

CHARACTERISTICS OF TRAVELERS FROM IRELAND TO CALIFORNIA - 2008

Ireland was one of California's large overseas markets with approximately 77,000 visitors to California in 2008. Collectively visitors from Ireland spent approximately \$107 million in California.

Irish visitors to California during 2008 reported spending \$140 per day during an 9.9 night average stay or approximately \$1,386 per visitor. The average spending for all overseas visitors to California was about \$1,353 (\$123 per day; 11.0 nights in California).

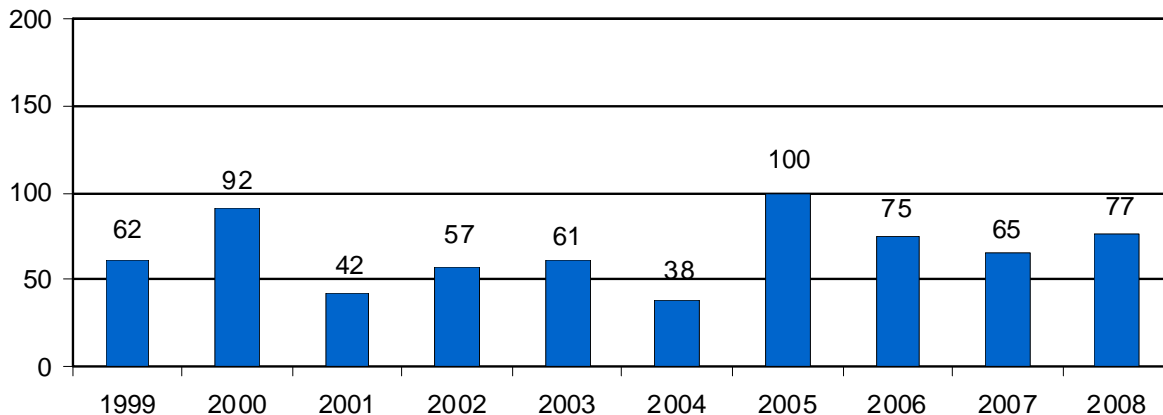
Visitors From Ireland

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1998	232,391	22.8%	53,000
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

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, 1999-2008 (in 000s)



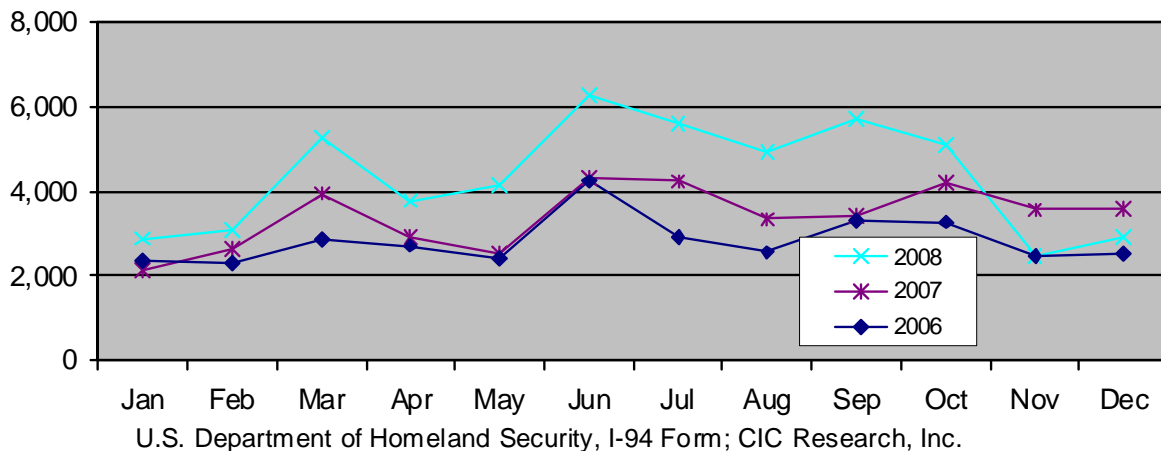
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 increased from the past year to 77,000 visitors and a market share of 14.5%.

Irish Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Ireland to California were higher in most of 2008 compared with 2006 and 2007 except for November and December. During 2008, Irish resident arrivals at California ports-of-entry peaked in March, June, and September. The lowest volumes were recorded in January, November, and December.

**Residents of Ireland
Monthly Port of Entry Arrivals to CA
2006-2008**



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 for leisure/recreation/holiday purposes
- Use a personal computer to get information to plan as well as book their trip
- Select an airline due to a non-stop flight or schedule
- Fly in economy/tourist/coach class
- Shop, visit historical places, amusement and theme parks, and go on guided tours
- Use taxis or limousines for transportation in the U.S.
- Spend less per visitor per trip
- Pay in cash for trip expenses
- Have a higher annual household income

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
- Select an airline due to airfare or a mileage bonus/frequent flyer program
- Fly in executive/business class
- Travel alone
- Use airlines or a company or private auto for transportation in the U.S.
- Use credit cards to pay for trip expenses
- Work in a management or executive occupation.

Characteristics of Travelers from Ireland to California – 2008

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Ireland (n = 337)	Leisure Visitors from Ireland (n = 256)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	43%	61%	81%
Visit Friends/Relatives	19	15	19
Business/Professional	27	20	-
Convention/Conference	7	3	-
Other Purpose	5	1	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	63%	73%	90%
Visit Friends/Relatives	37	35	38
Business/Professional	31	21	1
Convention/Conference	11	5	0
Sources Used to Plan Trip**			
Airlines Directly	21%	22%	24%
Corporate Travel Department	11	12	0
Personal Computer	42	49	56
Friends/Relatives	16	17	23
Newspapers/Magazines	3	3	4
State/City Travel Office	4	1	2
Tour Company	6	3	4
Travel Agency	43	29	27
Travel Guides	10	9	13
Advance Planning for Trip			
7 days or less	9%	11%	7%
8 - 30 days	30	17	12
31 - 60 days	19	27	29
61 - 90 days	13	17	17
More than 3 Months	30	28	35
Total	100%	100%	100%
Average Planning Time in Days	92	91	105
Advance Airline Reservations			
7 days or less	16%	14%	10%
8 - 30 days	38	24	19
31 - 60 days	17	25	26
61 - 90 days	10	14	15
91 - 120 days	5	9	11
121 - 180 days	8	10	13
6 Months or More	6	5	6
Total	100%	100%	100%
Average Booking in Days	60	70	80

* 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
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Ireland (n = 337)	Leisure Visitors from Ireland (n = 256)
Means of Booking Air Trip			
Airlines Directly	12%	12%	16%
Corporate Travel Department	11	13	3
Personal Computer	22	44	52
Travel Agent	48	29	26
Travel Club	1	-	-
Tour Operator	4	2	2
Other/Don't Know	3	1	1
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	24%	13%	15%
Schedule	15	21	10
Non-Stop Flight	13	36	39
Mileage Bonus/Frequent Flyer Program	12	0	0
Previous Good Experience	10	11	16
Safety Reputation	7	6	5
Airline Loyalty	4	5	6
In-flight Service	5	1	1
Employer policy	4	1	0
Other	6	6	8
Airline Seating Area			
Economy/Tourist/Coach	77%	85%	94%
Executive/Business	20	9	4
First Class	3	6	1
Total	100%	100%	100%
Use of Package			
Yes	11%	10%	10%
No	89	90	90
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	2%	-
8 - 30 days	26	18	17%
31 - 60 days	23	30	40
61 - 90 days	12	6	-
91 - 120 days	5	33	27
121 - 180 days	17	4	5
6 Months or More	14	8	11
Total	100%	100%	100%

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**Characteristics of Travelers from Ireland to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Ireland (n = 337)	Leisure Visitors from Ireland (n = 256)
Travel Companions**			
Business Associates	10%	6%	0%
Family/Relatives	23	28	36
Friends	12	16	21
Spouse	27	30	38
Tour Group	2	1	0
Traveling Alone	39	31	19
Average Travel Party Size	1.5	1.7	1.9
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	78%	85%	81%
Private Home	28	25	28
Other	4	2	3
Length of Stay			
Mean Nights in the U.S.	21.2	17.8	18.8
Mean Nights in California	11.0	9.9	10.4
% of California Nights	52%	56%	55%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	24%	22%	26%
Average Trips to the U.S. in Past Year	2.0	1.8	1.4
Average Trips to the U.S. in Past 5 Years	6.3	4.8	3.2
Average Number of States Visited	2.0	1.7	1.9
Average Number of Destinations Visited	2.9	2.7	3.2
Places Visited in the U.S.**			
Los Angeles	53%	56%	68%
San Francisco	49	50	50
Las Vegas	28	27	33
New York City	17	11	15
San Diego	13	13	15
San Jose	7	5	2
Anaheim-Santa Ana	7	8	7
Yosemite	5	4	5
Grand Canyon	4	4	6
Chicago	4	4	6
DC Metro Area	4	3	3
Monterey-Salinas	4	8	12
Seattle	3	2	1
Sacramento	3	4	5
Riverside/San Bernardino	3	4	3
Santa Barbara	3	4	4

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(2008 - cont.)**

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Activities Experienced While in the U.S.**			
Dining Out	87%	90%	87%
Shopping	85	94	95
Sightseeing in Cities	53	59	71
Historical Places	44	61	69
Visiting Small Towns	36	38	51
National Parks	35	35	44
Amusement/Theme Parks	34	44	58
Touring Countryside	30	34	42
Cultural Heritage Sites	28	31	38
Casinos/Gambling	24	29	36
Art Gallery/Museum	23	25	27
Guided Tours	22	38	51
Transportation While in the U.S.**			
Taxi/Limousine	42%	50%	49%
Airlines in U.S.	40	25	26
Rented Auto	36	35	37
Company or Private Auto	28	18	20
City Subway/Tram/Bus	26	22	25
Railroad between Cities	11	11	11
Bus between Cities	9	15	19
Motor Home/Camper	2	2	2
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,998	\$3,448	\$5,006
Per Visitor/Trip (U.S.)	2,607	2,055	2,610
Per Visitor Per Day	123	119	138
Per Visitor/Trip (California)	\$1,353	\$1,386	\$1,435
Spending by Category (Per Visitor/Trip)			
Lodging	\$800	\$628	\$596
Food/Beverages	526	401	594
Gifts/Souvenirs	450	369	456
Transportation in the U.S.	425	324	322
Entertainment	234	235	407
Expenses at the Airport	37	24	46
Other	135	74	190
Total Spending Per Visitor/Trip	\$2,607	\$2,055	\$2,610

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(2008 - cont.)**

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Payment Method for Trip Expenses			
Credit Cards	53%	45%	35%
Cash	37	51	60
Debit Cards	6	3	5
Travelers Checks	3	1	1
Total	100%	100%	100%
Age			
Average Age - Males	41	38	38
Average Age - Females	38	39	38
Occupation			
Manager/Executive	34%	25%	20%
Professional/Technical	32	36	34
Student	8	8	10
Clerical/Sales	7	7	9
Retired	6	9	10
Other	13	15	17
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	6%	2%	1%
\$20,000 - \$39,999	10	9	11
\$40,000 - \$59,999	13	10	14
\$60,000 - \$79,999	11	12	13
\$80,000 - \$99,999	11	14	15
\$100,000 - \$119,999	11	7	4
\$120,000 - \$139,999	7	15	11
\$140,000 - \$159,999	6	5	6
\$160,000 - \$179,999	4	4	4
\$180,000 - \$199,999	3	5	3
\$200,000 and over	18	19	17
Total	100%	100%	100%
Average Annual Income	\$107,200	\$117,000	\$110,400

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