

CHARACTERISTICS OF TRAVELERS FROM IRELAND TO CALIFORNIA - 2009

Ireland was one of California's smaller overseas markets with approximately 54,000 visitors to California in 2009. Collectively visitors from Ireland spent approximately \$49 million in California.

Irish visitors to California during 2009 reported spending \$89 per day during a 9.6 night average stay or approximately \$899 per visitor. The average spending for all overseas visitors to California was about \$1,205 (\$103 per day; 11.7 nights in California).

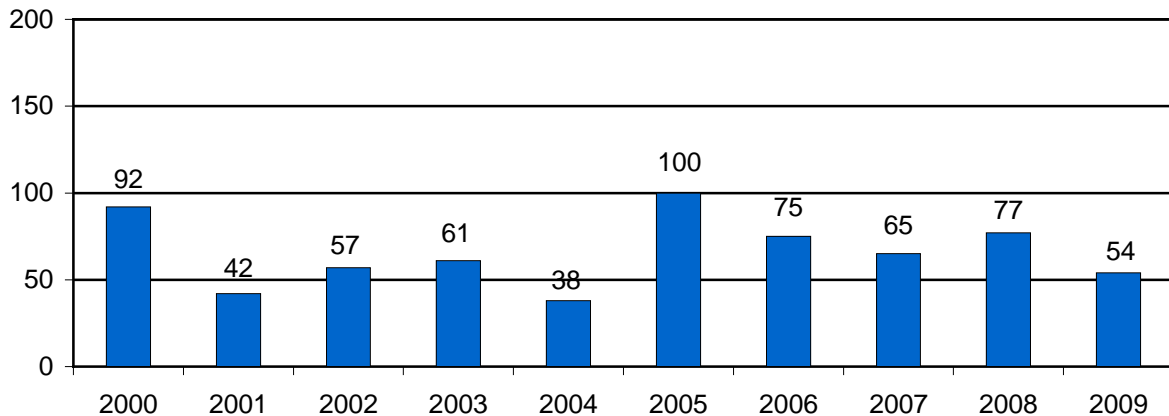
Visitors From Ireland

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1999	246,394	25.2%	62,000
2000	285,697	32.3%	92,000
2001	276,806	15.3%	42,000
2002	259,687	21.8%	57,000
2003	254,320	23.9%	61,000
2004	345,119	11.1%	38,000
2005	383,400	26.2%	100,000
2006	414,423	18.2%	75,000
2007	491,055	13.2%	65,000
2008	531,198	14.5%	77,000
2009	411,203	13.1%	54,000

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 Ireland to CA, 2000-2009 (in 000s)



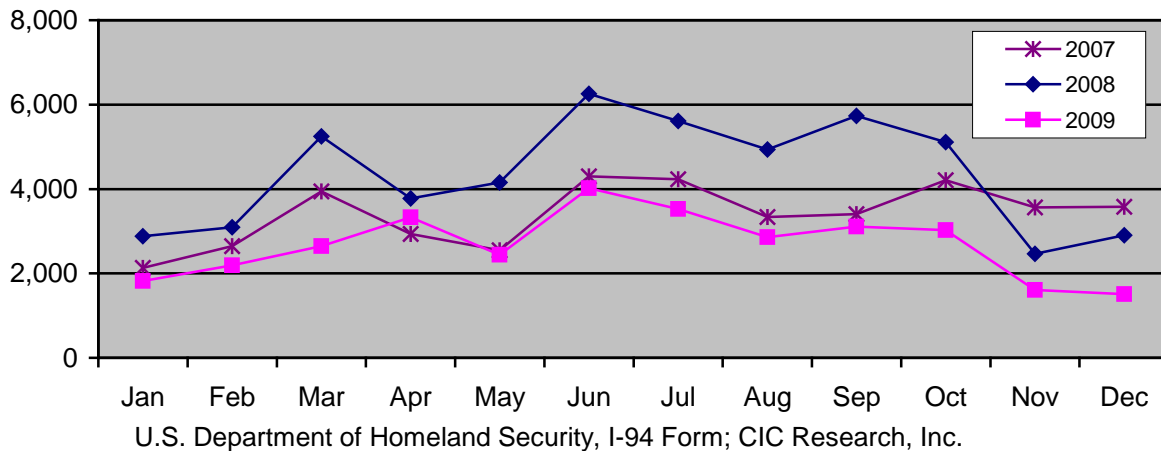
Source: International Trade Administration, Office of Travel and Tourism Industries.

The volume of visitors to California from Ireland has increased and decreased over the past 10 years, reaching a peak in 2005 of 100,000 visitors and a market share of 26.2%. Both California's volume of visitors from Ireland as well as its market share decreased from the previous year to 54,000 visitors and a market share of 13.1%.

Irish Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Ireland to California were lower in most of 2009 compared with 2007 and 2008. During 2009, Irish resident arrivals at California ports-of-entry peaked in June. The lowest volumes were recorded in November and December.

**Residents of Ireland
Monthly Port of Entry Arrivals to CA
2007-2009**



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 California to visit friends/relatives
- Plan their trip with the airlines directly
- Use a personal computer to book their air travel
- Choose an airline based on airfare
- Fly in economy/tourist/coach class
- Travel with a spouse
- Visit San Francisco as part of their trip
- Go sightseeing in cities, visit historical places, cultural heritage sites, tour the countryside, visit art galleries or museums, and go on guided tours
- Use taxis or limousines or city subways/trams/buses for transportation in the U.S.
- Spend less per visitor per day
- Pay in cash for trip expenses
- Work in a professional/technical position

Conversely, visitors from Ireland are less likely to:

- Travel to California for business purposes
- Use a travel agent for trip planning information or booking their air trip
- Fly in executive/business class
- Travel with family or relatives
- Be on their first trip to the U.S.
- Visit Los Angeles as part of their U.S. trip
- Work in a managerial/executive position

Characteristics of Travelers from Ireland to California, 2009

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Ireland (n = 124)	Leisure Visitors from Ireland (n = 95)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	47%	55%	65%
Business/Professional	22%	10%	-
Visit Friends/Relatives	21%	29%	35%
Convention/Conference	6%	5%	-
Other Purpose	5%	1%	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	65%	72%	81%
Visit Friends/Relatives	37%	48%	44%
Business/Professional	26%	14%	1%
Convention/Conference	8%	5%	-
Sources Used to Plan Trip**			
Airlines Directly	23%	36%	40%
Corporate Travel Department	8%	3%	-
Personal Computer	43%	49%	46%
Friends/Relatives	18%	5%	7%
Newspapers/Magazines	3%	1%	1%
State/City Travel Office	4%	1%	-
Tour Company	7%	10%	13%
Travel Agency	40%	18%	23%
Travel Guides	10%	10%	11%
Advance Planning for Trip			
7 days or less	7%	6%	3%
8 - 30 days	28%	21%	16%
31 - 60 days	19%	28%	27%
61 - 90 days	12%	11%	14%
More than 3 Months	34%	34%	40%
Total	100%	100%	100%
Average Planning Time in Days	100 days	104 days	115 days
Advance Airline Reservations			
7 days or less	13%	9%	7%
8 - 30 days	38%	28%	22%
31 - 60 days	16%	26%	27%
61 - 90 days	10%	9%	11%
91 - 120 days	6%	11%	13%
121 - 180 days	10%	9%	11%
6 Months or More	7%	9%	10%
Total	100%	100%	100%
Average Booking in Days	67 days	73 days	82 days

* 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 Ireland to California
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Ireland (n = 124)	Leisure Visitors from Ireland (n = 95)
Means of Booking Air Trip			
Airlines Directly	13%	13%	17%
Corporate Travel Department	9%	3%	-
Personal Computer	25%	55%	46%
Travel Agent	46%	23%	28%
Travel Club	1%	3%	4%
Tour Operator	5%	1%	1%
Other/Don't Know	2%	3%	3%
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	32%	49%	56%
Schedule	13%	17%	7%
Non-Stop Flight	12%	18%	20%
Mileage Bonus/Frequent Flyer Program	10%	5%	-
Previous Good Experience	9%	3%	4%
Safety Reputation	6%	1%	2%
Airline Loyalty	4%	2%	2%
In-flight Service	5%	5%	8%
Employer policy	3%	-	-
Other	6%	1%	1%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	81%	98%	97%
Executive/Business	17%	1%	1%
First Class	2%	1%	2%
Total	100%	100%	100%
Use of Package			
Yes	14%	18%	23%
No	86%	83%	77%
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	-	-
8 - 30 days	24%	45%	47%
31 - 60 days	13%	4%	-
61 - 90 days	13%	-	-
91 - 120 days	8%	15%	16%
121 - 180 days	18%	17%	17%
6 Months or More	20%	18%	19%
Total	100%	100%	100%

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**Characteristics of Travelers from Ireland to California
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Ireland (n = 124)	Leisure Visitors from Ireland (n = 95)
Travel Companions**			
Business Associates	8%	2%	-
Family/Relatives	25%	11%	14%
Friends	11%	14%	17%
Spouse	28%	41%	50%
Tour Group	2%	-	-
Traveling Alone	38%	37%	26%
Average Travel Party Size	1.6	1.6	1.7
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	69%	67%
Private Home	30%	38%	41%
Other	4%	2%	2%
Length of Stay			
Mean Nights in the U.S.	22.4 nights	19.5 nights	18.7 nights
Mean Nights in California	11.7 nights	9.6 nights	8.8 nights
% of California Nights	52%	49%	47%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	5%	6%
Average Trips to the U.S. in Past Year	1.7 trips	1.8 trips	1.7 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	5.1 trips	4.3 trips
Average Number of States Visited	2.1 states	2.1 states	2.0 states
Average Number of Destinations Visited	3.0 dest.	2.9 dest.	3.0 dest.
Places Visited in the U.S.**			
Los Angeles	55%	37%	45%
San Francisco	48%	62%	63%
Las Vegas	30%	30%	40%
New York City	18%	18%	22%
San Diego	13%	9%	10%
Anaheim-Santa Ana	7%	3%	4%
Grand Canyon	7%	4%	5%
San Jose	6%	7%	4%
Yosemite	4%	5%	6%
Chicago	4%	6%	2%
DC Metro Area	4%	10%	1%
Monterey-Salinas	4%	5%	7%
Riverside/San Bernardino	4%	1%	-
Seattle	3%	-	-
Sacramento	3%	6%	2%
Santa Barbara	3%	2%	2%
Oakland	2%	2%	2%

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**Characteristics of Travelers from Ireland to California
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Ireland (n = 124)	Leisure Visitors from Ireland (n = 95)
Activities Experienced While in the U.S.**			
Shopping	87%	96%	98%
Dining Out	86%	89%	92%
Sightseeing in Cities	56%	69%	75%
Historical Places	45%	72%	73%
National Parks	39%	47%	55%
Amusement/Theme Parks	39%	42%	49%
Visiting Small Towns	38%	39%	49%
Cultural Heritage Sites	32%	57%	57%
Touring Countryside	31%	42%	47%
Casinos/Gambling	27%	36%	44%
Art Gallery/Museum	26%	41%	43%
Guided Tours	24%	42%	48%
Transportation While in the U.S.**			
Airlines in U.S.	39%	45%	46%
Taxi/Limousine	39%	50%	51%
Rented Auto	38%	31%	30%
Company or Private Auto	29%	20%	25%
City Subway/Tram/Bus	26%	41%	44%
Railroad between Cities	11%	7%	6%
Bus between Cities	10%	8%	4%
Motor Home/Camper	2%	-	-
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,584	\$2,714	\$2,922
Per Visitor/Trip (U.S.)	\$2,308	\$1,740	\$1,691
Per Visitor Per Day	\$103	\$89	\$91
Per Visitor/Trip (California)	\$1,205	\$899	\$801
Spending by Category (Per Visitor/Trip)			
Lodging	\$660	\$493	\$496
Food/Beverages	\$463	\$422	\$500
Gifts/Souvenirs	\$395	\$278	\$259
Transportation in the U.S.	\$348	\$299	\$114
Entertainment	\$234	\$185	\$250
Expenses at the Airport	\$34	\$33	\$27
Other	\$174	\$31	\$44
Total Spending Per Visitor/Trip	\$2,308	\$1,740	\$1,691

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(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Ireland (n = 124)	Leisure Visitors from Ireland (n = 95)
Payment Method for Trip Expenses			
Credit Cards	50%	46%	46%
Cash	41%	51%	52%
Debit Cards	7%	3%	3%
Travelers Checks	2%	-	-
Total	100%	100%	100%
Age			
Average Age - Males	43 years	49 years	52 years
Average Age - Females	39 years	37 years	37 years
Occupation			
Professional/Technical	35%	50%	49%
Manager/Executive	28%	8%	5%
Student	10%	5%	4%
Retired	8%	13%	16%
Clerical/Sales	7%	8%	11%
Other	13%	16%	15%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	9%	1%	2%
\$20,000 - \$39,999	14%	21%	21%
\$40,000 - \$59,999	14%	10%	6%
\$60,000 - \$79,999	13%	15%	21%
\$80,000 - \$99,999	11%	7%	10%
\$100,000 - \$119,999	9%	17%	10%
\$120,000 - \$139,999	6%	7%	10%
\$140,000 - \$159,999	5%	8%	7%
\$160,000 - \$179,999	3%	-	-
\$180,000 - \$199,999	3%	6%	8%
\$200,000 and over	12%	-	6%
Total	100%	100%	100%
Average Annual Income	\$94,800	\$97,500	\$95,400

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