

CHARACTERISTICS OF TRAVELERS FROM ITALY TO CALIFORNIA – 2013

Italy was one of California’s large overseas markets with approximately 157,000 visitors to California in 2013. Collectively visitors from Italy spent approximately \$312 million in California.

Italian visitors to California during 2013 reported spending \$191 per day during an 10.4 night average stay or approximately \$1,987 per visitor. The average spending for all overseas visitors to California was about \$1,940 (\$159 per day; 12.2 nights in California).

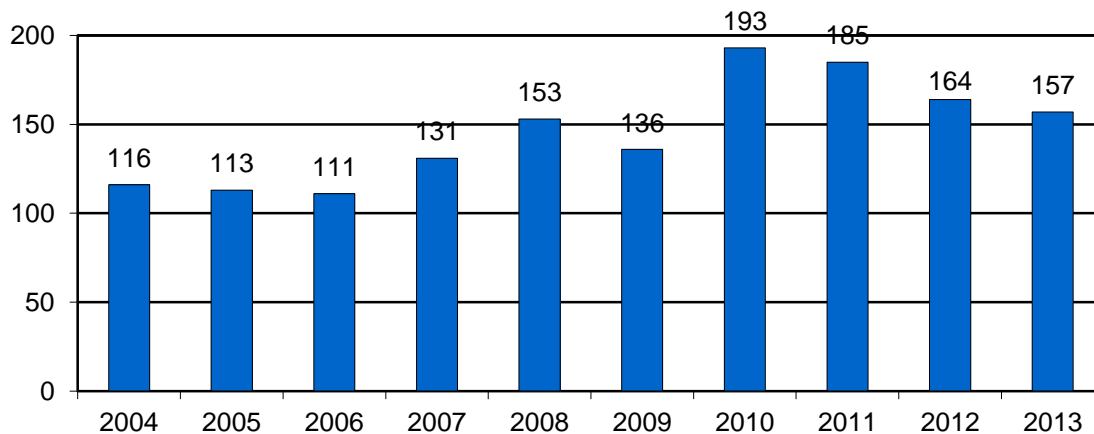
Visitors From Italy

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2003	408,633	19.8%	81,000
2004	470,805	24.6%	116,000
2005	545,546	20.7%	113,000
2006	532,829	20.8%	111,000
2007	634,152	20.7%	131,000
2008	779,463	19.6%	153,000
2009	753,310	18.1%	136,000
2010	838,225	23.0%	193,000
2011	891,571	20.7%	185,000
2012	831,343	19.7%	164,000
2013	838,883	18.7%	157,000

1) U.S. Dept of Homeland Security, Form I-94, Non-Resident Arrival Records.

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

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



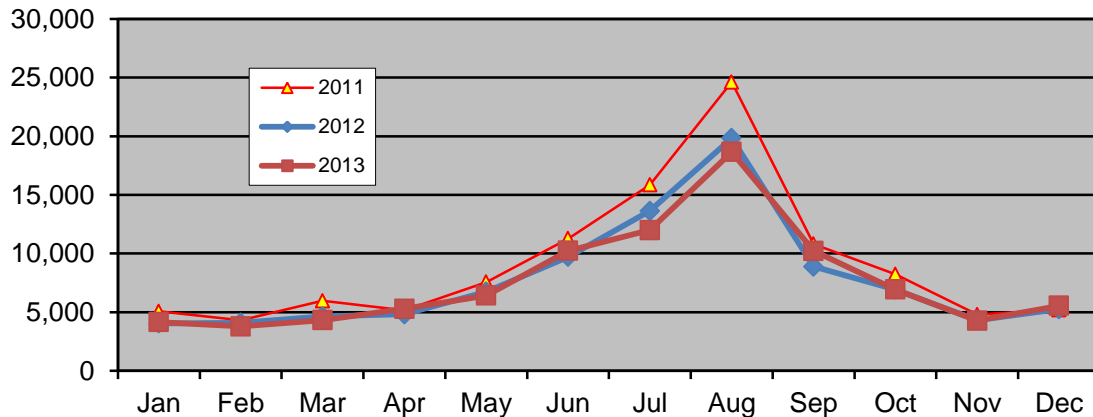
Source: U.S. Dept. of Commerce, National Travel and Tourism Office.

In the last three years of the 1990s the volumes of visitors to California from Italy were consistently at their highest level of over 190,000 visitors per year after increasing from around 150,000 visitors per year in the mid 1990s. Visitation from Italy then dropped to a low of 81,000 in 2003 after the 9-11 terrorist attacks. California's market share of Italian visitors dropped from a high of 34% in 1998 to just 18% in 2009. The volume of visitors from Italy to California has experienced a slow growth since 2003, reaching 193,000 visitors in 2010 but then dropping to 157,000 in 2013. The volume and market share (18.7%) of Italian visitors to California still remains below the levels recorded in the late 1990s.

Italian Arrivals at California Airports

Monthly volumes of port-of-entry passenger arrivals from Italy to California were slightly lower in 2013 than in 2011 but about the same as in 2012. In all three years, Italian resident arrivals at California ports-of-entry peaked in August. The lowest volumes were consistently recorded in the months of January through April as well as November and December.

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



U.S. Department of Homeland Security, I-94 Form; CIC Research, Inc.

Comparisons with Overseas Visitors

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

- Travel to California for vacation/holiday purposes
- Plan their air trip with a travel agency office, a tour operator/travel club or an online travel agency
- Plan their trip further in advance
- Book their air trip with a tour operator/travel club
- Travel with their spouse/partner
- Visit San Francisco and Las Vegas
- Use a rented auto for transportation while in the U.S.
- Spend a higher proportion of their travel dollars on accommodation as well as on food/beverages
- Pay for trip expenses with a credit card

Conversely, visitors from Italy are less likely to:

- Travel to California to visit friends or relatives
- Select an airline based on non-stop flights
- Travel alone
- Go sightseeing, experience fine dining, or attend a concert/play/musical
- Spend their travel dollars on gifts/souvenirs

Characteristics of Travelers from Italy to California – 2013

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Italy (n = 149)	Leisure Visitors from Italy (n = 106)
Primary Purpose of Trip			
Vacation/Holidays	52%	70%	89%
Visit Friends/Relatives	17%	8%	11%
Business	15%	14%	-
Convention/Conference	9%	5%	-
Other Purpose	8%	3%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	64%	74%	93%
Visit Friends/Relatives	32%	20%	22%
Business	20%	18%	4%
Convention/Conference	12%	7%	2%
Sources Used to Plan Trip**			
Airline	43%	35%	34%
Online Travel Agency	31%	41%	49%
Travel Agency Office	26%	36%	40%
Personal Recommendation	26%	23%	28%
Travel Guide	15%	21%	26%
Corporate Travel Department	14%	17%	10%
Tour Operator/Travel Club	9%	20%	25%
National/State/City Travel Office	8%	14%	18%
Advance Planning for Trip			
7 days or less	5%	5%	3%
8 - 30 days	27%	22%	16%
31 - 60 days	17%	10%	9%
61 - 90 days	14%	10%	10%
More than 3 Months	36%	53%	61%
Total	100%	100%	100%
Average Planning Time in Days	105 days	121 days	138 days
Advance Airline Reservations			
7 days or less	10%	7%	5%
8 - 30 days	35%	28%	21%
31 - 60 days	17%	16%	18%
61 - 90 days	13%	8%	8%
91 - 120 days	8%	17%	19%
121 - 180 days	9%	16%	20%
6 Months or More	7%	8%	8%
Total	100%	100%	100%
Average Booking in Days	72 days	84 days	94 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%.

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

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

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Italy (n = 149)	Leisure Visitors from Italy (n = 106)
Means of Booking Air Trip**			
Travel Agency Office	31%	34%	36%
Airlines Directly	28%	20%	21%
Internet Booking Service	24%	23%	26%
Corporate Travel Department	15%	8%	1%
Tour Operator/Travel Club	9%	20%	24%
Other	2%	2%	-
Main Factor in Selecting Airline			
Airfare	29%	38%	47%
Non-Stop Flights	17%	7%	4%
Convenient Schedule	15%	21%	22%
Mileage Bonus/Frequent Flyer Program	9%	7%	1%
Previous Good Experience	9%	9%	6%
Safety Reputation	6%	4%	6%
Loyalty to Carrier	4%	8%	7%
Other	4%	3%	5%
Employer policy	3%	-	-
In-flight Service Reputation	3%	<1%	<1%
On-time Reputation	2%	3%	2%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	79%	88%	91%
Executive/Business	10%	7%	3%
Premium Economy	10%	5%	6%
First Class	1%	-	-
Total	100%	100%	100%
Use of Package			
Yes	15%	23%	28%
No	85%	77%	72%
Total	100%	100%	100%
Travel Package Includes**			
Airfare and Accommodation Only	3%	2%	3%
Attractions/Events/Entertainment	7%	7%	8%
Bus/Coach	7%	6%	8%
Cruise	2%	1%	1%
Guided Tours	6%	8%	11%
Meals	6%	5%	6%
Recreation	1%	-	-
Rental Car	5%	12%	15%
Tour Guide for Entire Trip	4%	3%	5%

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

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Italy (n = 149)	Leisure Visitors from Italy (n = 106)
Travel Companions**			
Traveling Alone	61%	46%	35%
Spouse/Partner	21%	36%	48%
Family/Relatives	13%	14%	17%
Friends	6%	5%	7%
Business Associates	4%	3%	-
Tour Group	1%	<1%	<1%
Average Travel Party Size	1.6	1.8	1.9
Median Travel Party Size	1.0	2.0	2.0
Type of Lodging**			
Hotel / Motel	76%	77%	75%
Private Home	27%	23%	24%
Other	6%	8%	10%
Length of Stay			
Mean Nights in the U.S.	22.5 nights	16.8 nights	18.6 nights
Mean Nights in California	12.2 nights	10.4 nights	11.6 nights
% of California Nights	54%	62%	62%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	24%	28%
Average Trips to the U.S. in Past Year	1.7 trips	1.5 trips	1.4 trips
Average Number of States Visited	2.0 states	2.2 states	2.4 states
Average Number of Destinations Visited	3.0 dest.	3.5 dest.	4.0 dest.
Places Visited in the U.S.**			
Los Angeles	59%	67%	74%
San Francisco	47%	61%	65%
Las Vegas	30%	40%	49%
New York City	16%	22%	25%
San Diego	13%	10%	8%
Anaheim-Santa Ana	8%	3%	2%
Flagstaff-Grand Canyon-Sedona	7%	15%	18%
San Jose	6%	5%	4%
DC Metro Area	4%	1%	1%
Monterey-Salinas	4%	6%	9%
Oahu	4%	5%	7%
Santa Barbara	3%	8%	10%
Riverside/San Bernardino	3%	1%	2%
Chicago	3%	1%	1%
Seattle	3%	-	-
Sacramento	3%	2%	3%
Miami	3%	5%	6%

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

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Italy (n = 149)	Leisure Visitors from Italy (n = 106)
Activities Experienced While in the U.S.**			
Shopping	88%	81%	77%
Sightseeing	84%	71%	73%
National Parks/Monuments	49%	55%	62%
Experience Fine Dining	43%	30%	27%
Small Towns/Countryside	41%	42%	47%
Amusement/Theme Parks	38%	32%	29%
Historical Locations	37%	37%	43%
Guided Tours	33%	41%	43%
Art Gallery/Museums	30%	28%	30%
Casino/Gamble	25%	28%	34%
Cultural/Ethnic Heritage Sites	21%	19%	23%
Concert/Play/Musical	20%	11%	9%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	46%	41%	45%
Rented Auto	43%	55%	60%
Auto, Private or Company	37%	31%	31%
City Subway/Tram/Bus	33%	33%	33%
Taxicab/Limousine	33%	27%	26%
Bus between Cities	18%	20%	22%
Ferry/River Taxi/Srt. Scenic Cruise	12%	13%	16%
Railroad between Cities	8%	5%	4%
Rented Bicycle/Motorcycle/Moped	5%	9%	10%
Cruise Ship/River Boat 1+ Nights	4%	4%	3%
Motor Home/Camper	2%	<1%	-
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,577	\$3,210	\$3,354
Per Visitor Per Day (CA)	\$159	\$191	\$180
Per Visitor/Trip (California)	\$1,940	\$1,987	\$2,092
Spending by Category (Per Visitor/Trip)			
Accommodations	29.1%	36.4%	31.8%
Air Transportation in the U.S.	6.9%	4.3%	4.2%
Entertainment	12.2%	12.6%	15.2%
Food/Beverages	17.8%	24.7%	26.5%
Gifts/Souvenirs	21.9%	13.4%	14.0%
Ground Transportation in the U.S.	5.6%	5.4%	5.9%
Other	6.3%	3.0%	2.4%

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** Multiple response question. Table may add 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 Italy to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Italy (n = 149)	Leisure Visitors from Italy (n = 106)
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	55%	55%
Cash from Home/Travelers Checks	26%	22%	27%
Cash Adv./Withdrawal Using Credit Card	18%	15%	12%
Cash Adv./Withdrawal Using Debit Card	7%	5%	5%
Purchases Using Debit Card	6%	3%	2%
Total	100%	100%	100%
Age			
Average Age - Males	42 years	40 years	38 years
Average Age - Females	39 years	36 years	36 years
Occupation			
Mgmt., Business, Science, & Arts	44%	47%	42%
Service Occupations	11%	18%	17%
Student	11%	10%	9%
Sales and Office	10%	12%	13%
Retired	8%	2%	3%
Homemaker	5%	2%	3%
Prod., Trans., & Material Moving	4%	1%	2%
Military/Government	4%	3%	4%
Nat. Res., Const., & Maintenance	3%	3%	4%
Other	2%	3%	4%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	10%	15%
\$20,000 - \$39,999	14%	16%	17%
\$40,000 - \$59,999	14%	15%	12%
\$60,000 - \$79,999	12%	20%	26%
\$80,000 - \$99,999	10%	10%	9%
\$100,000 - \$119,999	8%	5%	7%
\$120,000 - \$139,999	6%	5%	6%
\$140,000 - \$159,999	5%	3%	3%
\$160,000 - \$179,999	3%	-	-
\$180,000 - \$199,999	3%	-	-
\$200,000 and over	12%	15%	5%
Total	100%	100%	100%
Average Annual Income	\$100,889	\$102,893	\$90,291

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