

CHARACTERISTICS OF TRAVELERS FROM ITALY TO CALIFORNIA – 2015

Italy was one of California’s large overseas markets with approximately 176,000 visitors to California in 2015 (down slightly from 178,000 in 2014). Collectively visitors from Italy spent approximately \$325 million in California (up from \$280 million in 2014).

Italian visitors to California during 2015 reported spending \$126 per day during an 14.6 night average stay or approximately \$1,841 per visitor. The average spending for all overseas visitors to California was about \$1,979 (\$157 per day; 12.6 nights in California).

Visitors From Italy

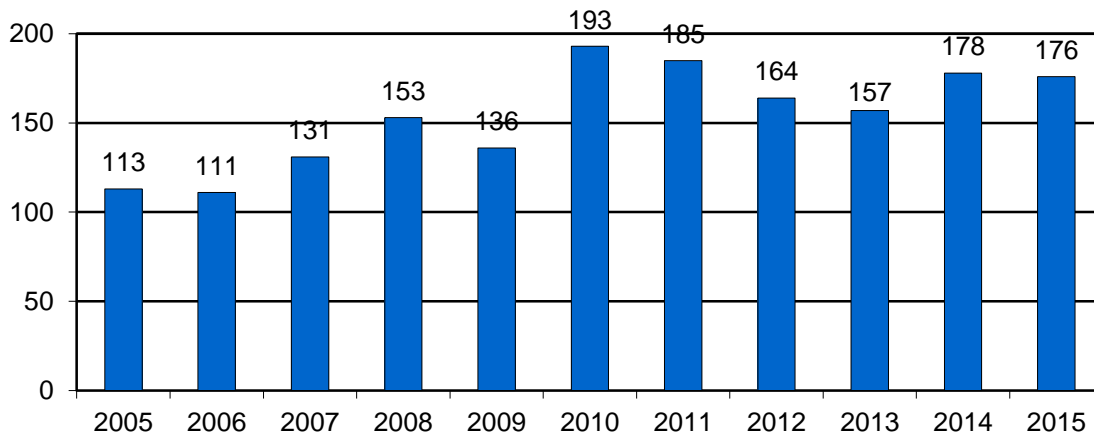
Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2005	545,546	20.7%	113,000
2006	532,829	20.8%	111,000
2007	634,152	20.7%	131,000
2008	779,463	19.6%	153,000
2009	753,310	18.1%	136,000
2010	838,225	23.0%	193,000
2011	891,571	20.7%	185,000
2012	831,343	19.7%	164,000
2013	838,883	18.7%	157,000
2014 ³	934,066	19.1%	178,000
2015 ³	899,595	19.6%	176,000

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

2) U.S. Dept. of Commerce, NTTO, "Survey of International Air Travelers."

3) Sourced from Tourism Economics.

Number of Visitors from Italy to CA, 2005-2015 (in 000s)



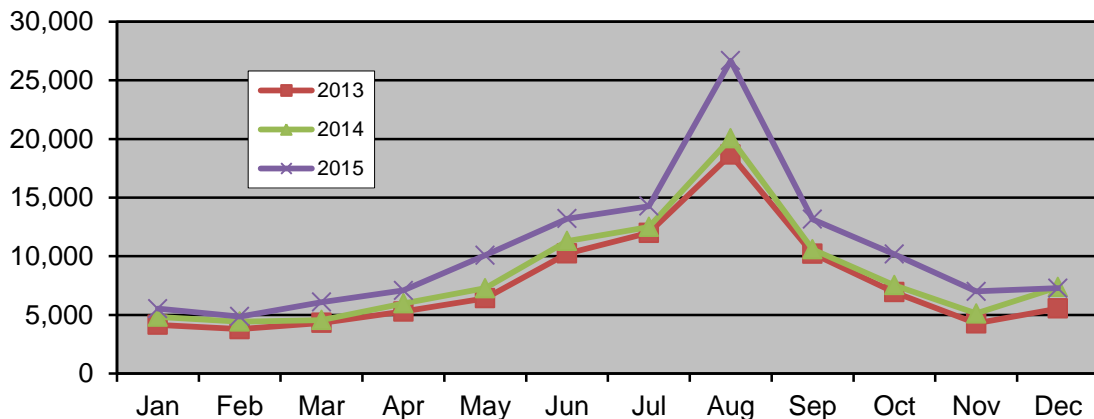
Sources: U.S. Dept. of Commerce, National Travel and Tourism Office,
Revised by Tourism Economics for Visit California (October, 2015).

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 less than 20% in 2015. 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 increasing to 178,000 in 2014 and 176,000 in 2015. The volume and market share (19.6%) 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 higher in 2015 when compared with 2014 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, February and March as well as November and December.

**Residents of Italy
Monthly Port of Entry Arrivals to CA
2013-2015**



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
- Travel in economy/tourist/coach seating on their air trip to the U.S.
- Visit San Francisco, Las Vegas, and Flagstaff/the Grand Canyon/Sedona
- Visit national parks/monuments
- 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.
- Have a lower average annual income

Conversely, visitors from Italy are less likely to:

- Travel to California primarily to visit friends or relatives
- Select an airline based on non-stop flights
- Go shopping or experience fine dining
- Spend a lower proportion of their travel dollars on gifts/souvenirs in the U.S.

Characteristics of Travelers from Italy to California – 2015

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Italy (n = 246)	Leisure Visitors from Italy (n = 164)
Primary Purpose of Trip			
Vacation/Holidays	54%	65%	82%
Visit Friends/Relatives	18%	14%	18%
Business	13%	9%	-
Convention/Conference	9%	6%	-
Other Purpose	6%	1%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	67%	77%	92%
Visit Friends/Relatives	34%	23%	23%
Business	17%	12%	3%
Convention/Conference	12%	10%	-
Sources Used to Plan Trip**			
Airline	43%	37%	36%
Online Travel Agency	34%	31%	32%
Personal Recommendation	29%	27%	31%
Travel Agency Office	23%	25%	24%
Travel Guide	15%	10%	11%
Corporate Travel Department	12%	8%	4%
Tour Operator/Travel Club	9%	13%	15%
National/State/City Travel Office	7%	16%	17%
Advance Planning for Trip			
7 days or less	5%	3%	1%
8 - 30 days	24%	23%	17%
31 - 60 days	19%	18%	18%
61 - 90 days	15%	17%	17%
More than 3 Months	38%	39%	47%
Total	100%	100%	100%
Average Planning Time in Days	108 days	109 days	124 days
Advance Airline Reservations			
7 days or less	8%	5%	2%
8 - 30 days	33%	37%	29%
31 - 60 days	20%	17%	16%
61 - 90 days	13%	14%	15%
91 - 120 days	9%	7%	9%
121 - 180 days	10%	12%	15%
6 Months or More	8%	10%	14%
Total	100%	100%	100%
Average Booking in Days	76 days	83 days	100 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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from Italy (n = 246)	Leisure Visitors from Italy (n = 164)
Means of Booking Air Trip**			
Airlines Directly	31%	30%	32%
Internet Booking Service	29%	26%	29%
Travel Agency Office	26%	31%	30%
Corporate Travel Department	12%	6%	1%
Tour Operator/Travel Club	9%	15%	15%
Other	1%	1%	1%
Main Factor in Selecting Airline			
Airfare	29%	33%	29%
Non-Stop Flights	17%	7%	6%
Convenient Schedule	15%	28%	26%
Previous Good Experience	9%	10%	13%
Mileage Bonus/Frequent Flyer Program	8%	6%	7%
Safety Reputation	9%	7%	9%
Loyalty to Carrier	3%	3%	3%
In-flight Service Reputation	3%	<1%	<1%
Employer policy	3%	1%	-
On-time Reputation	2%	4%	6%
Other	3%	2%	1%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	82%	91%	85%
Premium Economy	10%	5%	9%
Executive/Business	8%	3%	5%
First Class	1%	<1%	1%
Total	100%	100%	100%
Use of Package			
Yes	14%	18%	20%
No	86%	82%	80%
Total	100%	100%	100%
Travel Package Includes**			
Attractions/Events/Entertainment	6%	3%	4%
Meals	6%	4%	5%
Bus/Coach	6%	7%	9%
Guided Tours	6%	6%	8%
Rental Car	4%	9%	11%
Tour Guide for Entire Trip	5%	4%	5%
Airfare and Accommodation Only	3%	4%	2%
Cruise	2%	<1%	1%
Recreation	1%	<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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from Italy (n = 246)	Leisure Visitors from Italy (n = 164)
Travel Companions**			
Traveling Alone	59%	54%	43%
Spouse/Partner	22%	29%	37%
Family/Relatives	15%	12%	17%
Friends	6%	6%	7%
Business Associates	4%	2%	-
Tour Group	1%	<1%	1%
Average Travel Party Size	1.7	1.7	2.0
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	73%	75%	71%
Private Home	32%	29%	32%
Other	6%	3%	3%
Length of Stay			
Mean Nights in the U.S.	22.6 nights	24.2 nights	22.3 nights
Mean Nights in California	12.6 nights	14.6 nights	12.7 nights
% of California Nights	52%	60%	57%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	36%	36%
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	2.3 states	2.5 states
Average Number of Destinations Visited	3.1 dest.	3.7 dest.	4.2 dest.
Places Visited in the U.S.**			
Los Angeles	60%	64%	71%
San Francisco	45%	55%	63%
Las Vegas	30%	38%	44%
New York City	15%	18%	22%
San Diego	14%	20%	19%
Anaheim-Santa Ana	8%	3%	1%
Flagstaff-Grand Canyon-Sedona	7%	20%	24%
San Jose	6%	2%	1%
DC Metro Area	5%	4%	4%
Monterey-Salinas	5%	8%	9%
Santa Barbara	4%	3%	3%
Riverside/San Bernardino	4%	4%	4%
Oahu	3%	3%	4%
Seattle	3%	3%	4%
Chicago	3%	4%	2%
Miami	2%	4%	2%
Sacramento	2%	3%	3%

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** 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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from Italy (n = 246)	Leisure Visitors from Italy (n = 164)
Activities Experienced While in the U.S.**			
Shopping	87%	77%	78%
Sightseeing	83%	76%	81%
National Parks/Monuments	51%	61%	65%
Small Towns/Countryside	42%	48%	56%
Experience Fine Dining	40%	21%	20%
Amusement/Theme Parks	39%	33%	35%
Historical Locations	34%	35%	39%
Guided Tours	31%	29%	32%
Art Gallery/Museums	33%	30%	29%
Casino/Gamble	24%	19%	23%
Cultural/Ethnic Heritage Sites	20%	23%	25%
Concert/Play/Musical	20%	20%	22%
Transportation While in the U.S.**			
Rented Auto	44%	51%	55%
Air Travel between U.S. Cities	44%	42%	41%
Auto, Private or Company	37%	39%	39%
City Subway/Tram/Bus	31%	37%	40%
Taxicab/Limousine	31%	24%	21%
Bus between Cities	19%	19%	19%
Ferry/River Taxi/Srt. Scenic Cruise	10%	17%	23%
Railroad between Cities	7%	7%	6%
Rented Bicycle/Motorcycle/Moped	5%	12%	15%
Cruise Ship/River Boat 1+ Nights	4%	3%	4%
Motor Home/Camper	2%	6%	8%
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,401	\$3,186	\$3,098
Per Visitor Per Day (CA)	\$157	\$126	\$142
Per Visitor/Trip (California)	\$1,979	\$1,841	\$1,804
Spending by Category (Per Visitor/Trip)			
Accommodations	31.5%	31.5%	27.9%
Air Transportation in the U.S.	5.9%	4.1%	4.3%
Entertainment	12.9%	13.8%	13.0%
Food/Beverages	19.9%	23.4%	25.0%
Gifts/Souvenirs	19.2%	14.6%	16.7%
Ground Transportation in the U.S.	6.3%	9.3%	10.0%
Other	4.2%	3.0%	3.1%

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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
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,348)	All Visitors from Italy (n = 246)	Leisure Visitors from Italy (n = 164)
Payment Method for Trip Expenses			
Purchases Using Credit Card	43%	51%	48%
Cash from Home/Travelers Checks	27%	20%	22%
Cash Adv./Withdrawal Using Credit Card	18%	22%	22%
Cash Adv./Withdrawal Using Debit Card	6%	5%	5%
Purchases Using Debit Card	6%	3%	3%
Total	100%	100%	100%
Age			
Average Age - Males	41 years	41 years	38 years
Average Age - Females	38 years	33 years	34 years
Occupation			
Mgmt., Business, Science & Arts	46%	41%	37%
Service Occupations	11%	14%	17%
Student	12%	16%	13%
Sales and Office	11%	10%	10%
Retired	8%	4%	5%
Homemaker	4%	3%	3%
Prod., Trans., & Material Moving	3%	6%	7%
Military/Government	3%	2%	3%
Nat. Res., Const., & Maintenance	3%	3%	4%
Other	1%	1%	1%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	5%	6%
\$20,000 - \$39,999	15%	34%	37%
\$40,000 - \$59,999	15%	26%	31%
\$60,000 - \$79,999	14%	8%	8%
\$80,000 - \$99,999	10%	3%	4%
\$100,000 - \$119,999	10%	9%	7%
\$120,000 - \$139,999	4%	4%	1%
\$140,000 - \$159,999	4%	3%	1%
\$160,000 - \$179,999	3%	4%	2%
\$180,000 - \$199,999	1%	-	-
\$200,000 and over	10%	5%	3%
Total	100%	100%	100%
Average Annual Income	\$89,309	\$75,035	\$56,673

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