

CHARACTERISTICS OF TRAVELERS FROM SCANDINAVIA TO CALIFORNIA - 2013

The Scandinavian region is defined as the combined countries of Denmark, Finland, Norway and Sweden. Scandinavia is one of California's large overseas markets with approximately 241,000 visitors to California in 2013. Collectively visitors from Scandinavia spent approximately \$444 million in California.

Scandinavian visitors to California during 2013 reported spending \$94 per day during a 19.6 night average stay or approximately \$1,843 per visitor. The average spending for all overseas visitors to California was about \$1,940 (\$159 per day; 12.2 nights in California).

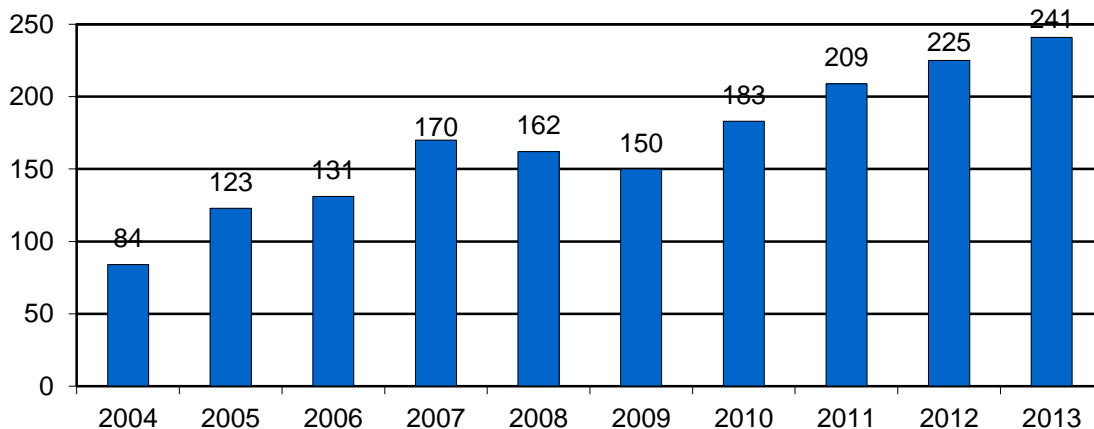
Visitors From Scandinavia

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2003	517,815	25.5%	132,000
2004	614,109	13.6%	84,000
2005	693,279	17.8%	123,000
2006	704,594	18.5%	131,000
2007	824,122	20.7%	170,000
2008	986,052	16.4%	162,000
2009	877,722	17.1%	150,000
2010	979,626	18.7%	183,000
2011	1,083,618	19.3%	209,000
2012	1,101,673	20.5%	225,000
2013	1,158,356	20.0%	241,000

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 Scandinavia to CA, 2004-2013 (in 000s)



Source: U.S. Dept. of Commerce, National Travel and Tourism Office.

During the previous years, the volume of visitors to California from Scandinavia reached its peak in 1999 at 223,000 visitors. Following this peak, the volume decreased to a low of 84,000 visitors in 2004. Since 2004, the volume of visitors has slowly increased to a new high of 241,000 in 2013.

Comparisons with Overseas Visitors

Detailed trip and traveler characteristics of visitors from Scandinavia 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 Scandinavia are more likely to:

- Use information from an online travel agency to plan their trip
- Have longer trip planning and advance airline booking horizons
- Book their air travel with an internet booking service
- Select an airline based on non-stop flights
- Participate in many leisure activities, including: visiting small towns/countryside, historical locations, and going on guided tours
- Use a private or company auto for transportation in the U.S.
- Pay for trip expenses with cash advances/withdrawal using a credit card
- Report they are a student

Conversely, visitors from Scandinavia are less likely to:

- Plan or book their trip with help from a travel agency office
- Spend their travel dollars in the U.S.
- Spend money per visitor per day in California
- Pay for trip expenses with cash from home/travelers checks

Characteristics of Travelers from Scandinavia to California, 2013

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Scandinavia (n = 255)	Leisure Visitors from Scandinavia (n = 163)
Primary Purpose of Trip			
Vacation/Holidays	52%	47%	67%
Visit Friends/Relatives	17%	23%	33%
Business	15%	12%	-
Convention/Conference	9%	8%	-
Other Purpose	8%	10%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	64%	65%	82%
Visit Friends/Relatives	32%	42%	51%
Business	20%	13%	1%
Convention/Conference	12%	11%	2%
Sources Used to Plan Trip**			
Airline	43%	43%	39%
Online Travel Agency	31%	41%	46%
Travel Agency Office	26%	19%	16%
Personal Recommendation	26%	24%	28%
Travel Guide	15%	12%	15%
Corporate Travel Department	14%	9%	3%
Tour Operator/Travel Club	9%	4%	4%
National/State/City Travel Office	8%	6%	8%
Advance Planning for Trip			
7 days or less	5%	3%	4%
8 - 30 days	27%	21%	15%
31 - 60 days	17%	17%	16%
61 - 90 days	14%	18%	20%
More than 3 Months	36%	41%	45%
Total	100%	100%	100%
Average Planning Time in Days	105 days	113 days	126 days
Advance Airline Reservations			
7 days or less	10%	3%	3%
8 - 30 days	35%	29%	21%
31 - 60 days	17%	19%	21%
61 - 90 days	13%	21%	24%
91 - 120 days	8%	8%	6%
121 - 180 days	9%	13%	16%
6 Months or More	7%	8%	9%
Total	100%	100%	100%
Average Booking in Days	72 days	85 days	95 days

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

** Multiple response question. The column may sum to more than 100%.

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

**Characteristics of Travelers from Scandinavia to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Scandinavia (n = 255)	Leisure Visitors from Scandinavia (n = 163)
Means of Booking Air Trip**			
Travel Agency Office	31%	23%	22%
Airlines Directly	28%	30%	32%
Internet Booking Service	24%	40%	44%
Corporate Travel Department	15%	7%	1%
Tour Operator/Travel Club	9%	4%	5%
Other	2%	1%	1%
Main Factor in Selecting Airline			
Airfare	29%	26%	31%
Non-Stop Flights	17%	27%	25%
Convenient Schedule	15%	22%	23%
Mileage Bonus/Frequent Flyer Program	9%	6%	5%
Previous Good Experience	9%	6%	6%
Safety Reputation	6%	3%	2%
Loyalty to Carrier	4%	1%	-
Employer policy	3%	<1%	<1%
In-flight Service Reputation	3%	1%	1%
On-time Reputation	2%	2%	3%
Other	4%	5%	5%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	79%	88%	89%
Executive/Business	10%	2%	2%
Premium Economy	10%	9%	9%
First Class	1%	-	-
Total	100%	100%	100%
Use of Package			
Yes	15%	9%	12%
No	85%	91%	88%
Total	100%	100%	100%
Travel Package Includes**			
Airfare and Accommodation Only	3%	2%	1%
Attractions/Events/Entertainment	7%	4%	6%
Bus/Coach	7%	5%	7%
Cruise	2%	1%	2%
Guided Tours	6%	4%	6%
Meals	6%	4%	6%
Recreation	1%	2%	3%
Rental Car	5%	5%	7%
Tour Guide for Entire Trip	4%	5%	7%

* 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 Scandinavia to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Scandinavia (n = 255)	Leisure Visitors from Scandinavia (n = 163)
Travel Companions**			
Traveling Alone	61%	64%	49%
Spouse/Partner	21%	17%	25%
Family/Relatives	13%	13%	20%
Friends	6%	7%	10%
Business Associates	4%	2%	-
Tour Group	1%	<1%	<1%
Average Travel Party Size	1.6	1.5	1.8
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	75%	73%
Private Home	27%	37%	39%
Other	6%	5%	6%
Length of Stay			
Mean Nights in the U.S.	22.5 nights	30.5 nights	19.9 nights
Mean Nights in California	12.2 nights	19.6 nights	12.3 nights
% of California Nights	54%	64%	62%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	25%	31%
Average Trips to the U.S. in Past Year	1.7 trips	1.4 trips	1.2 trips
Average Number of States Visited	2.0 states	1.8 states	2.0 states
Average Number of Destinations Visited	3.0 dest.	3.1 dest.	3.6 dest.
Places Visited in the U.S.**			
Los Angeles	59%	58%	62%
San Francisco	47%	55%	61%
Las Vegas	30%	30%	40%
New York City	16%	13%	15%
San Diego	13%	17%	13%
Anaheim-Santa Ana	8%	6%	5%
Flagstaff-Grand Canyon-Sedona	7%	8%	12%
San Jose	6%	6%	5%
DC Metro Area	4%	2%	4%
Monterey-Salinas	4%	10%	13%
Oahu	4%	1%	1%
Santa Barbara	3%	9%	12%
Riverside/San Bernardino	3%	4%	5%
Chicago	3%	3%	3%
Seattle	3%	2%	3%
Sacramento	3%	1%	1%
Miami	3%	3%	3%

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**Characteristics of Travelers from Scandinavia to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Scandinavia (n = 255)	Leisure Visitors from Scandinavia (n = 163)
Activities Experienced While in the U.S.**			
Shopping	88%	93%	93%
Sightseeing	84%	85%	90%
National Parks/Monuments	49%	58%	63%
Experience Fine Dining	43%	44%	45%
Small Towns/Countryside	41%	57%	62%
Amusement/Theme Parks	38%	37%	38%
Historical Locations	37%	49%	50%
Guided Tours	33%	44%	48%
Art Gallery/Museums	30%	30%	27%
Casino/Gamble	25%	28%	33%
Cultural/Ethnic Heritage Sites	21%	18%	19%
Concert/Play/Musical	20%	21%	20%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	46%	40%	40%
Rented Auto	43%	49%	51%
Auto, Private or Company	37%	45%	46%
City Subway/Tram/Bus	33%	36%	35%
Taxicab/Limousine	33%	37%	32%
Bus between Cities	18%	10%	12%
Ferry/River Taxi/Srt. Scenic Cruise	12%	14%	14%
Railroad between Cities	8%	7%	9%
Rented Bicycle/Motorcycle/Moped	5%	5%	5%
Cruise Ship/River Boat 1+ Nights	4%	5%	5%
Motor Home/Camper	2%	3%	2%
Visitor Spending***			
CA Visitor Spending in the U.S. per Visitor	\$3,577	\$2,179	\$2,026
Per Visitor Per Day Spending in California	\$159	\$94	\$102
Per Visitor Spending in California	\$1,940	\$1,843	\$1,252
Spending by Category (Per Visitor/Trip)			
Accommodations	29.1%	30.1%	26.9%
Air Transportation in the U.S.	6.9%	3.1%	3.0%
Entertainment	12.2%	12.1%	15.0%
Food/Beverages	17.8%	20.1%	24.0%
Gifts/Souvenirs	21.9%	21.6%	21.2%
Ground Transportation in the U.S.	5.6%	4.2%	6.0%
Other	6.3%	8.7%	3.9%

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** Multiple response question. The column may sum 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 Scandinavia to California
(2013 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 6,744)	All Visitors from Scandinavia (n = 255)	Leisure Visitors from Scandinavia (n = 163)
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	45%	42%
Cash from Home/Travelers Checks	26%	11%	14%
Cash Adv./Withdrawal Using Credit Card	18%	30%	32%
Cash Adv./Withdrawal Using Debit Card	7%	6%	5%
Purchases Using Debit Card	6%	9%	7%
Total	100%	100%	100%
Age			
Average Age - Males	42 years	39 years	41 years
Average Age - Females	39 years	38 years	39 years
Occupation			
Mgmt., Business, Science, & Arts	44%	48%	44%
Service Occupations	11%	9%	10%
Student	11%	22%	21%
Sales and Office	10%	4%	6%
Retired	8%	7%	9%
Homemaker	5%	1%	1%
Prod., Trans., & Material Moving	4%	2%	2%
Military/Government	4%	4%	5%
Nat. Res., Const., & Maintenance	3%	<1%	-
Other	2%	3%	2%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	13%	16%
\$20,000 - \$39,999	14%	7%	8%
\$40,000 - \$59,999	14%	4%	3%
\$60,000 - \$79,999	12%	6%	7%
\$80,000 - \$99,999	10%	10%	10%
\$100,000 - \$119,999	8%	12%	7%
\$120,000 - \$139,999	6%	10%	11%
\$140,000 - \$159,999	5%	12%	12%
\$160,000 - \$179,999	3%	5%	4%
\$180,000 - \$199,999	3%	5%	3%
\$200,000 and over	12%	16%	19%
Total	100%	100%	100%
Average Annual Income	\$100,889	\$126,538	\$127,598

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