

## CHARACTERISTICS OF TRAVELERS FROM ITALY TO CALIFORNIA – 2014

Italy was one of California’s large overseas markets with approximately 178,000 visitors to California in 2014. Collectively visitors from Italy spent approximately \$280 million in California.

Italian visitors to California during 2014 reported spending \$135 per day during an 11.7 night average stay or approximately \$1,574 per visitor. The average spending for all overseas visitors to California was about \$1,872 (\$153 per day; 12.2 nights in California).

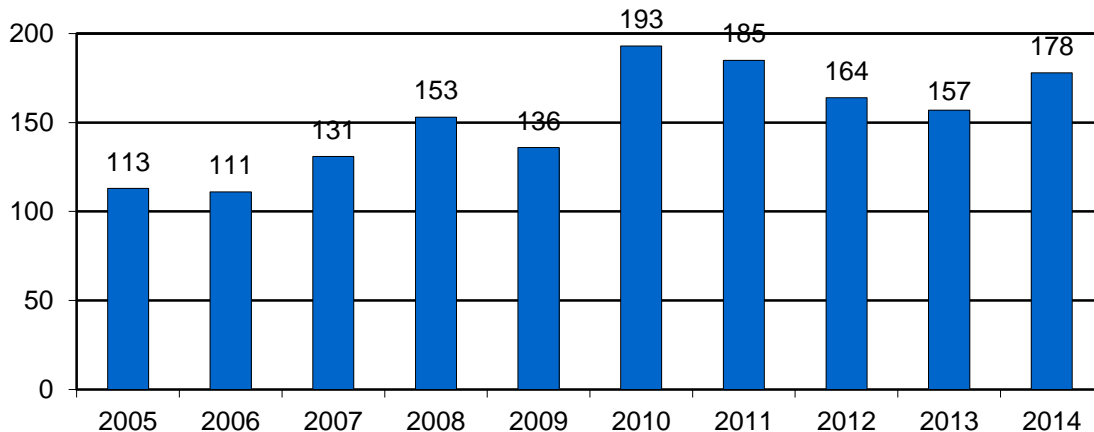
### Visitors From Italy

Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
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
2014	934,066	19.0%	178,000

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, 2005-2014 (in 000s)



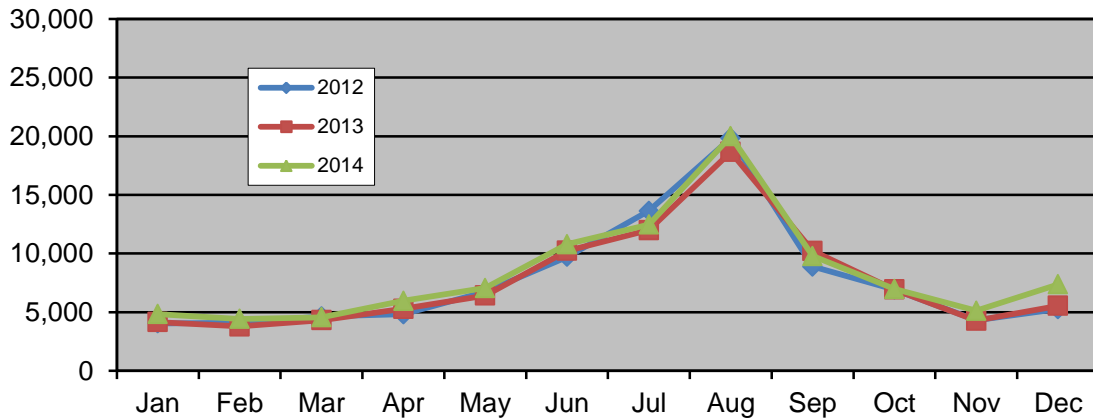
Sources: U.S. Dept. of Commerce, National Travel and Tourism Office,  
Revised by Tourism Economics for Visit California (October, 2015).

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 before rising to 178,000 in 2014. The volume and market share (19.0%) 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 almost the same in 2014 when compared with 2012 and 2013. 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  
2012-2014**



Sources: U.S. Department of Homeland Security, I-94 International Arrival Records, CIC Research, Inc., Visitor 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 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 and book their air trip with a travel agency office
- Have longer advance trip planning and airline reservation horizons
- Select an airline based on a convenient schedule
- Travel with their spouse/partner
- Stay in a hotel/motel
- Visit San Francisco, Las Vegas, and Flagstaff/the Grand Canyon/Sedona
- Use a rented auto for transportation while in the U.S.
- Spend less in the U.S. as well as in California
- Spend a higher proportion of their travel dollars on food/beverages in the U.S.
- Pay for trip expenses with a credit card
- Have a lower average annual income

Conversely, visitors from Italy are less likely to:

- Travel to California to visit friends or relatives
- Plan and book their air trip directly with airlines
- Select an airline based on non-stop flights
- Stay in a private home
- Go shopping, sightseeing, experience fine dining, attend a concert/play/musical, or an amusement/theme park
- Work in a management/business/science & arts occupation

### Characteristics of Travelers from Italy to California – 2014

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Italy (n = 208)	Leisure Visitors from Italy (n = 158)
<b>Primary Purpose of Trip</b>			
Vacation/Holidays	54%	73%	92%
Visit Friends/Relatives	18%	6%	8%
Business	13%	7%	-
Convention/Conference	8%	6%	-
Other Purpose	7%	7%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Vacation/Holidays	66%	79%	94%
Visit Friends/Relatives	34%	17%	13%
Business	18%	12%	<1%
Convention/Conference	12%	8%	1%
<b>Sources Used to Plan Trip**</b>			
Airline	43%	32%	30%
Online Travel Agency	32%	24%	21%
Travel Agency Office	25%	36%	41%
Personal Recommendation	29%	26%	27%
Travel Guide	15%	16%	15%
Corporate Travel Department	12%	9%	5%
Tour Operator/Travel Club	10%	14%	16%
National/State/City Travel Office	8%	16%	17%
<b>Advance Planning for Trip</b>			
7 days or less	5%	4%	1%
8 - 30 days	25%	18%	12%
31 - 60 days	19%	16%	17%
61 - 90 days	15%	15%	17%
More than 3 Months	36%	47%	53%
Total	100%	100%	100%
Average Planning Time in Days	106 days	119 days	131 days
<b>Advance Airline Reservations</b>			
7 days or less	9%	8%	3%
8 - 30 days	35%	23%	20%
31 - 60 days	19%	16%	18%
61 - 90 days	12%	13%	13%
91 - 120 days	8%	12%	15%
121 - 180 days	10%	19%	20%
6 Months or More	8%	10%	12%
Total	100%	100%	100%
Average Booking in Days	74 days	95 days	105 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  
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Italy (n = 208)	Leisure Visitors from Italy (n = 158)
<b>Means of Booking Air Trip**</b>			
Travel Agency Office	29%	43%	52%
Airlines Directly	29%	19%	16%
Internet Booking Service	27%	21%	22%
Corporate Travel Department	12%	6%	1%
Tour Operator/Travel Club	10%	14%	14%
Other	1%	2%	3%
<b>Main Factor in Selecting Airline</b>			
Airfare	31%	30%	40%
Non-Stop Flights	19%	9%	6%
Convenient Schedule	14%	25%	20%
Previous Good Experience	8%	14%	10%
Mileage Bonus/Frequent Flyer Program	6%	3%	-
Safety Reputation	6%	7%	7%
Loyalty to Carrier	3%	2%	3%
In-flight Service Reputation	3%	1%	2%
Employer policy	2%	<1%	<1%
On-time Reputation	2%	3%	3%
Other	5%	6%	9%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	83%	90%	91%
Premium Economy	9%	7%	8%
Executive/Business	8%	3%	2%
First Class	1%	-	-
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	15%	20%	23%
No	85%	80%	77%
Total	100%	100%	100%
<b>Travel Package Includes**</b>			
Attractions/Events/Entertainment	7%	6%	7%
Bus/Coach	6%	9%	9%
Guided Tours	6%	7%	10%
Meals	6%	5%	6%
Rental Car	5%	11%	14%
Tour Guide for Entire Trip	4%	4%	5%
Airfare and Accommodation Only	2%	2%	2%
Cruise	2%	-	<1%
Recreation	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 Italy to California  
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Italy (n = 208)	Leisure Visitors from Italy (n = 158)
<b>Travel Companions**</b>			
Traveling Alone	59%	51%	30%
Spouse/Partner	22%	33%	47%
Family/Relatives	15%	15%	20%
Friends	6%	5%	7%
Business Associates	3%	1%	-
Tour Group	1%	<1%	<1%
<b>Average Travel Party Size</b>	1.7	1.7	2.0
<b>Median Travel Party Size</b>	1.0	1.0	2.0
<b>Type of Lodging**</b>			
Hotel / Motel	76%	85%	83%
Private Home	30%	19%	21%
Other	6%	6%	8%
<b>Length of Stay</b>			
Mean Nights in the U.S.	23.4 nights	21.3 nights	15.7 nights
Mean Nights in California	12.2 nights	11.7 nights	9.4 nights
% of California Nights	52%	55%	60%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	27%	35%	37%
Average Trips to the U.S. in Past Year	1.7 trips	1.6 trips	1.4 trips
<b>Average Number of States Visited</b>	2.1 states	2.4 states	2.5 states
<b>Average Number of Destinations Visited</b>	3.1 dest.	3.9 dest.	4.2 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	62%	70%	78%
San Francisco	44%	54%	54%
Las Vegas	29%	45%	52%
New York City	16%	22%	20%
San Diego	14%	11%	9%
Anaheim-Santa Ana	8%	4%	3%
Flagstaff-Grand Canyon-Sedona	7%	16%	21%
San Jose	6%	3%	1%
Monterey-Salinas	5%	9%	11%
DC Metro Area	4%	2%	1%
Riverside/San Bernardino	4%	2%	3%
Santa Barbara	4%	5%	6%
Chicago	3%	3%	3%
Oahu	3%	3%	3%
Seattle	3%	2%	3%
Sacramento	3%	3%	3%
Miami	3%	3%	3%

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

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Italy (n = 208)	Leisure Visitors from Italy (n = 158)
<b>Activities Experienced While in the U.S.**</b>			
Shopping	89%	75%	77%
Sightseeing	83%	72%	78%
National Parks/Monuments	52%	60%	64%
Small Towns/Countryside	44%	44%	44%
Experience Fine Dining	43%	25%	21%
Amusement/Theme Parks	40%	29%	29%
Historical Locations	35%	34%	35%
Guided Tours	33%	30%	29%
Art Gallery/Museums	31%	26%	20%
Casino/Gamble	24%	17%	15%
Concert/Play/Musical	21%	10%	11%
Cultural/Ethnic Heritage Sites	20%	26%	28%
<b>Transportation While in the U.S.**</b>			
Air Travel between U.S. Cities	45%	47%	45%
Rented Auto	44%	56%	63%
Auto, Private or Company	38%	31%	31%
City Subway/Tram/Bus	31%	24%	25%
Taxicab/Limousine	31%	22%	22%
Bus between Cities	19%	20%	19%
Ferry/River Taxi/Srt. Scenic Cruise	10%	13%	11%
Railroad between Cities	7%	4%	3%
Rented Bicycle/Motorcycle/Moped	5%	9%	9%
Cruise Ship/River Boat 1+ Nights	4%	5%	6%
Motor Home/Camper	2%	1%	1%
<b>Visitor Spending***</b>			
CA Visitor Spending in the U.S. per Visitor	\$3,590	\$2,866	\$3,051
Per Visitor Per Day (CA)	\$153	\$135	\$194
Per Visitor/Trip (California)	\$1,872	\$1,574	\$1,827
<b>Spending by Category (Per Visitor/Trip)</b>			
Accommodations	30.4%	25.7%	18.9%
Air Transportation in the U.S.	6.6%	5.9%	3.2%
Entertainment	12.5%	11.9%	14.8%
Food/Beverages	18.1%	29.5%	32.7%
Gifts/Souvenirs	21.1%	15.8%	19.0%
Ground Transportation in the U.S.	6.2%	8.5%	8.9%
Other	4.9%	2.6%	2.6%

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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  
(2014 - cont.)**

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<b>Payment Method for Trip Expenses</b>			
Purchases Using Credit Card	44%	53%	51%
Cash from Home/Travelers Checks	27%	24%	26%
Cash Adv./Withdrawal Using Credit Card	18%	16%	16%
Cash Adv./Withdrawal Using Debit Card	6%	4%	3%
Purchases Using Debit Card	6%	4%	4%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	40 years	37 years	37 years
Average Age - Females	38 years	36 years	40 years
<b>Occupation</b>			
Mgmt., Business, Science & Arts	44%	34%	28%
Service Occupations	11%	19%	24%
Student	11%	11%	4%
Sales and Office	11%	12%	14%
Retired	8%	6%	8%
Homemaker	4%	2%	2%
Prod., Trans., & Material Moving	4%	8%	9%
Nat. Res., Const., & Maintenance	3%	4%	5%
Military/Government	2%	3%	3%
Other	2%	3%	5%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	15%	12%	9%
\$20,000 - \$39,999	13%	24%	31%
\$40,000 - \$59,999	14%	19%	22%
\$60,000 - \$79,999	11%	17%	15%
\$80,000 - \$99,999	10%	8%	8%
\$100,000 - \$119,999	9%	4%	-
\$120,000 - \$139,999	6%	7%	7%
\$140,000 - \$159,999	4%	-	-
\$160,000 - \$179,999	3%	2%	1%
\$180,000 - \$199,999	2%	5%	2%
\$200,000 and over	11%	4%	5%
Total	100%	100%	100%
Average Annual Income	\$95,782	\$69,749	\$61,746

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