

CHARACTERISTICS OF TRAVELERS FROM IRELAND TO CALIFORNIA - 2014

Ireland was one of California’s smaller overseas markets with approximately 121,000 visitors to California in 2014. Collectively visitors from Ireland spent approximately \$210 million in California.

Irish visitors to California during 2014 reported spending \$127 per day during a 13.7 night average stay or approximately \$1,736 per visitor. The average spending for all overseas visitors to California was about \$1,872 (\$153 per day; 12.2 nights in California).

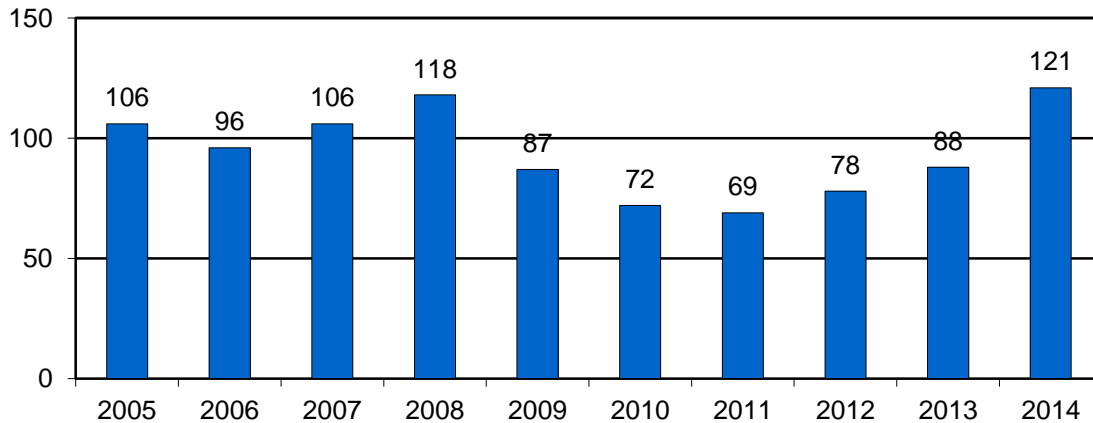
Visitors from Ireland

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
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
2014	395,037	30.6%	121,000

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, 2005-2014 (in 000s)



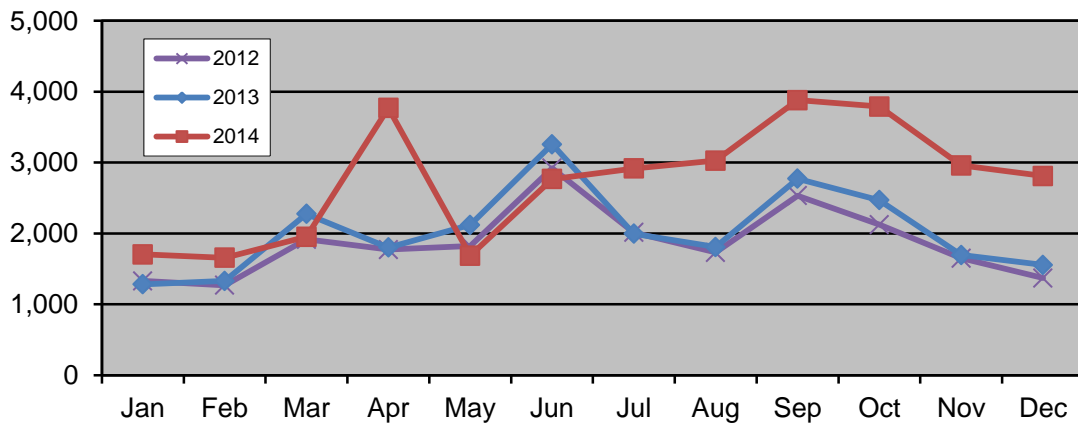
Sources: U.S. Dept. of Commerce, NTTO, Survey of International Air Travelers, Revised by Tourism Economics for Visit California (October, 2015).

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 a new peak of 121,000 in 2014 compared with 88,000 in 2013. The market share of Irish visitors to California increased from 24.0% in 2013 to 30.6% in 2014.

Irish Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Ireland to California were higher in April and during the last half of 2014 compared with 2013 and 2012. During 2014, Irish resident arrivals at California ports-of-entry peaked in April and September. The lowest volumes were recorded in January, February, and May.

**Residents of Ireland
Monthly Port of Entry Arrivals to CA
2012-2014**



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

- Use information from the airline to plan their trip
- Make their airline reservation longer in advance
- Choose an airline based on convenient schedule
- Travel alone
- Visit San Francisco as part of their U.S. trip
- Visit national parks/monuments or small towns/countryside, as well as go on guided tours or experience fine dining.
- Make use of air travel between U.S. cities, taxis or limousines, city subways/trams/ buses, or a rented bicycle/motorcycle/moped for transportation 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:

- Make use of 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
- Spend per visitor per day in California
- Pay for trip expenses with a credit card

Characteristics of Travelers from Ireland to California, 2014

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Ireland (n = 171)	Leisure Visitors from Ireland (n = 115)
Primary Purpose of Trip			
Vacation/Holidays	54%	50%	69%
Visit Friends/Relatives	18%	23%	31%
Business	13%	12%	-
Convention/Conference	8%	8%	-
Other Purpose	7%	7%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	66%	67%	77%
Visit Friends/Relatives	34%	38%	45%
Business	18%	17%	2%
Convention/Conference	12%	8%	3%
Sources Used to Plan Trip**			
Airline	43%	52%	60%
Online Travel Agency	32%	35%	31%
Travel Agency Office	25%	25%	28%
Personal Recommendation	29%	15%	17%
Travel Guide	15%	9%	11%
Corporate Travel Department	12%	10%	3%
Tour Operator/Travel Club	10%	11%	15%
National/State/City Travel Office	8%	2%	3%
Advance Planning for Trip			
7 days or less	5%	9%	9%
8 - 30 days	25%	16%	14%
31 - 60 days	19%	16%	16%
61 - 90 days	15%	16%	20%
More than 3 Months	36%	44%	42%
Total	100%	100%	100%
Average Planning Time in Days	106 days	104 days	109 days
Advance Airline Reservations			
7 days or less	9%	11%	10%
8 - 30 days	35%	20%	19%
31 - 60 days	19%	20%	19%
61 - 90 days	12%	15%	18%
91 - 120 days	8%	11%	10%
121 - 180 days	10%	12%	14%
6 Months or More	8%	12%	11%
Total	100%	100%	100%
Average Booking in Days	74 days	85 days	87 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%.

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

**Characteristics of Travelers from Ireland to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Ireland (n = 171)	Leisure Visitors from Ireland (n = 115)
Means of Booking Air Trip**			
Travel Agency Office	29%	21%	20%
Airlines Directly	29%	32%	37%
Internet Booking Service	27%	29%	31%
Corporate Travel Department	12%	13%	4%
Tour Operator/Travel Club	10%	12%	13%
Other	1%	-	-
Main Factor in Selecting Airline			
Airfare	31%	34%	32%
Non-Stop Flights	19%	8%	10%
Convenient Schedule	14%	23%	20%
Mileage Bonus/Frequent Flyer Program	8%	10%	6%
Previous Good Experience	6%	11%	15%
Safety Reputation	6%	3%	6%
Loyalty to Carrier	3%	3%	3%
Employer policy	3%	2%	-
In-flight Service Reputation	2%	2%	7%
On-time Reputation	2%	-	-
Other	5%	3%	4%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	83%	82%	85%
Executive/Business	9%	6%	5%
Premium Economy	8%	12%	11%
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	7%	1%	1%
Attractions/Events/Entertainment	6%	1%	2%
Bus/Coach	6%	5%	7%
Cruise	6%	<1%	1%
Guided Tours	5%	2%	3%
Meals	4%	1%	1%
Recreation	2%	-	-
Rental Car	2%	-	5%
Tour Guide for Entire Trip	2%	<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 Ireland to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Ireland (n = 171)	Leisure Visitors from Ireland (n = 115)
Travel Companions**			
Traveling Alone	59%	66%	49%
Spouse/Partner	22%	20%	33%
Family/Relatives	15%	10%	15%
Friends	6%	6%	9%
Business Associates	3%	2%	1%
Tour Group	1%	-	-
Average Travel Party Size	1.7	1.5	1.8
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	70%	61%
Private Home	30%	33%	43%
Other	6%	<1%	-
Length of Stay			
Mean Nights in the U.S.	23.4 nights	23.6 nights	17.9 nights
Mean Nights in California	12.2 nights	13.6 nights	12.9 nights
% of California Nights	52%	58%	72%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	27%	11%	7%
Average Trips to the U.S. in Past Year	1.7 trips	1.7 trips	1.7 trips
Average Number of States Visited	2.1 states	1.9 states	1.8 states
Average Number of Destinations Visited	3.1 dest.	2.8 dest.	2.7 dest.
Places Visited in the U.S.**			
Los Angeles	62%	39%	41%
San Francisco	44%	53%	58%
Las Vegas	29%	22%	21%
New York City	16%	14%	16%
San Diego	14%	18%	15%
Anaheim-Santa Ana	8%	11%	5%
Flagstaff-Grand Canyon-Sedona	7%	5%	8%
San Jose	6%	5%	1%
DC Metro Area	5%	2%	3%
Monterey-Salinas	4%	7%	9%
Oahu	4%	8%	12%
Santa Barbara	4%	5%	7%
Riverside/San Bernardino	3%	2%	2%
Chicago	3%	9%	4%
Seattle	3%	<1%	1%
Sacramento	3%	2%	1%
Miami	3%	1%	1%

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

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

**Characteristics of Travelers from Ireland to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Ireland (n = 171)	Leisure Visitors from Ireland (n = 115)
Activities Experienced While in the U.S.**			
Shopping	89%	94%	97%
Sightseeing	83%	82%	89%
National Parks/Monuments	52%	65%	73%
Experience Fine Dining	44%	53%	61%
Small Towns/Countryside	43%	55%	56%
Amusement/Theme Parks	40%	35%	43%
Historical Locations	35%	43%	45%
Guided Tours	33%	42%	47%
Art Gallery/Museums	31%	33%	29%
Casino/Gamble	24%	30%	33%
Cultural/Ethnic Heritage Sites	21%	29%	27%
Concert/Play/Musical	20%	26%	33%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	45%	54%	56%
Rented Auto	44%	40%	34%
Auto, Private or Company	38%	43%	44%
City Subway/Tram/Bus	31%	46%	36%
Taxicab/Limousine	31%	45%	41%
Bus between Cities	19%	16%	11%
Ferry/River Taxi/Srt. Scenic Cruise	10%	15%	14%
Railroad between Cities	7%	9%	6%
Rented Bicycle/Motorcycle/Moped	5%	16%	10%
Cruise Ship/River Boat 1+ Nights	4%	5%	5%
Motor Home/Camper	2%	2%	2%
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,590	\$1,860	\$3,935
Per Visitor Per Day (CA)	\$153	\$127	\$167
Per Visitor/Trip (California)	\$1,872	\$1,736	\$2,268
Spending by Category (Per Visitor/Trip)			
Accommodations	30.4%	31.2%	23.7%
Air Transportation in the U.S.	6.6%	4.7%	5.0%
Entertainment	12.5%	19.1%	20.4%
Food/Beverages	18.1%	19.9%	23.3%
Gifts/Souvenirs	21.1%	16.2%	17.7%
Ground Transportation in the U.S.	6.2%	5.1%	5.4%
Other	4.9%	3.9%	4.4%

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** Multiple response question. The column may sum 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 Ireland to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Ireland (n = 171)	Leisure Visitors from Ireland (n = 115)
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	32%	29%
Cash from Home/Travelers Checks	27%	19%	22%
Cash Adv./Withdrawal Using Credit Card	18%	21%	20%
Cash Adv./Withdrawal Using Debit Card	6%	18%	22%
Purchases Using Debit Card	6%	10%	7%
Total	100%	100%	100%
Age			
Average Age - Males	40 years	35 years	38 years
Average Age - Females	38 years	37 years	40 years
Occupation			
Mgmt., Business, Science & Arts	44%	45%	38%
Service Occupations	11%	12%	13%
Student	11%	19%	16%
Sales and Office	11%	3%	4%
Retired	8%	7%	10%
Homemaker	4%	4%	6%
Prod., Trans., & Material Moving	4%	1%	1%
Military/Government	3%	6%	7%
Nat. Res., Const., & Maintenance	2%	2%	4%
Other	2%	1%	2%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	8%	11%
\$20,000 - \$39,999	13%	15%	19%
\$40,000 - \$59,999	14%	28%	27%
\$60,000 - \$79,999	11%	12%	11%
\$80,000 - \$99,999	10%	11%	4%
\$100,000 - \$119,999	9%	4%	2%
\$120,000 - \$139,999	6%	7%	7%
\$140,000 - \$159,999	4%	5%	7%
\$160,000 - \$179,999	3%	-	-
\$180,000 - \$199,999	2%	2%	2%
\$200,000 and over	11%	9%	10%
Total	100%	100%	100%
Average Annual Income	\$95,782	\$103,379	\$106,146

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