

CHARACTERISTICS OF TRAVELERS FROM ITALY TO CALIFORNIA – 2010

Italy was one of California’s large overseas markets with approximately 163,000 visitors to California in 2010. Collectively visitors from Italy spent approximately \$169 million in California.

Italian visitors to California during 2010 reported spending \$119 per day during an 8.7 night average stay or approximately \$1,035 per visitor. The average spending for all overseas visitors to California was about \$1,209 (\$107 per day; 11.3 nights in California).

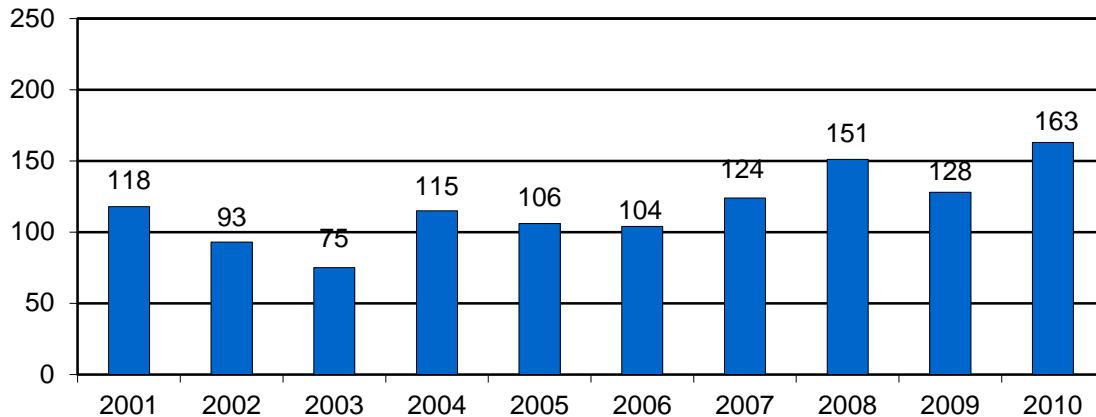
Visitors From Italy

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2000	612,357	27.2%	167,000
2001	472,348	24.9%	118,000
2002	406,160	22.8%	93,000
2003	408,633	18.3%	75,000
2004	470,805	24.5%	115,000
2005	545,546	19.5%	106,000
2006	532,829	19.6%	104,000
2007	634,152	19.6%	124,000
2008	779,463	19.4%	151,000
2009	753,310	17.0%	128,000
2010	838,225	19.4%	163,000

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 Italy to CA, 2001-2010 (in 000s)



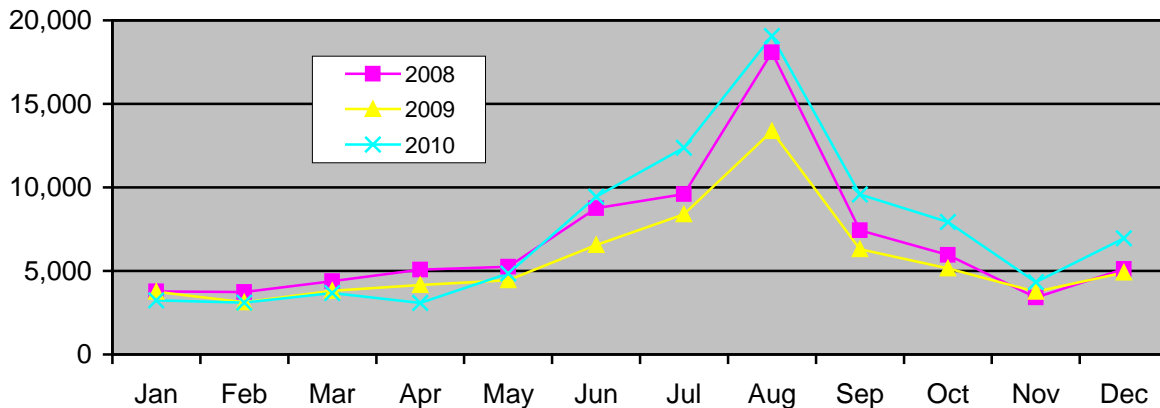
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 75,000 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 17% in 2009. The volume of visitors from Italy to California has experienced some growth since 2003, reaching 163,000 visitors in 2010. However, the volume and market share (19%) 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 mostly consistent in 2010 with 2008 after declining in several months of 2009. 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 and November and December.

**Residents of Italy
Monthly Port of Entry Arrivals to CA
2008-2010**



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 leisure/recreation/holiday purposes
- Plan and book their air trip with a travel agent
- Sit in economy/tourist/coach class
- Use an inclusive travel package
- Travel with their spouse
- Stay in a hotel/motel
- Be on their first trip to the U.S.
- Visit San Francisco, Las Vegas, and New York City
- Visit historical places, visit national parks and visit small towns
- Rent an auto for transportation while in the U.S.
- Have a lower average annual household income

Conversely, visitors from Italy are less likely to:

- Travel to California to visit friends or relatives
- Travel alone
- Stay in a private home
- Tour the countryside
- Make use of a company or private auto for transportation while in the U.S.
- Tour the countryside

Characteristics of Travelers from Italy to California – 2010

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Italy (n = 207)	Leisure Visitors from Italy (n = 162)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	48%	68%	85%
Visit Friends/Relatives	22%	12%	15%
Business/Professional	21%	12%	-
Convention/Conference	5%	3%	-
Other Purpose	5%	5%	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	67%	81%	92%
Visit Friends/Relatives	39%	23%	26%
Business/Professional	24%	14%	1%
Convention/Conference	9%	4%	1%
Sources Used to Plan Trip**			
Personal Computer	44%	38%	39%
Travel Agency	40%	58%	62%
Airlines Directly	23%	12%	13%
Friends/Relatives	17%	13%	15%
Travel Guides	10%	9%	10%
Corporate Travel Department	8%	1%	1%
Tour Company	5%	1%	1%
State/City Travel Office	4%	4%	3%
Newspapers/Magazines	3%	-	-
Advance Planning for Trip			
7 days or less	6%	5%	4%
8 - 30 days	28%	20%	16%
31 - 60 days	20%	24%	19%
61 - 90 days	12%	11%	14%
More than 3 Months	34%	40%	47%
Total	100%	100%	100%
Average Planning Time in Days	98 days	107 days	120 days
Advance Airline Reservations			
7 days or less	12%	7%	5%
8 - 30 days	38%	33%	28%
31 - 60 days	17%	16%	17%
61 - 90 days	10%	12%	13%
91 - 120 days	7%	13%	14%
121 - 180 days	10%	13%	15%
6 Months or More	7%	7%	9%
Total	100%	100%	100%
Average Booking in Days	68 days	80 days	89 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 Italy to California
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Italy (n = 207)	Leisure Visitors from Italy (n = 162)
Means of Booking Air Trip			
Travel Agent	46%	58%	57%
Personal Computer	26%	26%	26%
Airlines Directly	13%	4%	3%
Corporate Travel Department	8%	2%	1%
Tour Operator	4%	9%	11%
Travel Club	1%	-	-
Other/Don't Know	2%	2%	1%
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	29%	24%	22%
Schedule	14%	21%	22%
Non-Stop Flight	14%	13%	16%
Mileage Bonus/Frequent Flyer Program	10%	4%	3%
Previous Good Experience	9%	12%	7%
Safety Reputation	8%	9%	10%
Airline Loyalty	4%	2%	1%
In-flight Service	4%	2%	3%
Employer policy	3%	2%	2%
Other	6%	12%	14%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	84%	96%	96%
Executive/Business	15%	3%	4%
First Class	2%	1%	-
Total	100%	100%	100%
Use of Package			
Yes	14%	29%	36%
No	86%	71%	64%
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	7%	4%
8 - 30 days	27%	34%	35%
31 - 60 days	15%	17%	17%
61 - 90 days	10%	7%	8%
91 - 120 days	11%	8%	9%
121 - 180 days	20%	12%	12%
6 Months or More	14%	15%	15%
Total	100%	100%	100%

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

Sources: International Trade Administration Office of Travel and Tourism Industries
"Survey of International Air Travelers."

**Characteristics of Travelers from Italy to California
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Italy (n = 207)	Leisure Visitors from Italy (n = 162)
Travel Companions**			
Traveling Alone	39%	26%	16%
Spouse	27%	37%	44%
Family/Relatives	25%	26%	28%
Friends	11%	16%	19%
Business Associates	8%	3%	-
Tour Group	2%	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	78%	86%	87%
Private Home	29%	18%	18%
Other	4%	2%	2%
Length of Stay			
Mean Nights in the U.S.	22.8 nights	16.6 nights	16.4 nights
Mean Nights in California	11.3 nights	8.7 nights	8.0 nights
% of California Nights	50%	52%	49%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	27%	46%	53%
Average Trips to the U.S. in Past Year	1.8 trips	1.3 trips	1.2 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	2.8 trips	2.3 trips
Average Number of States Visited	2.1 states	2.4 states	2.6 states
Average Number of Destinations Visited	3.0 dest.	3.7 dest.	4.2 dest.
Places Visited in the U.S.**			
Los Angeles	60%	68%	76%
San Francisco	47%	61%	50%
Las Vegas	29%	48%	59%
New York City	16%	28%	32%
San Diego	14%	19%	14%
Flagstaff	8%	17%	22%
Anaheim-Santa Ana	7%	3%	2%
Grand Canyon	5%	13%	16%
San Jose	5%	1%	3%
DC Metro Area	5%	3%	2%
Yosemite	4%	12%	6%
Chicago	4%	2%	2%
Monterey-Salinas	4%	9%	11%
Miami	4%	4%	5%
Riverside/San Bernardino	4%	1%	1%
Seattle	3%	1%	2%
Sacramento	3%	2%	3%

* 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 Italy to California
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Italy (n = 207)	Leisure Visitors from Italy (n = 162)
Activities Experienced While in the U.S.**			
Shopping	88%	82%	82%
Dining Out	85%	84%	83%
Sightseeing in Cities	57%	53%	49%
Historical Places	47%	60%	60%
Amusement/Theme Parks	40%	45%	50%
National Parks	38%	56%	61%
Visiting Small Towns	38%	53%	61%
Cultural Heritage Sites	31%	38%	42%
Touring Countryside	31%	20%	22%
Art Gallery/Museum	26%	29%	31%
Casinos/Gambling	25%	31%	38%
Guided Tours	23%	24%	24%
Transportation While in the U.S.**			
Rented Auto	41%	56%	56%
Taxi/Limousine	39%	43%	45%
Airlines in U.S.	37%	42%	45%
Company or Private Auto	28%	10%	10%
City Subway/Tram/Bus	25%	27%	28%
Railroad between Cities	12%	6%	3%
Bus between Cities	10%	12%	12%
Motor Home/Camper	2%	-	-
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,797	\$3,492	\$3,791
Per Visitor/Trip (U.S.)	\$2,435	\$1,969	\$1,958
Per Visitor Per Day	\$107	\$119	\$119
Per Visitor/Trip (California)	\$1,209	\$1,035	\$952
Spending by Category (Per Visitor/Trip)			
Lodging	\$661	\$498	\$414
Food/Beverages	\$514	\$500	\$525
Gifts/Souvenirs	\$421	\$305	\$325
Transportation in the U.S.	\$384	\$358	\$372
Entertainment	\$243	\$218	\$239
Expenses at the Airport	\$34	\$26	\$10
Other	\$179	\$64	\$73
Total Spending Per Visitor/Trip	\$2,435	\$1,969	\$1,958

* 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 Italy to California
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from Italy (n = 207)	Leisure Visitors from Italy (n = 162)
Payment Method for Trip Expenses			
Credit Cards	52%	58%	54%
Cash	39%	37%	40%
Debit Cards	7%	4%	4%
Travelers Checks	1%	2%	2%
Total	100%	100%	100%
Age			
Average Age - Males	43 years	39 years	40 years
Average Age - Females	40 years	34 years	34 years
Occupation			
Professional/Technical	33%	37%	34%
Manager/Executive	29%	21%	18%
Student	10%	10%	8%
Retired	9%	3%	3%
Clerical/Sales	8%	17%	20%
Other	12%	14%	16%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	8%	9%	8%
\$20,000 - \$39,999	13%	28%	30%
\$40,000 - \$59,999	14%	21%	18%
\$60,000 - \$79,999	13%	14%	17%
\$80,000 - \$99,999	11%	7%	8%
\$100,000 - \$119,999	11%	6%	7%
\$120,000 - \$139,999	7%	5%	5%
\$140,000 - \$159,999	6%	3%	2%
\$160,000 - \$179,999	3%	-	-
\$180,000 - \$199,999	3%	4%	4%
\$200,000 and over	13%	3%	2%
Total	100%	100%	100%
Average Annual Income	\$96,200	\$67,600	\$65,900

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

Sources: International Trade Administration Office of Travel and Tourism Industries

"Survey of International Air Travelers."