

CHARACTERISTICS OF TRAVELERS FROM IRELAND TO CALIFORNIA - 2015

Ireland generated approximately 142,000 visitors to California in 2015, up from 121,000 visitors in 2014. Collectively visitors from Ireland spent approximately \$253 million in California in 2015.

Irish visitors to California during 2015 reported spending \$90 per day during a 19.8 night average stay or approximately \$1,781 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 Ireland

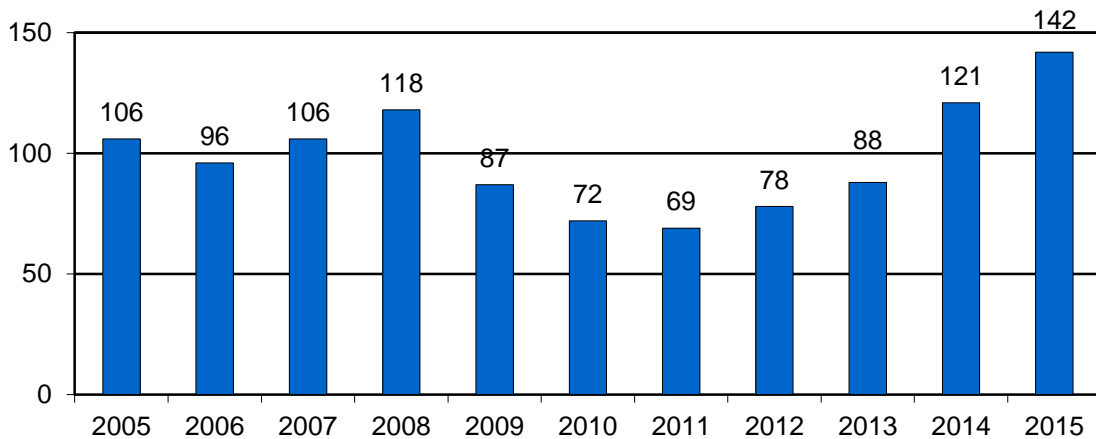
Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2005	383,400	27.6%	106,000
2006	414,423	23.2%	96,000
2007	491,055	21.6%	104,000
2008	531,198	22.2%	118,000
2009	411,203	21.2%	87,000
2010	360,492	20.0%	72,000
2011	346,879	19.9%	69,000
2012	331,850	23.5%	78,000
2013	367,110	24.0%	88,000
2014 ³	395,037	30.6%	121,000
2015 ³	432,207	32.9%	142,000

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

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

3) Sourced from Tourism Economics.

Number of Visitors from Ireland to CA, 2005-2015 (in 000s)



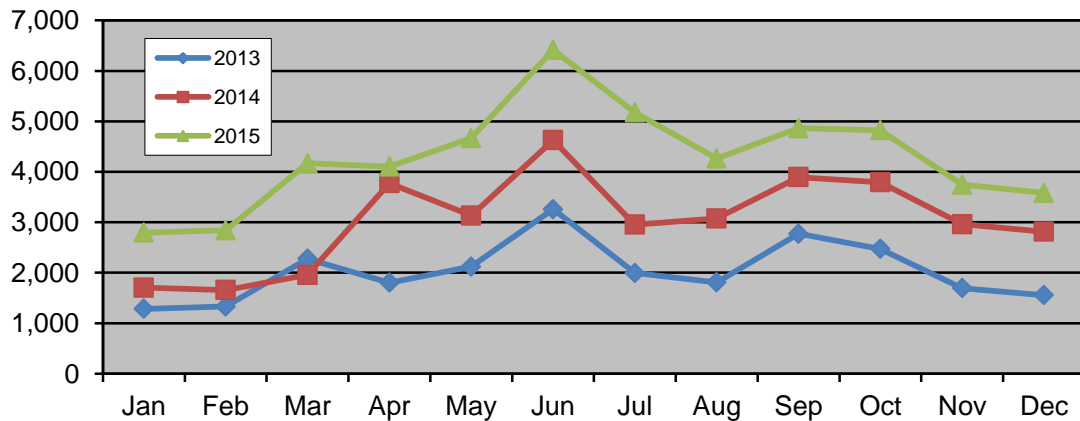
Sources: U.S. Dept. of Commerce, NTTO, Survey of International Air Travelers,
Revised by Tourism Economics for Visit California (October, 2015).

The volume of visitors to California from Ireland reached a peak in 2008 of 118,000 visitors with a market share of 22.2%. However, the global financial collapse at the end of 2008 resulted in a substantial decline in visitor volume from Ireland. Recovery began in 2012 and California's volume of visitors from Ireland increased to a new peak of 142,000 in 2015. The market share of Irish visitors to California increased from 19.9% in 2011 to 32.9% in 2015.

Irish Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Ireland to California were higher in all months of 2015 compared with 2014 and 2013. During 2015, Irish resident arrivals at California ports-of-entry peaked in June. The lowest volumes were recorded in January and February.

**Residents of Ireland
Monthly Port of Entry Arrivals to CA
2013-2015**



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:

- Travel to the U.S for the purpose of visiting friends/relatives
- Use information from the airline to plan their trip
- 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 casino/gambling.
- Make use of a company or private auto 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

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, 2015

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Ireland (n = 191)	Leisure Visitors from Ireland (n = 114)
Primary Purpose of Trip			
Vacation/Holidays	54%	55%	74%
Visit Friends/Relatives	18%	43%	26%
Business	13%	14%	-
Convention/Conference	9%	7%	-
Other Purpose	6%	6%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	67%	67%	80%
Visit Friends/Relatives	34%	36%	41%
Business	17%	19%	1%
Convention/Conference	12%	10%	2%
Sources Used to Plan Trip**			
Airline	43%	49%	56%
Online Travel Agency	34%	30%	24%
Personal Recommendation	29%	19%	22%
Travel Agency Office	23%	24%	29%
Travel Guide	15%	7%	9%
Corporate Travel Department	12%	13%	6%
Tour Operator/Travel Club	9%	11%	14%
National/State/City Travel Office	7%	3%	3%
Advance Planning for Trip			
7 days or less	5%	5%	3%
8 - 30 days	24%	18%	13%
31 - 60 days	19%	15%	15%
61 - 90 days	15%	17%	19%
More than 3 Months	38%	46%	50%
Total	100%	100%	100%
Average Planning Time in Days	108 days	108 days	112 days
Advance Airline Reservations			
7 days or less	8%	5%	4%
8 - 30 days	33%	22%	18%
31 - 60 days	20%	18%	17%
61 - 90 days	13%	15%	19%
91 - 120 days	9%	15%	19%
121 - 180 days	10%	15%	13%
6 Months or More	8%	10%	10%
Total	100%	100%	100%
Average Booking in Days	76 days	89 days	91 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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Ireland (n = 191)	Leisure Visitors from Ireland (n = 114)
Means of Booking Air Trip**			
Airlines Directly	31%	27%	27%
Internet Booking Service	29%	31%	35%
Travel Agency Office	26%	23%	23%
Corporate Travel Department	12%	13%	4%
Tour Operator/Travel Club	9%	11%	11%
Other	1%	-	-
Main Factor in Selecting Airline			
Airfare	29%	31%	30%
Non-Stop Flights	17%	12%	11%
Convenient Schedule	15%	27%	27%
Previous Good Experience	9%	10%	13%
Mileage Bonus/Frequent Flyer Program	8%	5%	5%
Safety Reputation	9%	2%	4%
Loyalty to Carrier	3%	4%	3%
In-flight Service Reputation	3%	-	-
Employer policy	3%	5%	-
On-time Reputation	2%	-	-
Other	3%	4%	6%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	82%	89%	90%
Premium Economy	10%	10%	8%
Executive/Business	8%	3%	2%
First Class	1%	-	-
Total	100%	100%	100%
Use of Package			
Yes	14%	10%	15%
No	86%	90%	85%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	6%	1%	2%
Meals	6%	7%	10%
Bus/Coach	6%	2%	3%
Guided Tours	6%	1%	2%
Rental Car	4%	9%	14%
Tour Guide for Entire Trip	5%	-	-
Airfare and Accommodation Only	3%	1%	1%
Cruise	2%	-	-
Recreation	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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Ireland (n = 191)	Leisure Visitors from Ireland (n = 114)
Travel Companions**			
Traveling Alone	59%	66%	50%
Spouse/Partner	22%	22%	37%
Family/Relatives	15%	8%	10%
Friends	6%	4%	6%
Business Associates	4%	2%	<1%
Tour Group	1%	-	-
Average Travel Party Size	1.7	1.5	1.7
Median Travel Party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	73%	73%	64%
Private Home	32%	33%	41%
Other	6%	1%	2%
Length of Stay			
Mean Nights in the U.S.	22.6 nights	27.3 nights	20.7 nights
Mean Nights in California	12.6 nights	19.8 nights	15.3 nights
% of California Nights	52%	73%	74%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	20%	20%
Average Trips to the U.S. in Past Year	1.7 trips	1.6 trips	1.4 trips
Average Number of States Visited	2.0 states	1.8 states	1.8 states
Average Number of Destinations Visited	3.1 dest.	2.8 dest.	2.9 dest.
Places Visited in the U.S.**			
Los Angeles	60%	45%	48%
San Francisco	45%	56%	62%
Las Vegas	30%	27%	32%
New York City	15%	14%	14%
San Diego	14%	15%	16%
Anaheim-Santa Ana	8%	4%	-
Flagstaff-Grand Canyon-Sedona	7%	4%	7%
San Jose	6%	6%	2%
DC Metro Area	5%	1%	2%
Monterey-Salinas	5%	13%	20%
Santa Barbara	4%	10%	16%
Riverside/San Bernardino	4%	<1%	1%
Oahu	3%	3%	5%
Seattle	3%	1%	1%
Chicago	3%	6%	3%
Miami	2%	1%	1%
Sacramento	2%	5%	5%

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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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Ireland (n = 191)	Leisure Visitors from Ireland (n = 114)
Activities Experienced While in the U.S.**			
Shopping	87%	91%	93%
Sightseeing	83%	84%	92%
National Parks/Monuments	51%	61%	64%
Small Towns/Countryside	42%	54%	57%
Experience Fine Dining	40%	46%	47%
Amusement/Theme Parks	39%	34%	43%
Historical Locations	34%	38%	44%
Guided Tours	31%	45%	48%
Art Gallery/Museums	33%	28%	26%
Casino/Gamble	24%	31%	37%
Cultural/Ethnic Heritage Sites	20%	31%	33%
Concert/Play/Musical	20%	26%	30%
Transportation While in the U.S.**			
Rented Auto	44%	36%	34%
Air Travel between U.S. Cities	44%	49%	55%
Auto, Private or Company	37%	46%	47%
City Subway/Tram/Bus	31%	41%	34%
Taxicab/Limousine	31%	37%	31%
Bus between Cities	19%	18%	17%
Ferry/River Taxi/Srt. Scenic Cruise	10%	14%	11%
Railroad between Cities	7%	10%	7%
Rented Bicycle/Motorcycle/Moped	5%	11%	6%
Cruise Ship/River Boat 1+ Nights	4%	5%	4%
Motor Home/Camper	2%	2%	2%
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,401	\$1,908	\$1,840
Per Visitor Per Day (CA)	\$157	\$90	\$89
Per Visitor/Trip (California)	\$1,979	\$1,781	\$1,360
Spending by Category (Per Visitor/Trip)			
Accommodations	31.5%	33.5%	21.2%
Air Transportation in the U.S.	5.9%	4.7%	6.8%
Entertainment	12.9%	14.4%	23.1%
Food/Beverages	19.9%	19.4%	25.0%
Gifts/Souvenirs	19.2%	12.2%	13.3%
Ground Transportation in the U.S.	6.3%	4.5%	6.1%
Other	4.2%	11.2%	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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Ireland (n = 191)	Leisure Visitors from Ireland (n = 114)
Payment Method for Trip Expenses			
Purchases Using Credit Card	43%	30%	25%
Cash from Home/Travelers Checks	27%	21%	21%
Cash Adv./Withdrawal Using Credit Card	18%	19%	21%
Cash Adv./Withdrawal Using Debit Card	6%	19%	26%
Purchases Using Debit Card	6%	11%	7%
Total	100%	100%	100%
Age			
Average Age - Males	41 years	34 years	35 years
Average Age - Females	38 years	37 years	39 years
Occupation			
Mgmt., Business, Science & Arts	46%	42%	34%
Service Occupations	11%	12%	12%
Student	12%	19%	18%
Sales and Office	11%	8%	10%
Retired	8%	7%	10%
Homemaker	4%	3%	5%
Prod., Trans., & Material Moving	3%	1%	-
Military/Government	3%	4%	5%
Nat. Res., Const., & Maintenance	3%	4%	4%
Other	1%	1%	2%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	5%	8%
\$20,000 - \$39,999	15%	16%	13%
\$40,000 - \$59,999	15%	32%	40%
\$60,000 - \$79,999	14%	13%	12%
\$80,000 - \$99,999	10%	14%	7%
\$100,000 - \$119,999	10%	4%	3%
\$120,000 - \$139,999	4%	5%	6%
\$140,000 - \$159,999	4%	3%	4%
\$160,000 - \$179,999	3%	1%	-
\$180,000 - \$199,999	1%	1%	2%
\$200,000 and over	10%	6%	6%
Total	100%	100%	100%
Average Annual Income	\$89,309	\$80,708	\$79,227

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

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