

CHARACTERISTICS OF TRAVELERS FROM ITALY TO CALIFORNIA – 2008

Italy was one of California’s large overseas markets with approximately 151,000 visitors to California in 2008. Collectively visitors from Italy spent approximately \$152 million in California.

Italian visitors to California during 2008 reported spending \$124 per day during an 8.1 night average stay or approximately \$1,004 per visitor. The average spending for all overseas visitors to California was about \$1,353 (\$123 per day; 11.0 nights in California).

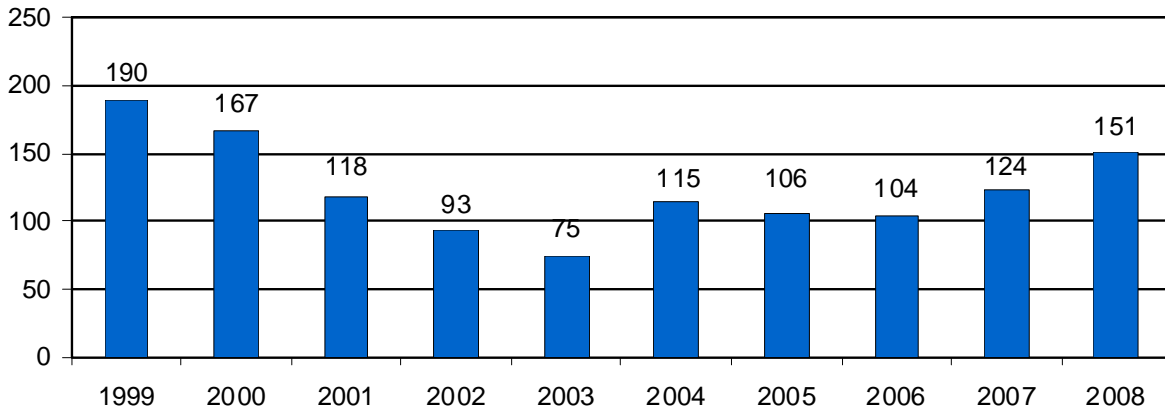
Visitors From Italy

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1998	610,796	31.7%	194,000
1999	626,217	30.3%	190,000
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

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, 1999-2008
(in 000s)**



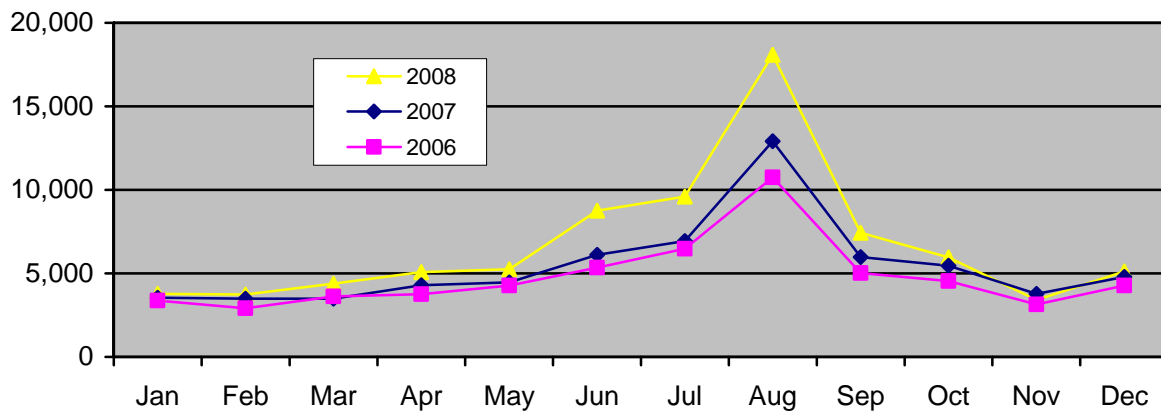
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 rising 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 18% in 2003. The volume of visitors from Italy to California has experienced some growth since 2003 and reached 151,000 visitors in 2008, but the volume and market share of Italian visitors to California remains substantially 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 2008 compared with 2006 and 2007. There was an increase in passenger arrivals from Italy during the summer of 2008, particularly in August. In all 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
2006-2008**



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
- Use a travel agent for their trip planning and booking their air trip
- Mention airfare as the main factor in choosing an airline
- Travel in economy/tourist/coach
- Make use of a travel package on their trip
- Be making their first trip to the US
- Visit San Francisco, Las Vegas, New York City, San Diego, and the Grand Canyon
- Visit historical places, national parks, art galleries or museums, and 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 for business or to visit friends or relatives
- Plan as well as book their trip directly with the airlines
- Stay in a private home
- Make use of a company or private auto for transportation while in the U.S.

Characteristics of Travelers from Italy to California – 2008

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Italy (n = 266)	Leisure Visitors from Italy (n = 184)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	43%	64%	93%
Visit Friends/Relatives	19	5	7
Business/Professional	27	19	-
Convention/Conference	7	7	-
Other Purpose	5	6	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	63%	73%	95%
Visit Friends/Relatives	37	20	20
Business/Professional	31	22	2
Convention/Conference	11	9	1
Sources Used to Plan Trip**			
Airlines Directly	21%	10%	11%
Corporate Travel Department	11	6	1
Personal Computer	42	41	40
Friends/Relatives	16	13	13
Newspapers/Magazines	3	2	3
State/City Travel Office	4	6	7
Tour Company	6	3	4
Travel Agency	43	54	50
Travel Guides	10	9	11
Advance Planning for Trip			
7 days or less	9%	4%	1%
8 - 30 days	30	28	22
31 - 60 days	19	19	14
61 - 90 days	13	15	19
More than 3 Months	30	35	44
Total	100%	100%	100%
Average Planning Time in Days	92	92	
Advance Airline Reservations			
7 days or less	16%	7%	1%
8 - 30 days	38	39	33
31 - 60 days	17	17	19
61 - 90 days	10	17	20
91 - 120 days	5	9	13
121 - 180 days	8	10	13
6 Months or More	6	1	2
Total	100%	100%	100%
Average Booking in Days	60	61	75

* 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
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Italy (n = 266)	Leisure Visitors from Italy (n = 184)
Means of Booking Air Trip			
Airlines Directly	12%	2%	2%
Corporate Travel Department	11	7	1
Personal Computer	22	26	30
Travel Agent	48	54	54
Travel Club	1	1	0
Tour Operator	4	9	11
Other/Don't Know	3	2	2
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	24%	38%	42%
Schedule	15	13	5
Non-Stop Flight	13	6	9
Mileage Bonus/Frequent Flyer Program	12	11	6
Previous Good Experience	10	11	14
Safety Reputation	7	9	12
Airline Loyalty	4	1	-
In-flight Service	5	3	5
Employer policy	4	2	-
Other	6	6	7%
Airline Seating Area			
Economy/Tourist/Coach	77%	85%	89%
Executive/Business	20	14	11
First Class	3	1	1
Total	100%	100%	100%
Use of Package			
Yes	11%	24%	25%
No	89	76	75
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	12%	-
8 - 30 days	26	15	11%
31 - 60 days	23	28	38
61 - 90 days	12	13	14
91 - 120 days	5	18	24
121 - 180 days	17	13	14
6 Months or More	14	0	0
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
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Italy (n = 266)	Leisure Visitors from Italy (n = 184)
Travel Companions**			
Business Associates	10%	5%	-
Family/Relatives	23	27	35%
Friends	12	17	24
Spouse	27	29	38
Tour Group	2	2	2
Traveling Alone	39	36	22
Average Travel Party Size	1.5	1.6	1.9
Median Travel Party Size	1.0	1.0	1.0
Type of Lodging**			
Hotel / Motel	78%	84%	86%
Private Home	28	20	20
Other	4	3	2
Length of Stay			
Mean Nights in the U.S.	21.2	18.9	15.8
Mean Nights in California	11.0	8.1	7.7
% of California Nights	52%	43%	49%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	24%	34%	43%
Average Trips to the U.S. in Past Year	2.0	1.6	1.2
Average Trips to the U.S. in Past 5 Years	6.3	4.2	2.9
Average Number of States Visited	2.0	2.6	2.9
Average Number of Destinations Visited	2.9	3.9	4.4
Places Visited in the U.S.**			
Los Angeles	53%	57%	67%
San Francisco	49	61	65
Las Vegas	28	40	52
New York City	17	34	40
San Diego	13	21	22
San Jose	7	3	1
Anaheim-Santa Ana	7	3	1
Yosemite	5	7	10
Grand Canyon	4	17	24
Chicago	4	3	3
DC Metro Area	4	3	3
Monterey-Salinas	4	7	9
Seattle	3	0	-
Sacramento	3	0	0
Riverside/San Bernardino	3	5	7
Santa Barbara	3	4	6
Oakland	3	4	1

* 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
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Italy (n = 266)	Leisure Visitors from Italy (n = 184)
Activities Experienced While in the U.S.**			
Dining Out	87%	79%	71%
Shopping	85	82	83
Sightseeing in Cities	53	55	64
Historical Places	44	59	69
Visiting Small Towns	36	51	65
National Parks	35	51	66
Amusement/Theme Parks	34	40	48
Touring Countryside	30	29	27
Cultural Heritage Sites	28	31	32
Casinos/Gambling	24	18	23
Art Gallery/Museum	23	37	43
Guided Tours	22	15	20
Transportation While in the U.S.**			
Taxi/Limousine	42%	41%	40%
Airlines in U.S.	40	44	40
Rented Auto	36	55	57
Company or Private Auto	28	19	17
City Subway/Tram/Bus	26	33	37
Railroad between Cities	11	9	12
Bus between Cities	9	13	16
Motor Home/Camper	2	-	-
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,998	\$3,732	\$3,940
Per Visitor/Trip (U.S.)	2,607	2,335	2,024
Per Visitor Per Day	123	124	128
Per Visitor/Trip (California)	\$1,353	\$1,004	\$986
Spending by Category (Per Visitor/Trip)			
Lodging	\$800	\$792	\$574
Food/Beverages	526	463	469
Gifts/Souvenirs	450	418	399
Transportation in the U.S.	425	392	357
Entertainment	234	172	174
Expenses at the Airport	37	25	18
Other	135	72	32
Total Spending Per Visitor/Trip	\$2,607	\$2,335	\$2,024

* 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
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from Italy (n = 266)	Leisure Visitors from Italy (n = 184)
Payment Method for Trip Expenses			
Credit Cards	53%	60%	56%
Cash	37	35	39
Debit Cards	6	5	5
Travelers Checks	3	0	1
Total	100%	100%	100%
Age			
Average Age - Males	41	41	41
Average Age - Females	38	36	37
Occupation			
Manager/Executive	34%	27%	21%
Professional/Technical	32	41	45
Student	8	7	4
Clerical/Sales	7	12	15
Retired	6	3	5
Other	13	9	10
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	6%	7%	8%
\$20,000 - \$39,999	10	17	17
\$40,000 - \$59,999	13	13	11
\$60,000 - \$79,999	11	12	12
\$80,000 - \$99,999	11	11	11
\$100,000 - \$119,999	11	11	8
\$120,000 - \$139,999	7	6	6
\$140,000 - \$159,999	6	6	8
\$160,000 - \$179,999	4	5	7
\$180,000 - \$199,999	3	2	2
\$200,000 and over	18	11	12
Total	100%	100%	100%
Average Annual Income	\$107,200	\$93,600	\$97,400

* 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."