

CHARACTERISTICS OF TRAVELERS FROM IRELAND TO CALIFORNIA - 2013

Ireland was one of California's smaller overseas markets with approximately 88,000 visitors to California in 2013. Collectively visitors from Ireland spent approximately \$186 million in California.

Irish visitors to California during 2013 reported spending \$180 per day during an 11.7 night average stay or approximately \$2,110 per visitor. The average spending for all overseas visitors to California was about \$1,940 (\$159 per day; 12.2 nights in California).

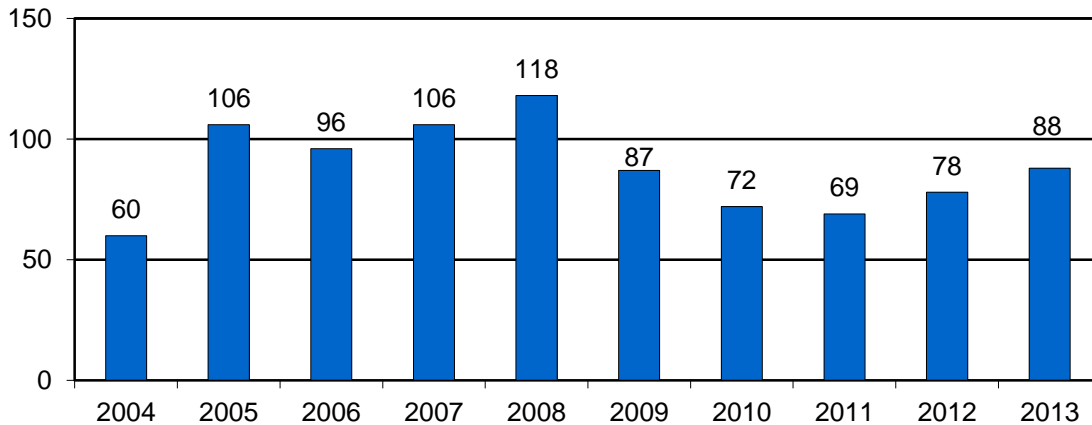
Visitors from Ireland

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2003	254,320	22.8%	58,000
2004	345,119	17.4%	60,000
2005	383,400	27.6%	106,000
2006	414,423	23.2%	96,000
2007	491,055	21.6%	104,000
2008	531,198	22.2%	118,000
2009	411,203	21.2%	87,000
2010	360,492	20.0%	72,000
2011	346,879	19.9%	69,000
2012	331,850	23.5%	78,000
2013	367,110	24.0%	88,000

1) U.S. Dept of Homeland Security, I-94 International Arrival Records.

2) U.S. Dept. of Commerce, National Travel and Tourism Office, Survey of International Air Travelers.

Number of Visitors from Ireland to CA, 2004-2013 (in 000s)



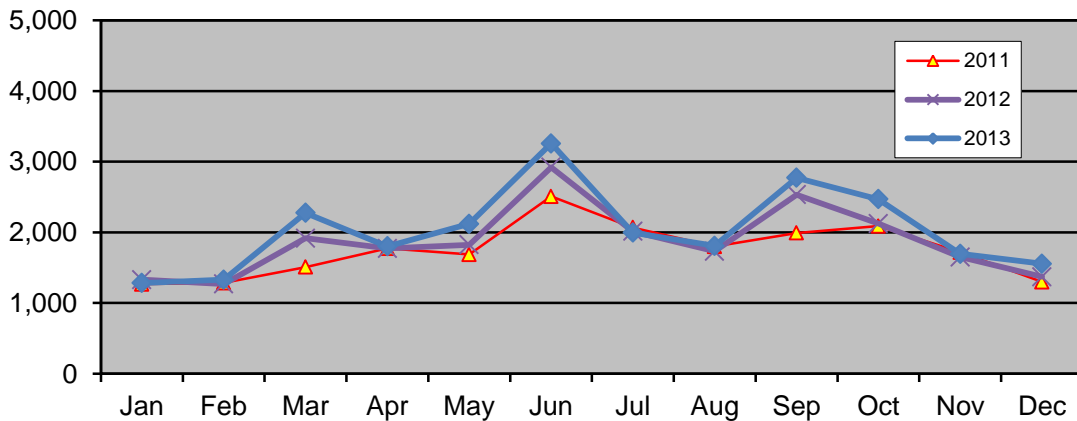
Source: U.S. Dept. of Commerce, NTTO, Survey of International Air Travelers.

The volume of visitors to California from Ireland has fluctuated over the past 10 years, reaching a peak in 2008 of 118,000 visitors with a market share of 22.2%. California's volume of visitors from Ireland increased to 88,000 in 2013 compared with 78,000 in 2012. The market share of Irish visitors to California increased slightly from 23.5% in 2012 to 24.0% in 2013.

Irish Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Ireland to California were similar in 2013 compared with 2012 and 2011. During 2013, Irish resident arrivals at California ports-of-entry peaked in June and September. The lowest volumes were recorded in January, February, and December.

**Residents of Ireland
Monthly Port of Entry Arrivals to CA
2011-2013**



Source: U.S. Department of Homeland Security, I-94 International Arrival Records.
CIC Research, Inc.

Comparisons with Overseas Visitors

Detailed trip and traveler characteristics of visitors from Ireland 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 Ireland are more likely to:

- Choose an airline based on convenient schedule
- Travel alone
- Visit San Francisco as part of their U.S. trip
- Visit cultural/ethnic heritage sites, go on guided tours, visit national parks/monuments, or small towns/countryside.
- Use taxis or limousines, city subways/trams/buses, or a rented bicycle/motorcycle/moped for transportation in the U.S.
- Spend less while in the U.S.
- Pay for trip expenses with a cash advance/withdrawal using a debit card
- Have a lower average age amongst male visitors
- Be a student
- Have a higher average annual income

Conversely, visitors from Ireland are less likely to:

- Use information from a personal recommendation to plan their trip
- Choose an airline based on non-stop flights
- Make use of an inclusive tour package
- Be on their first trip to the U.S.
- Visit Los Angeles as part of their U.S. trip
- Spend their money in the U.S., including on gifts/souvenirs
- Pay for trip expenses with a credit card

Characteristics of Travelers from Ireland to California, 2013

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Ireland (n = 118)	Leisure Visitors from Ireland (n = 79)***
Primary Purpose of Trip			
Vacation/Holidays	52%	47%	70%
Visit Friends/Relatives	17%	20%	30%
Business	15%	12%	-
Convention/Conference	9%	12%	-
Other Purpose	8%	10%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	64%	67%	83%
Visit Friends/Relatives	32%	34%	50%
Business	20%	20%	2%
Convention/Conference	12%	11%	-
Sources Used to Plan Trip**			
Airline	43%	45%	55%
Online Travel Agency	31%	32%	34%
Travel Agency Office	26%	34%	39%
Personal Recommendation	26%	10%	15%
Travel Guide	15%	12%	16%
Corporate Travel Department	14%	13%	2%
Tour Operator/Travel Club	9%	13%	20%
National/State/City Travel Office	8%	4%	6%
Advance Planning for Trip			
7 days or less	5%	12%	12%
8 - 30 days	27%	16%	16%
31 - 60 days	17%	15%	16%
61 - 90 days	14%	14%	18%
More than 3 Months	36%	43%	39%
Total	100%	100%	100%
Average Planning Time in Days	105 days	98 days	103 days
Advance Airline Reservations			
7 days or less	10%	15%	13%
8 - 30 days	35%	22%	26%
31 - 60 days	17%	21%	20%
61 - 90 days	13%	9%	11%
91 - 120 days	8%	14%	12%
121 - 180 days	9%	9%	14%
6 Months or More	7%	10%	5%
Total	100%	100%	100%
Average Booking in Days	72 days	76 days	74 days

* Overseas visitors to the U.S. do not include visitors from Canada or Mexico.

** Multiple response question. The column may sum to more than 100%.

***Caution – Small sample size

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

**Characteristics of Travelers from Ireland to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Ireland (n = 118)	Leisure Visitors from Ireland (n = 79)***
Means of Booking Air Trip**			
Travel Agency Office	31%	29%	30%
Airlines Directly	28%	35%	40%
Internet Booking Service	24%	24%	25%
Corporate Travel Department	15%	15%	4%
Tour Operator/Travel Club	9%	7%	10%
Other	2%	-	-
Main Factor in Selecting Airline			
Airfare	29%	35%	45%
Non-Stop Flights	17%	6%	8%
Convenient Schedule	15%	27%	17%
Mileage Bonus/Frequent Flyer Program	9%	9%	-
Previous Good Experience	9%	13%	19%
Safety Reputation	6%	2%	3%
Loyalty to Carrier	4%	1%	-
Employer policy	3%	1%	-
In-flight Service Reputation	3%	4%	6%
On-time Reputation	2%	-	-
Other	4%	2%	2%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	79%	81%	81%
Executive/Business	10%	11%	9%
Premium Economy	10%	8%	10%
First Class	1%	-	-
Total	100%	100%	100%
Use of Package			
Yes	15%	8%	11%
No	85%	92%	89%
Total	100%	100%	100%
Travel Package Includes**			
Airfare and Accommodation Only	3%	1%	2%
Attractions/Events/Entertainment	7%	<1%	<1%
Bus/Coach	7%	6%	9%
Cruise	2%	1%	1%
Guided Tours	6%	1%	1%
Meals	6%	1%	1%
Recreation	1%	-	-
Rental Car	5%	-	-
Tour Guide for Entire Trip	4%	<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.

***Caution – Small sample size

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

**Characteristics of Travelers from Ireland to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Ireland (n = 118)	Leisure Visitors from Ireland (n = 79)***
Travel Companions**			
Traveling Alone	61%	70%	48%
Spouse/Partner	21%	16%	29%
Family/Relatives	13%	9%	17%
Friends	6%	8%	14%
Business Associates	4%	1%	-
Tour Group	1%	-	-
Average Travel Party Size	1.6	1.4	1.8
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	79%	69%
Private Home	27%	25%	34%
Other	6%	-	-
Length of Stay			
Mean Nights in the U.S.	22.5 nights	24.6 nights	17.0 nights
Mean Nights in California	12.2 nights	11.7 nights	11.8 nights
% of California Nights	54%	48%	69%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	13%	9%
Average Trips to the U.S. in Past Year	1.7 trips	1.6 trips	1.6 trips
Average Number of States Visited	2.0 states	1.9 states	1.7 states
Average Number of Destinations Visited	3.0 dest.	2.8 dest.	2.7 dest.
Places Visited in the U.S.**			
Los Angeles	59%	32%	34%
San Francisco	47%	57%	61%
Las Vegas	30%	24%	19%
New York City	16%	20%	22%
San Diego	13%	14%	11%
Anaheim-Santa Ana	8%	14%	8%
Flagstaff-Grand Canyon-Sedona	7%	3%	5%
San Jose	6%	7%	2%
DC Metro Area	4%	2%	2%
Monterey-Salinas	4%	5%	9%
Oahu	4%	11%	18%
Santa Barbara	3%	7%	9%
Riverside/San Bernardino	3%	3%	4%
Chicago	3%	10%	7%
Seattle	3%	1%	1%
Sacramento	3%	2%	3%
Miami	3%	-	-

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**Characteristics of Travelers from Ireland to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Ireland (n = 118)	Leisure Visitors from Ireland (n = 79)***
Activities Experienced While in the U.S.**			
Shopping	88%	95%	99%
Sightseeing	84%	80%	90%
National Parks/Monuments	49%	63%	77%
Experience Fine Dining	43%	47%	66%
Small Towns/Countryside	41%	54%	55%
Amusement/Theme Parks	38%	32%	44%
Historical Locations	37%	41%	50%
Guided Tours	33%	43%	51%
Art Gallery/Museums	30%	34%	28%
Casino/Gamble	25%	31%	29%
Cultural/Ethnic Heritage Sites	21%	34%	32%
Concert/Play/Musical	20%	27%	38%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	46%	54%	57%
Rented Auto	43%	39%	32%
Auto, Private or Company	37%	42%	37%
City Subway/Tram/Bus	33%	53%	43%
Taxicab/Limousine	33%	51%	49%
Bus between Cities	18%	20%	13%
Ferry/River Taxi/Srt. Scenic Cruise	12%	17%	22%
Railroad between Cities	8%	2%	4%
Rented Bicycle/Motorcycle/Moped	5%	26%	19%
Cruise Ship/River Boat 1+ Nights	4%	5%	5%
Motor Home/Camper	2%	2%	-
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,577	\$2,260	\$4,962
Per Visitor Per Day (CA)	\$159	\$180	\$292
Per Visitor/Trip (California)	\$1,940	\$2,110	\$3,444
Spending by Category (Per Visitor/Trip)			
Accommodations	29.1%	33.5%	25.1%
Air Transportation in the U.S.	6.9%	3.7%	4.4%
Entertainment	12.2%	18.0%	19.1%
Food/Beverages	17.8%	19.5%	20.9%
Gifts/Souvenirs	21.9%	16.6%	20.2%
Ground Transportation in the U.S.	5.6%	5.9%	6.6%
Other	6.3%	2.8%	3.7%

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*** 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 Ireland to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Ireland (n = 118)	Leisure Visitors from Ireland (n = 79)**
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	34%	31%
Cash from Home/Travelers Checks	26%	20%	22%
Cash Adv./Withdrawal Using Credit Card	18%	25%	24%
Cash Adv./Withdrawal Using Debit Card	7%	17%	20%
Purchases Using Debit Card	6%	5%	4%
Total	100%	100%	100%
Age			
Average Age - Males	42 years	33 years	35 years
Average Age - Females	39 years	35 years	39 years
Occupation			
Mgmt., Business, Science, & Arts	44%	45%	41%
Service Occupations	11%	9%	11%
Student	11%	27%	22%
Sales and Office	10%	4%	6%
Retired	8%	4%	6%
Homemaker	5%	2%	3%
Prod., Trans., & Material Moving	4%	2%	2%
Military/Government	4%	3%	1%
Nat. Res., Const., & Maintenance	3%	3%	5%
Other	2%	2%	3%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	4%	5%
\$20,000 - \$39,999	14%	12%	20%
\$40,000 - \$59,999	14%	25%	22%
\$60,000 - \$79,999	12%	9%	4%
\$80,000 - \$99,999	10%	13%	7%
\$100,000 - \$119,999	8%	6%	5%
\$120,000 - \$139,999	6%	10%	12%
\$140,000 - \$159,999	5%	6%	10%
\$160,000 - \$179,999	3%	-	-
\$180,000 - \$199,999	3%	3%	4%
\$200,000 and over	12%	11%	12%
Total	100%	100%	100%
Average Annual Income	\$100,889	\$127,661	\$139,033

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**Caution – Small sample size

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