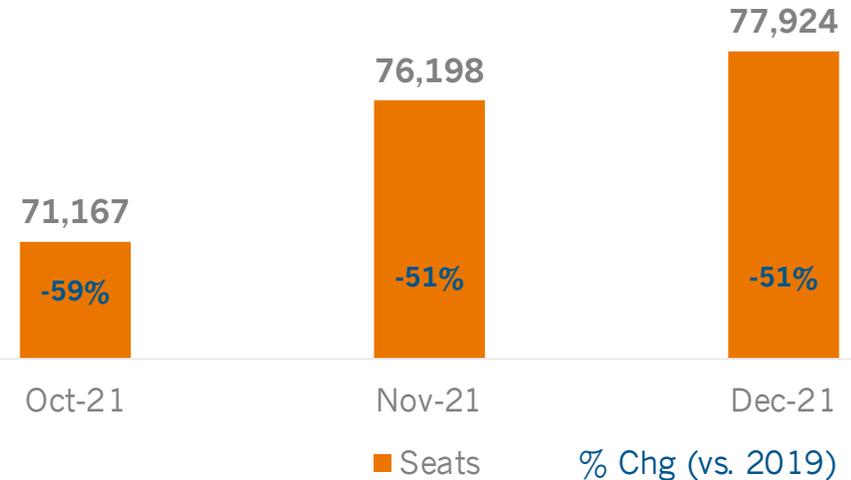
- The charts below show monthly non-stop flights and seats into California airports.

2019 Travel (Pre-Pandemic)	Monthly Non-Stop Flights	Monthly Non-Stop Seats
UK	564	167K

Non-Stop Flights (Q4-2021)



Non-Stop Seats (Q4-2021)



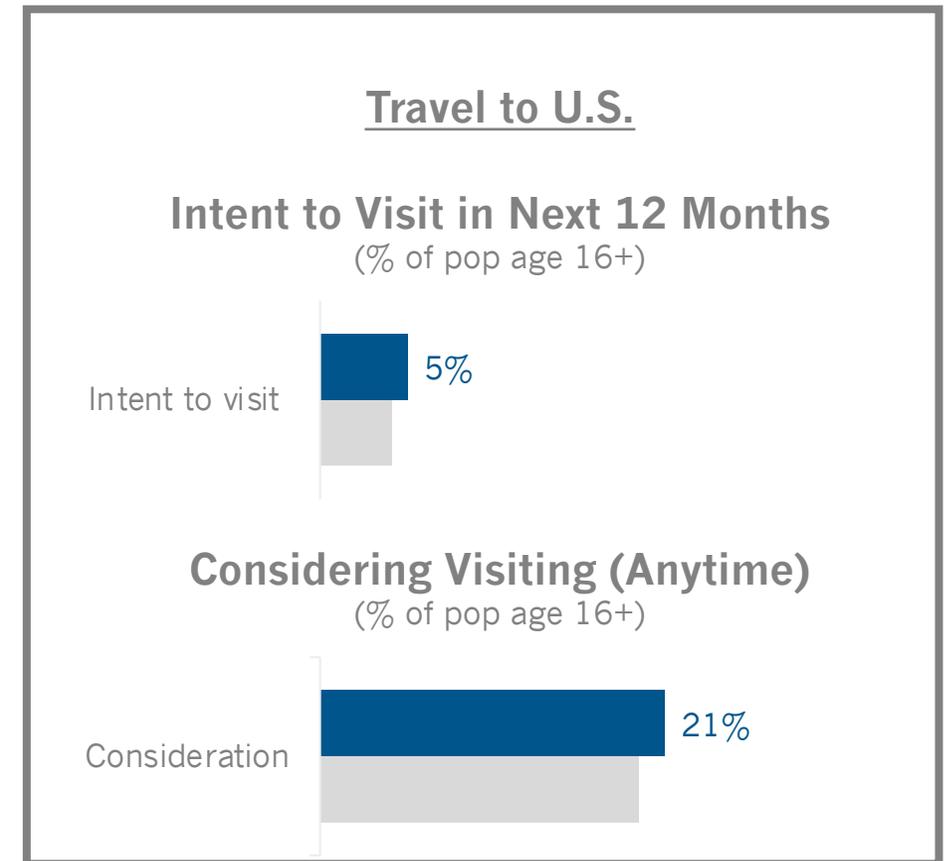
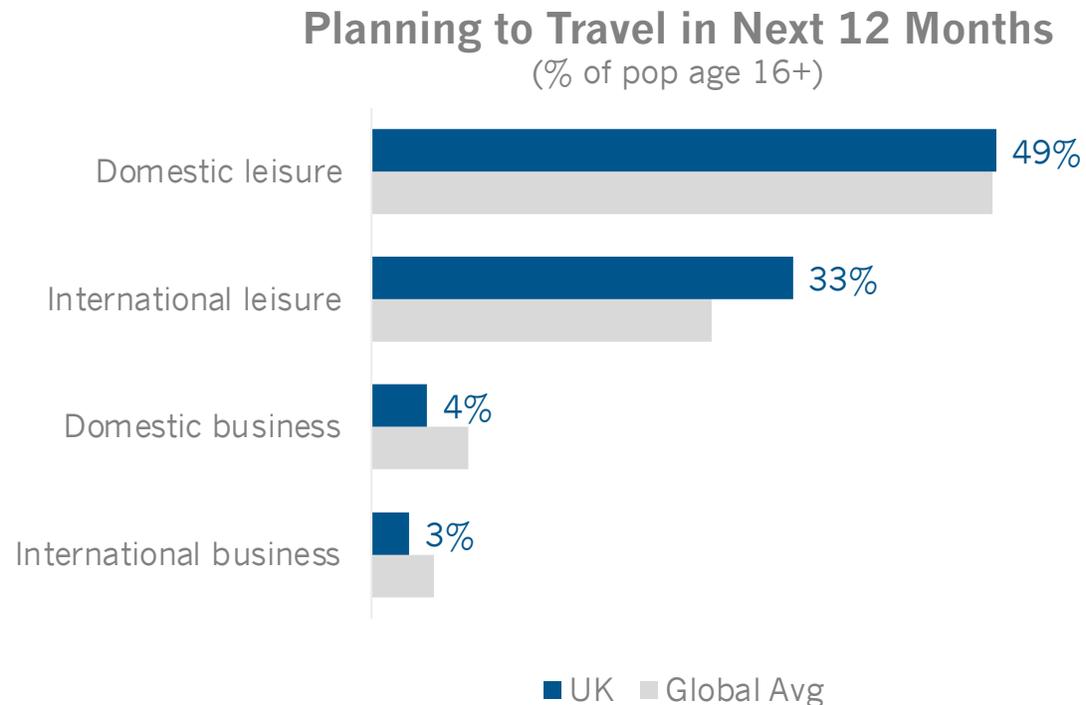


Consumer Data: Travel Planned



Travel Planning in Next 12 Months

- The left chart shows trip types planned in the next 12 months among the total population surveyed.
- The charts on the right show intent to visit the U.S. in the next 12 months and consideration to visit in the future.



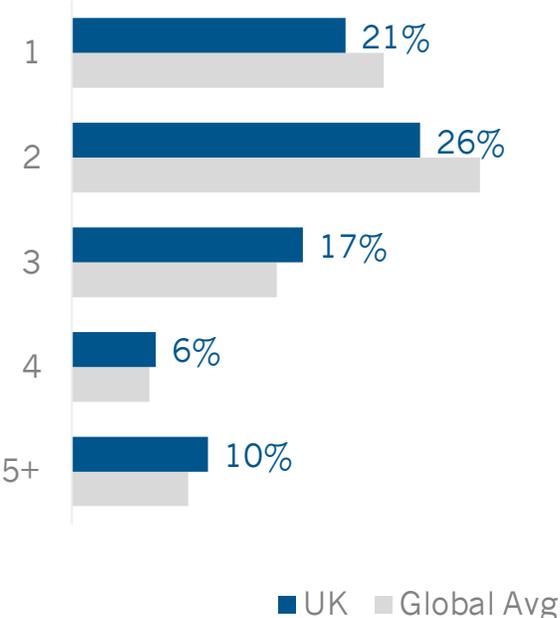


Number of Trips and Timing

- The charts below show the number of trips (leisure and business) consumers have planned in the next 12 months and the month of a “main” vacation.

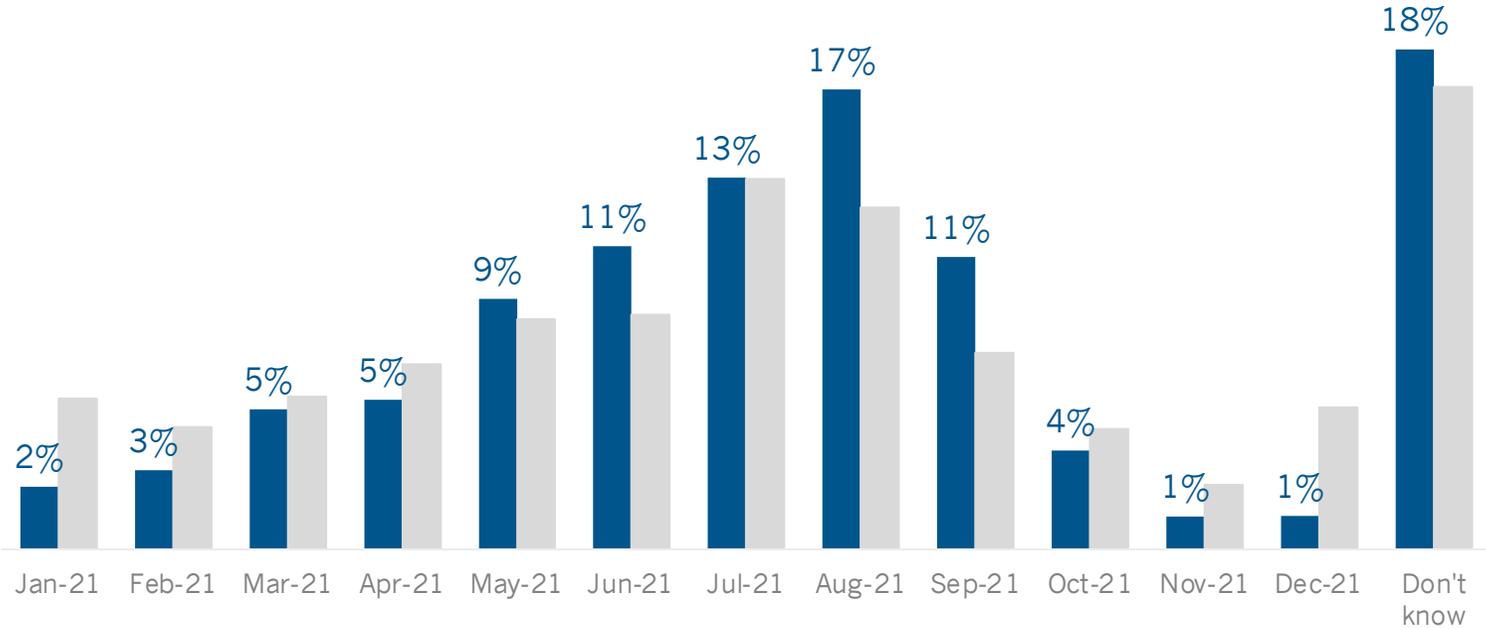
Number of Trips

(% among planning to travel in next 12 months)



Timing of Primary Vacation

(% among planning to travel in next 12 months)

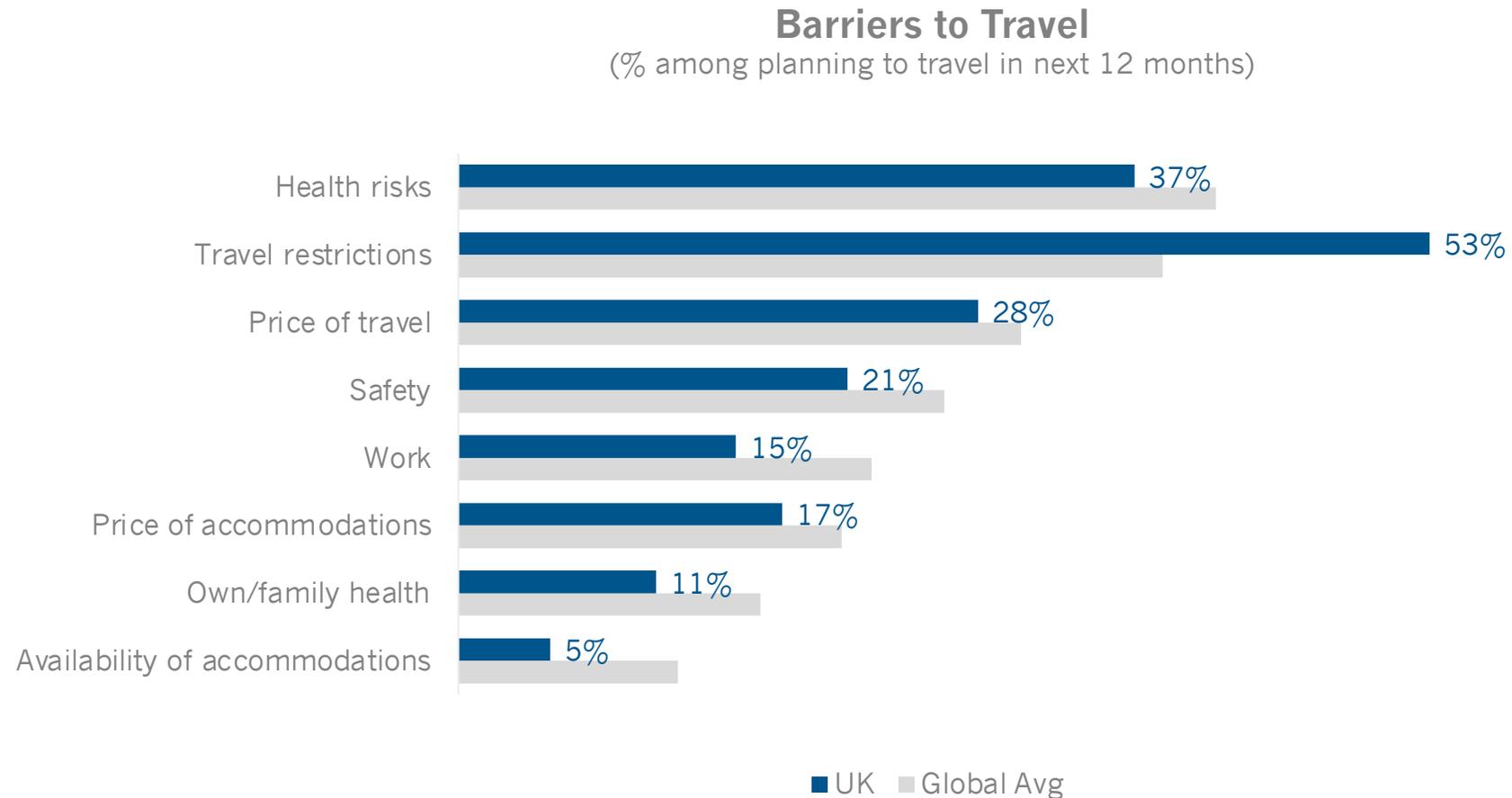


Q: How many trips, if any, are you planning to take for leisure, business or personal reasons in the next 12 months?
 Q: In which, if any, of the following months are you planning to go on your MAIN vacation for 2022 (or when did you go if you have been already)? Please choose the month when you expect to be starting/started your MAIN vacation.



Barriers to Travel

- The chart below shows consumers perceptions of current barriers to travel.

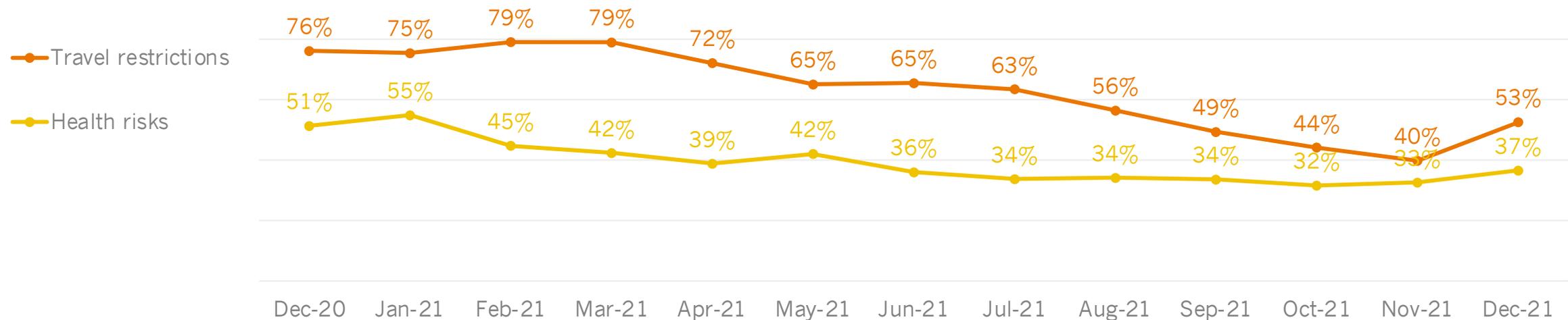




Barriers to Travel

- The chart below shows consumers perceptions of health-related barriers trended over time.

Barriers to Travel
(% among planning to travel in next 12 months)





Consumer Data: Travel Preferences

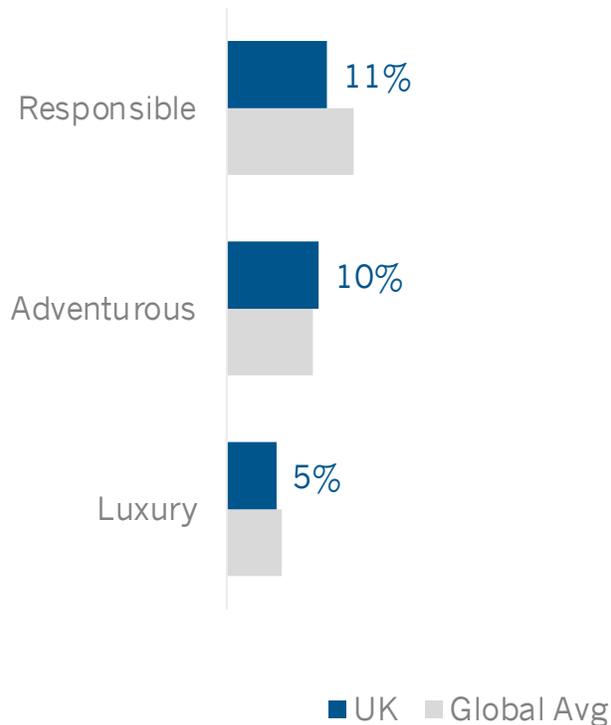


Traveler/Holiday Types

- The charts show traveler types and preferences.

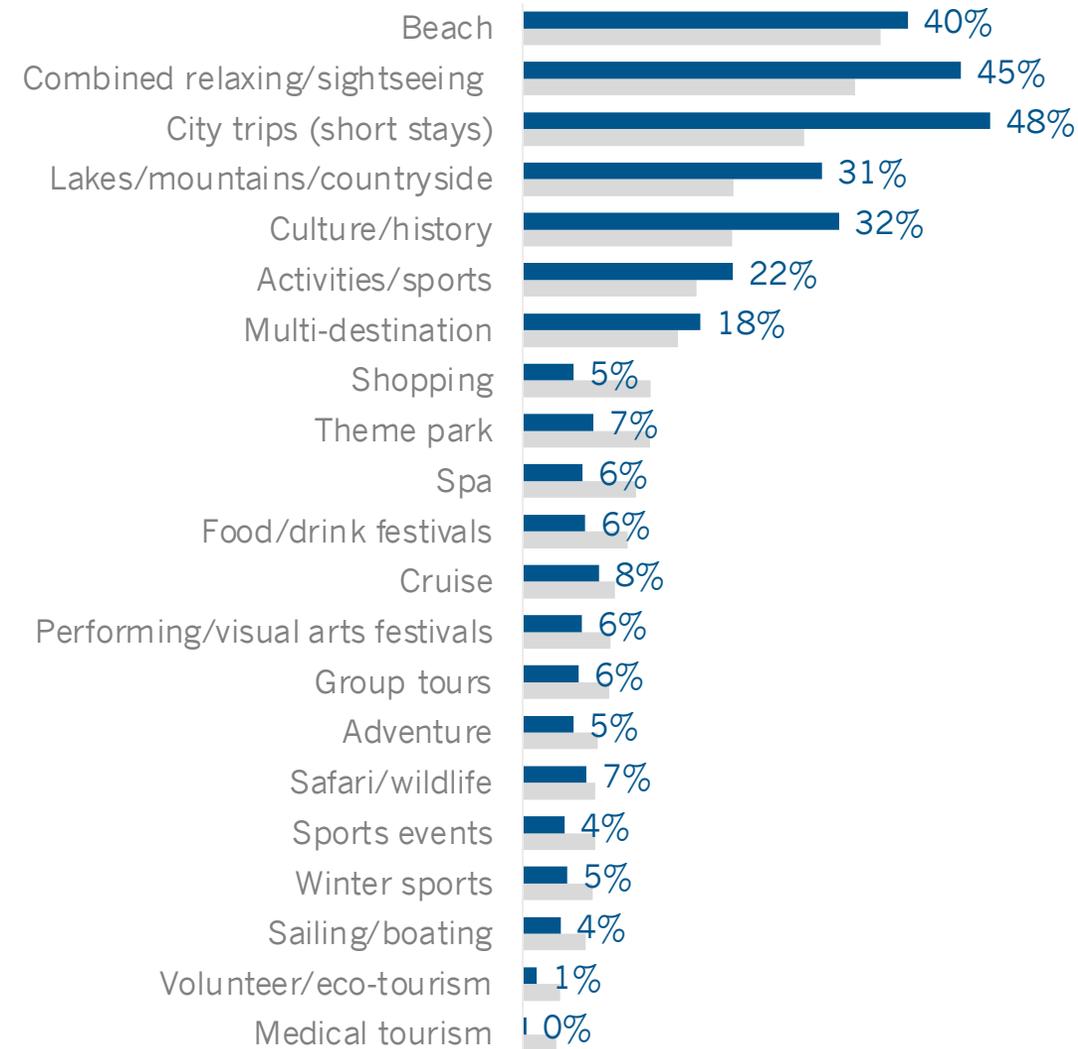
Traveler Types

(% among planning to travel in next 12 months)



Holiday Types

(% among planning to travel in next 12 months)



Q: Which, if any, of the following trips are you planning to take in the next 12 months?

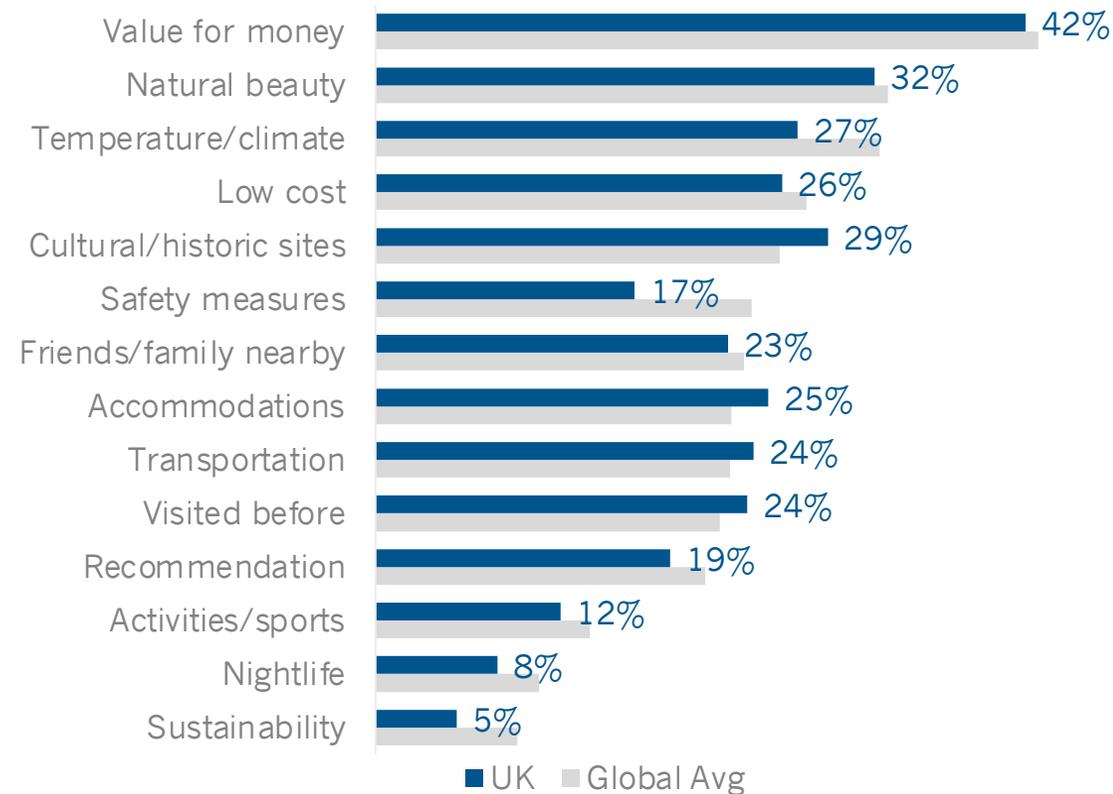
Q: Thinking more generally about the holidays that you go on, not just those that you have taken in the last 12 months, which, if any, of the following types of holidays do you typically take?



Destination Selection

- The chart below shows what influenced the destination decision on the most recent leisure trip.

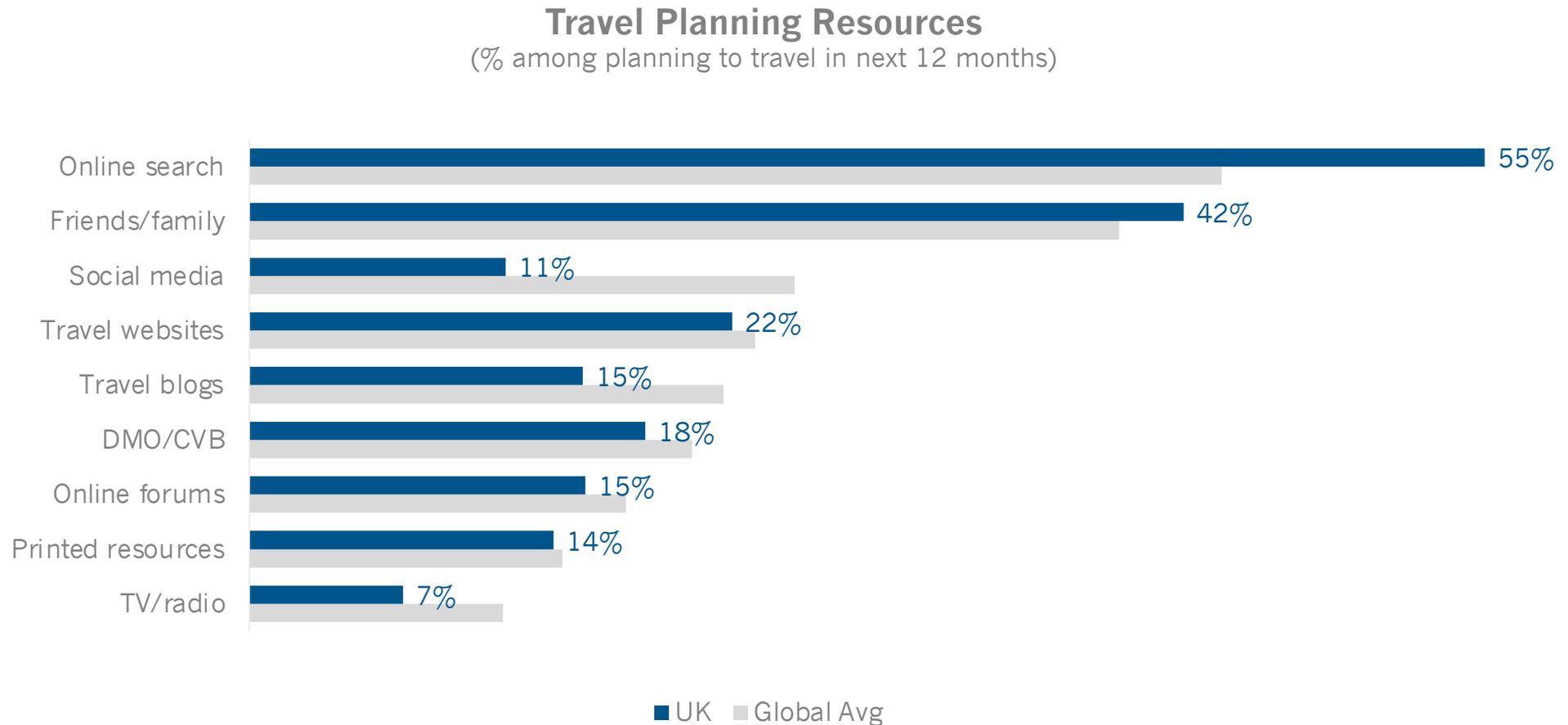
Influence on Destination Selection
(% among planning to travel in next 12 months)





Planning Resources

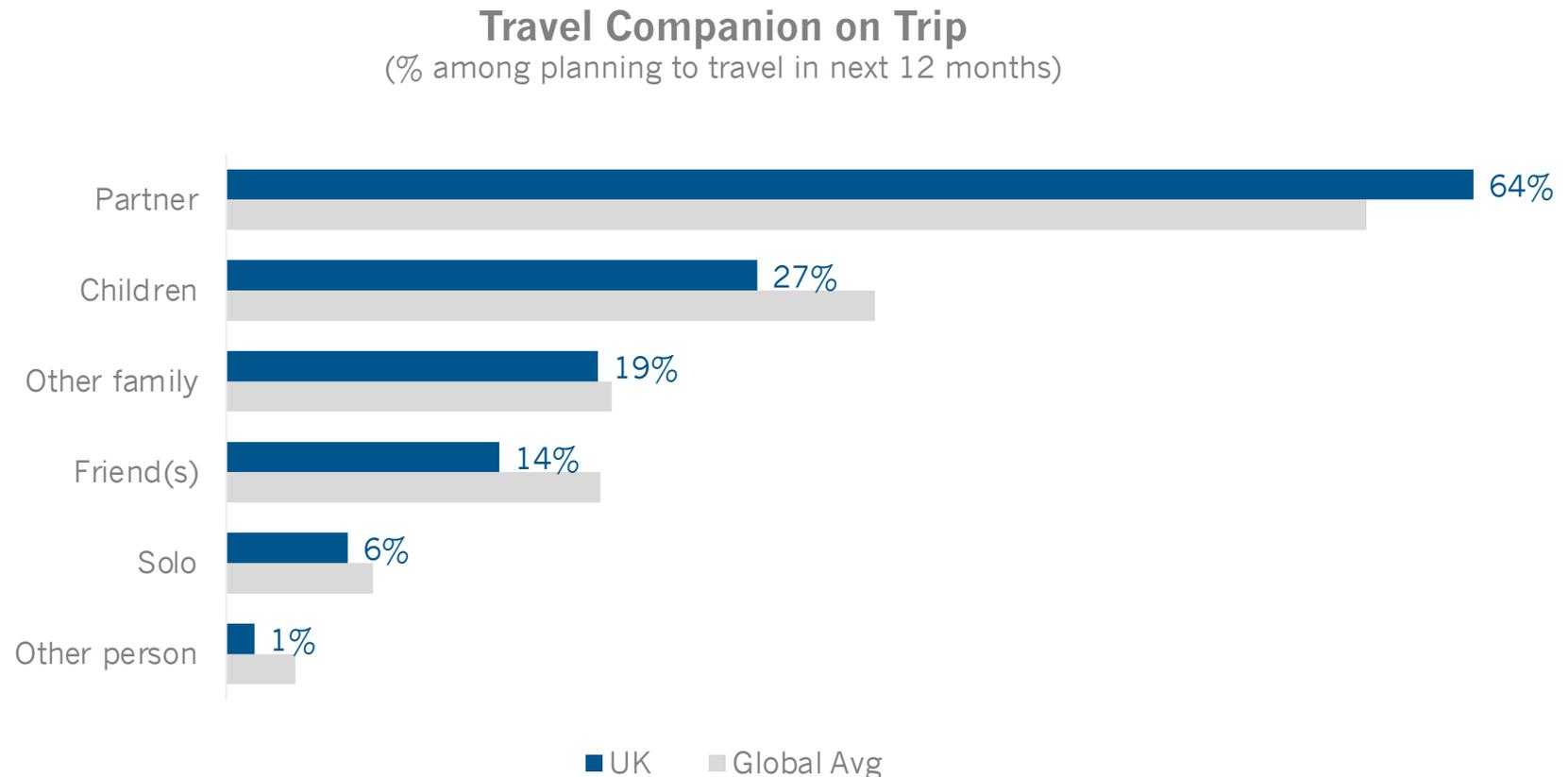
- The chart below shows what resources consumers use for planning a leisure trip.





Travel Companions

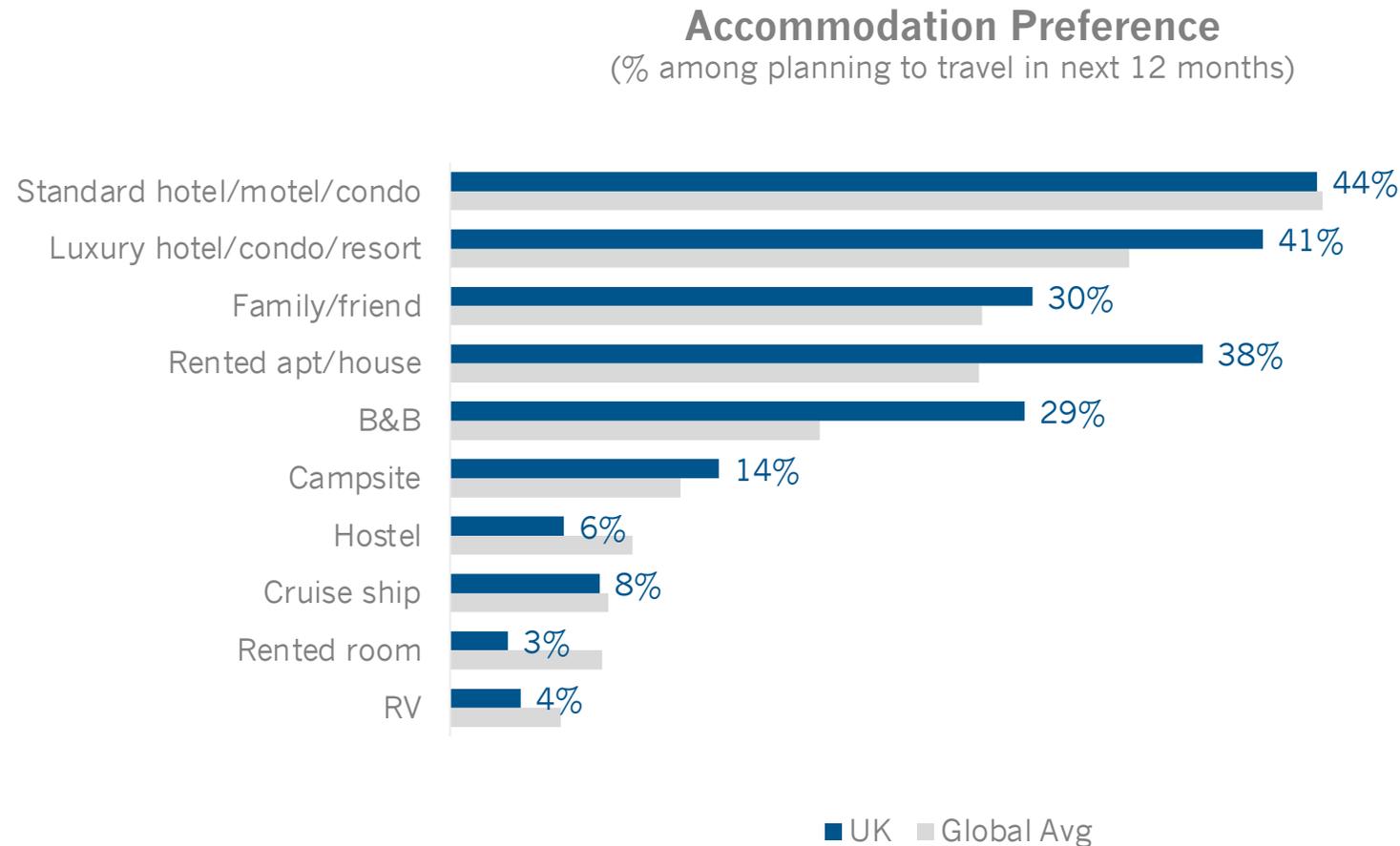
- The chart below shows travel companions on the most recent leisure trip. While the question is specific to one trip, the responses may provide general insights on typical travel companions for a vacation.





Accommodation Preference

- The chart below shows typical accommodation preferences for a leisure trip.





Accommodation Booking

- The chart below shows typical methods for booking a leisure trip.

