

CHARACTERISTICS OF TRAVELERS FROM ITALY TO CALIFORNIA – 2009

Italy was one of California’s large overseas markets with approximately 129,000 visitors to California in 2009. Collectively visitors from Italy spent approximately \$192 million in California.

Italian visitors to California during 2009 reported spending \$135 per day during an 11.0 night average stay or approximately \$1,485 per visitor. The average spending for all overseas visitors to California was about \$1,205 (\$103 per day; 11.7 nights in California).

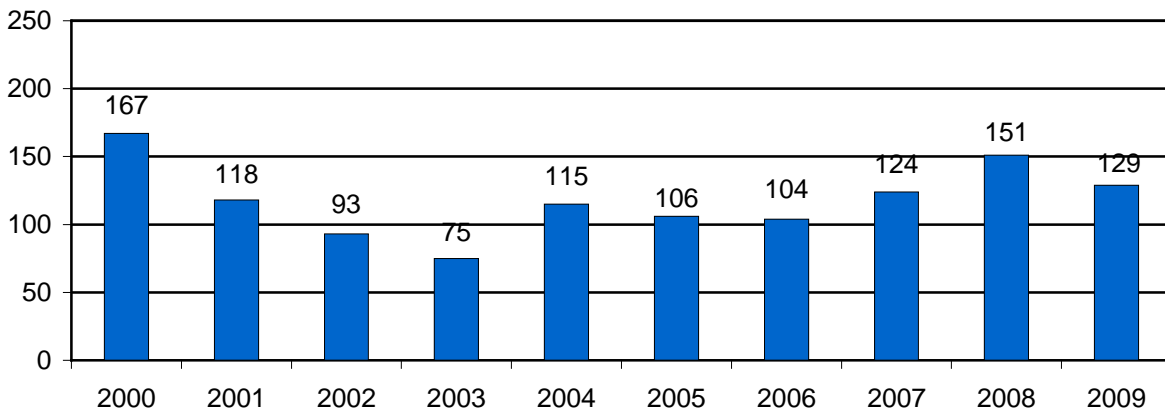
Visitors From Italy

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
2009	753,310	17.1%	129,000

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, 2000-2009 (in 000s)



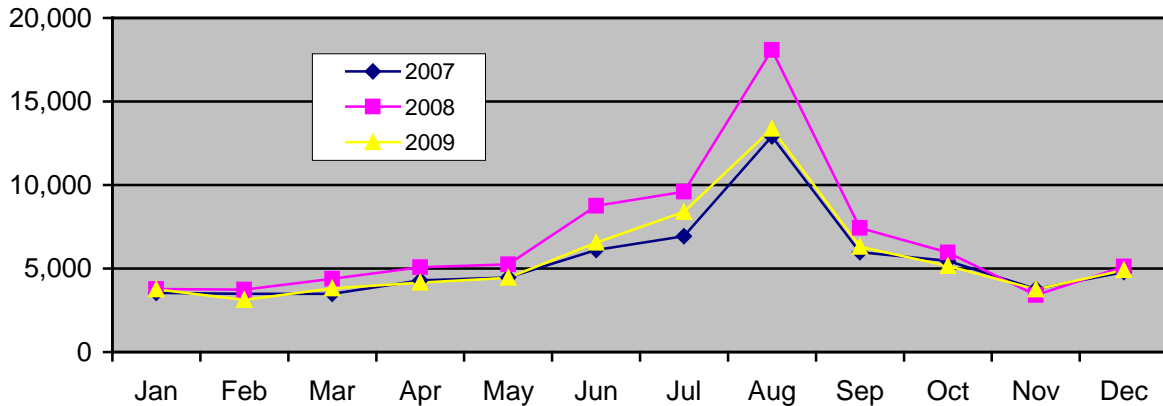
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 151,000 visitors in 2008 but dropping to 129,000 visitors in 2009. However, 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 2009 with 2007 after having increased in several months of 2008. 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
2007-2009**



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
- Visit San Francisco, Las Vegas, and New York City
- Visit national parks and small towns
- Rent an auto for transportation while in the U.S.
- Spend a higher proportion of their travel expenses on lodging
- Pay for travel expenses with credit cards
- Have a lower average annual household income

Conversely, visitors from Italy are less likely to:

- Travel to California to visit friends or relatives
- 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 – 2009

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Italy (n = 254)	Leisure Visitors from Italy (n = 182)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	47%	63%	91%
Business/Professional	22%	17%	-
Visit Friends/Relatives	21%	7%	10%
Convention/Conference	6%	3%	-
Other Purpose	5%	10%	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	65%	71%	94%
Visit Friends/Relatives	37%	18%	22%
Business/Professional	26%	21%	1%
Convention/Conference	8%	7%	2%
Sources Used to Plan Trip**			
Airlines Directly	23%	16%	16%
Corporate Travel Department	8%	5%	-
Personal Computer	43%	44%	46%
Friends/Relatives	18%	13%	15%
Newspapers/Magazines	3%	6%	3%
State/City Travel Office	4%	6%	6%
Tour Company	7%	2%	4%
Travel Agency	40%	45%	44%
Travel Guides	10%	9%	12%
Advance Planning for Trip			
7 days or less	7%	3%	1%
8 - 30 days	28%	27%	19%
31 - 60 days	19%	23%	22%
61 - 90 days	12%	14%	17%
More than 3 Months	34%	32%	42%
Total	100%	100%	100%
Average Planning Time in Days	100 days	94 days	113 days
Advance Airline Reservations			
7 days or less	13%	4%	2%
8 - 30 days	38%	42%	29%
31 - 60 days	16%	20%	23%
61 - 90 days	10%	11%	14%
91 - 120 days	6%	7%	10%
121 - 180 days	10%	12%	16%
6 Months or More	7%	4%	5%
Total	100%	100%	100%
Average Booking in Days	67 days	67 days	82 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
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Italy (n = 254)	Leisure Visitors from Italy (n = 182)
Means of Booking Air Trip			
Airlines Directly	13%	7%	10%
Corporate Travel Department	9%	4%	-
Personal Computer	25%	34%	38%
Travel Agent	46%	44%	40%
Travel Club	1%	-	-
Tour Operator	5%	9%	11%
Other/Don't Know	2%	1%	2%
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	32%	36%	39%
Schedule	13%	21%	16%
Non-Stop Flight	12%	7%	10%
Mileage Bonus/Frequent Flyer Program	10%	9%	8%
Previous Good Experience	9%	8%	8%
Safety Reputation	6%	9%	10%
Airline Loyalty	4%	1%	-
In-flight Service	5%	-	-
Employer policy	3%	1%	-
Other	6%	8%	9%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	81%	84%	87%
Executive/Business	17%	15%	12%
First Class	2%	1%	2%
Total	100%	100%	100%
Use of Package			
Yes	14%	16%	19%
No	86%	84%	81%
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	11%	4%
8 - 30 days	24%	15%	16%
31 - 60 days	13%	42%	50%
61 - 90 days	13%	10%	7%
91 - 120 days	8%	8%	10%
121 - 180 days	18%	14%	13%
6 Months or More	20%	-	-
Total	100%	100%	100%

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**Characteristics of Travelers from Italy to California
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Italy (n = 254)	Leisure Visitors from Italy (n = 182)
Travel Companions**			
Business Associates	8%	3%	-
Family/Relatives	25%	24%	-
Friends	11%	20%	28%
Spouse	28%	32%	40%
Tour Group	2%	2%	1%
Traveling Alone	38%	33%	19%
Average Travel Party Size	1.6	1.6	1.9
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	83%	87%
Private Home	30%	21%	17%
Other	4%	4%	5%
Length of Stay			
Mean Nights in the U.S.	22.4 nights	20.8 nights	16.0 nights
Mean Nights in California	11.7 nights	11.0 nights	7.6 nights
% of California Nights	52%	53%	48%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	27%	37%
Average Trips to the U.S. in Past Year	1.7 trips	1.6 trips	1.3 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	4.5 trips	3.1 trips
Average Number of States Visited	2.1 states	2.5 states	2.9 states
Average Number of Destinations Visited	3.0 dest.	3.6 dest.	4.3 dest.
Places Visited in the U.S.**			
Los Angeles	55%	55%	66%
San Francisco	48%	57%	64%
Las Vegas	30%	42%	56%
New York City	18%	33%	40%
San Diego	13%	17%	20%
Anaheim-Santa Ana	7%	2%	1%
Grand Canyon	7%	12%	17%
San Jose	6%	2%	-
Yosemite	4%	9%	12%
Chicago	4%	3%	3%
DC Metro Area	4%	2%	2%
Monterey-Salinas	4%	6%	9%
Riverside/San Bernardino	4%	6%	3%
Seattle	3%	-	-
Sacramento	3%	2%	2%
Santa Barbara	3%	5%	5%
Oakland	2%	4%	1%

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Activities Experienced While in the U.S.**			
Shopping	87%	83%	85%
Dining Out	86%	81%	77%
Sightseeing in Cities	56%	48%	60%
Historical Places	45%	53%	66%
National Parks	39%	55%	70%
Amusement/Theme Parks	39%	39%	48%
Visiting Small Towns	38%	49%	64%
Cultural Heritage Sites	32%	27%	32%
Touring Countryside	31%	27%	31%
Casinos/Gambling	27%	21%	30%
Art Gallery/Museum	26%	30%	35%
Guided Tours	24%	18%	25%
Transportation While in the U.S.**			
Airlines in U.S.	39%	41%	40%
Taxi/Limousine	39%	34%	34%
Rented Auto	38%	62%	70%
Company or Private Auto	29%	15%	10%
City Subway/Tram/Bus	26%	33%	38%
Railroad between Cities	11%	6%	8%
Bus between Cities	10%	9%	11%
Motor Home/Camper	2%	1%	1%
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,584	\$4,590	\$5,072
Per Visitor/Trip (U.S.)	\$2,308	\$2,811	\$2,639
Per Visitor Per Day	\$103	\$135	\$165
Per Visitor/Trip (California)	\$1,205	\$1,485	\$1,254
Spending by Category (Per Visitor/Trip)			
Lodging	\$660	\$935	\$819
Food/Beverages	\$463	\$684	\$633
Gifts/Souvenirs	\$395	\$339	\$356
Transportation in the U.S.	\$348	\$483	\$455
Entertainment	\$234	\$265	\$337
Expenses at the Airport	\$34	\$17	\$14
Other	\$174	\$88	\$26
Total Spending Per Visitor/Trip	\$2,308	\$2,811	\$2,639

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Payment Method for Trip Expenses			
Credit Cards	50%	62%	56%
Cash	41%	34%	39%
Debit Cards	7%	4%	5%
Travelers Checks	2%	-	1%
Total	100%	100%	100%
Age			
Average Age - Males	43 years	41 years	39 years
Average Age - Females	39 years	36 years	36 years
Occupation			
Professional/Technical	35%	37%	32%
Manager/Executive	28%	23%	23%
Student	10%	10%	6%
Retired	8%	6%	8%
Clerical/Sales	7%	11%	14%
Other	13%	14%	16%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	9%	12%	7%
\$20,000 - \$39,999	14%	22%	23%
\$40,000 - \$59,999	14%	8%	10%
\$60,000 - \$79,999	13%	14%	16%
\$80,000 - \$99,999	11%	9%	9%
\$100,000 - \$119,999	9%	7%	7%
\$120,000 - \$139,999	6%	4%	4%
\$140,000 - \$159,999	5%	11%	8%
\$160,000 - \$179,999	3%	1%	2%
\$180,000 - \$199,999	3%	3%	5%
\$200,000 and over	12%	9%	10%
Total	100%	100%	100%
Average Annual Income	\$94,800	\$85,000	\$89,400

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