

## CHARACTERISTICS OF TRAVELERS FROM SCANDINAVIA TO CALIFORNIA - 2014

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 268,000 visitors to California in 2014. Collectively visitors from Scandinavia spent approximately \$479 million in California.

Scandinavian visitors to California during 2014 reported spending \$131 per day during a 13.7 night average stay or approximately \$1,789 per visitor. The average spending for all overseas visitors to California was about \$1,872 (\$153 per day; 12.2 nights in California).

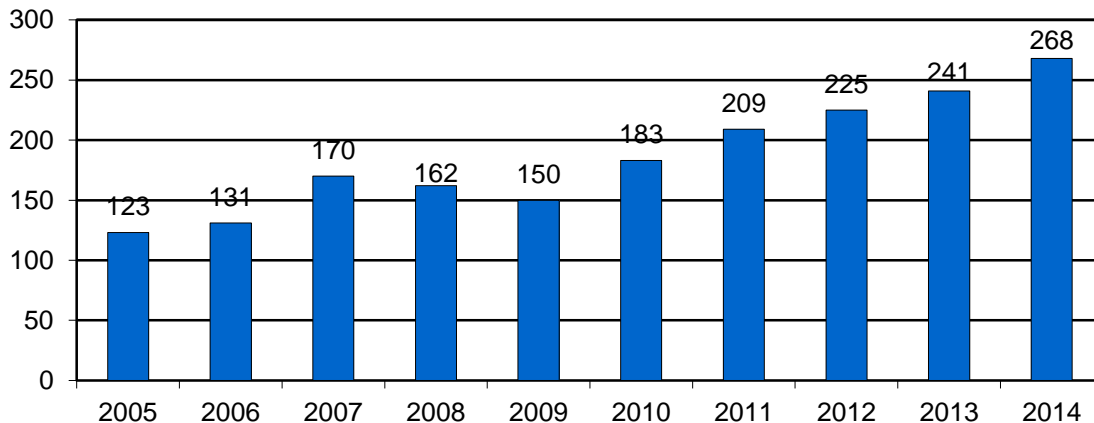
### Visitors From Scandinavia

Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
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	20.8%	241,000
2014	1,297,474	20.1%	268,000

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, 2005-2014 (in 000s)



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

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 268,000 in 2014.

## **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 airfare or non-stop flights
- Stay in a hotel/motel
- Stay a greater proportion of their nights in California
- Visit San Francisco, San Diego, Santa Barbara, or Riverside/San Bernardino
- Participate in leisure activities, including: visiting national parks/monuments, small towns/countryside, and historical locations
- Use a rented auto for transportation in the U.S.
- Pay for trip expenses with purchases using a credit card, or with cash advances/withdrawal using a credit card

Conversely, visitors from Scandinavia are less likely to:

- Plan or book their trip with help from a travel agency office
- Make use of a travel package
- Visit amusement/theme parks while in the U.S.
- Use a bus between cities for transportation in the U.S.
- 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, 2014

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Scandinavia (n = 295)	Leisure Visitors from Scandinavia (n = 192)
<b>Primary Purpose of Trip</b>			
Vacation/Holidays	54%	58%	79%
Visit Friends/Relatives	18%	16%	21%
Business	13%	12%	-
Convention/Conference	8%	10%	-
Other Purpose	7%	5%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Vacation/Holidays	66%	70%	90%
Visit Friends/Relatives	34%	37%	40%
Business	18%	15%	1%
Convention/Conference	12%	17%	2%
<b>Sources Used to Plan Trip**</b>			
Airline	43%	46%	49%
Online Travel Agency	32%	49%	48%
Travel Agency Office	25%	15%	15%
Personal Recommendation	29%	28%	35%
Travel Guide	15%	13%	17%
Corporate Travel Department	12%	11%	7%
Tour Operator/Travel Club	10%	2%	2%
National/State/City Travel Office	8%	6%	5%
<b>Advance Planning for Trip</b>			
7 days or less	5%	4%	2%
8 - 30 days	25%	16%	10%
31 - 60 days	19%	17%	18%
61 - 90 days	15%	14%	15%
More than 3 Months	36%	49%	55%
Total	100%	100%	100%
Average Planning Time in Days	106 days	121 days	140 days
<b>Advance Airline Reservations</b>			
7 days or less	9%	6%	2%
8 - 30 days	35%	27%	25%
31 - 60 days	19%	19%	16%
61 - 90 days	12%	14%	18%
91 - 120 days	8%	13%	12%
121 - 180 days	10%	14%	18%
6 Months or More	8%	7%	10%
Total	100%	100%	100%
Average Booking in Days	74 days	82 days	94 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  
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Scandinavia (n = 295)	Leisure Visitors from Scandinavia (n = 192)
<b>Means of Booking Air Trip**</b>			
Travel Agency Office	29%	18%	17%
Airlines Directly	29%	33%	35%
Internet Booking Service	27%	42%	45%
Corporate Travel Department	12%	9%	3%
Tour Operator/Travel Club	10%	4%	5%
Other	1%	2%	1%
<b>Main Factor in Selecting Airline</b>			
Airfare	31%	42%	42%
Non-Stop Flights	19%	28%	29%
Convenient Schedule	14%	9%	9%
Mileage Bonus/Frequent Flyer Program	8%	3%	1%
Previous Good Experience	6%	7%	7%
Safety Reputation	6%	1%	2%
Loyalty to Carrier	3%	1%	1%
Employer policy	3%	1%	-
In-flight Service Reputation	2%	1%	-
On-time Reputation	2%	4%	4%
Other	5%	5%	5%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	83%	85%	90%
Executive/Business	9%	4%	3%
Premium Economy	8%	11%	7%
First Class	1%	-	-
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	15%	9%	9%
No	85%	91%	91%
Total	100%	100%	100%
<b>Travel Package Includes**</b>			
Airfare and Accommodation Only	7%	4%	5%
Attractions/Events/Entertainment	6%	1%	1%
Bus/Coach	6%	1%	1%
Cruise	6%	-	-
Guided Tours	5%	1%	2%
Meals	4%	2%	<1%
Recreation	2%	-	-
Rental Car	2%	3%	4%
Tour Guide for Entire Trip	2%	<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 Scandinavia to California  
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Scandinavia (n = 295)	Leisure Visitors from Scandinavia (n = 192)
<b>Travel Companions**</b>			
Traveling Alone	59%	58%	42%
Spouse/Partner	22%	20%	28%
Family/Relatives	15%	13%	19%
Friends	6%	11%	17%
Business Associates	3%	2%	-
Tour Group	1%	-	-
<b>Average Travel Party Size</b>	1.7	1.7	2.0
<b>Median Travel Party Size</b>	1.0	1.0	2.0
<b>Type of Lodging**</b>			
Hotel / Motel	76%	82%	80%
Private Home	30%	29%	31%
Other	6%	14%	16%
<b>Length of Stay</b>			
Mean Nights in the U.S.	23.4 nights	20.6 nights	18.4 nights
Mean Nights in California	12.2 nights	13.6 nights	12.1 nights
% of California Nights	52%	66%	66%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	27%	23%	27%
Average Trips to the U.S. in Past Year	1.7 trips	1.5 trips	1.3 trips
<b>Average Number of States Visited</b>	2.1 states	2.0 states	2.2 states
<b>Average Number of Destinations Visited</b>	3.1 dest.	3.6 dest.	4.2 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	62%	64%	77%
San Francisco	44%	59%	62%
Las Vegas	29%	35%	46%
New York City	16%	20%	26%
San Diego	14%	22%	20%
Anaheim-Santa Ana	8%	6%	7%
Flagstaff-Grand Canyon-Sedona	7%	7%	9%
San Jose	6%	6%	2%
DC Metro Area	5%	1%	1%
Monterey-Salinas	4%	8%	10%
Oahu	4%	5%	6%
Santa Barbara	4%	13%	11%
Riverside/San Bernardino	3%	12%	12%
Chicago	3%	2%	3%
Seattle	3%	2%	2%
Sacramento	3%	2%	3%
Miami	3%	2%	<1%

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**Characteristics of Travelers from Scandinavia to California  
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from Scandinavia (n = 295)	Leisure Visitors from Scandinavia (n = 192)
<b>Activities Experienced While in the U.S.**</b>			
Shopping	89%	90%	96%
Sightseeing	83%	81%	87%
National Parks/Monuments	52%	61%	73%
Experience Fine Dining	44%	46%	48%
Small Towns/Countryside	43%	65%	74%
Amusement/Theme Parks	40%	32%	39%
Historical Locations	35%	47%	53%
Guided Tours	33%	34%	41%
Art Gallery/Museums	31%	26%	28%
Casino/Gamble	24%	27%	37%
Cultural/Ethnic Heritage Sites	21%	15%	16%
Concert/Play/Musical	20%	26%	29%
<b>Transportation While in the U.S.**</b>			
Air Travel between U.S. Cities	45%	47%	45%
Rented Auto	44%	65%	76%
Auto, Private or Company	38%	33%	27%
City Subway/Tram/Bus	31%	34%	34%
Taxicab/Limousine	31%	37%	31%
Bus between Cities	19%	8%	8%
Ferry/River Taxi/Srt. Scenic Cruise	10%	8%	9%
Railroad between Cities	7%	3%	3%
Rented Bicycle/Motorcycle/Moped	5%	2%	2%
Cruise Ship/River Boat 1+ Nights	4%	1%	-
Motor Home/Camper	2%	3%	1%
<b>Visitor Spending***</b>			
CA Visitor Spending in the U.S. per Visitor	\$3,590	\$2,114	\$3,327
Per Visitor Per Day Spending in California	\$153	\$131	\$162
Per Visitor Spending in California	\$1,872	\$1,789	\$2,197
<b>Spending by Category (Per Visitor/Trip)</b>			
Accommodations	30.4%	34.9%	32.9%
Air Transportation in the U.S.	6.6%	6.4%	5.0%
Entertainment	12.5%	7.7%	10.2%
Food/Beverages	18.1%	20.7%	21.6%
Gifts/Souvenirs	21.1%	17.9%	19.4%
Ground Transportation in the U.S.	6.2%	4.4%	4.1%
Other	4.9%	8.0%	6.8%

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\*\*\* 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  
(2014 - cont.)**

<b>Trip &amp; Traveler Characteristics</b>	<b>All Overseas Visitors* (n = 8,032)</b>	<b>All Visitors from Scandinavia (n = 295)</b>	<b>Leisure Visitors from Scandinavia (n = 192)</b>
<b>Payment Method for Trip Expenses</b>			
Purchases Using Credit Card	44%	53%	45%
Cash from Home/Travelers Checks	27%	9%	12%
Cash Adv./Withdrawal Using Credit Card	18%	26%	27%
Cash Adv./Withdrawal Using Debit Card	6%	7%	8%
Purchases Using Debit Card	6%	5%	8%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	40 years	38 years	39 years
Average Age - Females	38 years	37 years	36 years
<b>Occupation</b>			
Mgmt., Business, Science & Arts	44%	48%	39%
Service Occupations	11%	9%	8%
Student	11%	14%	16%
Sales and Office	11%	10%	11%
Retired	8%	6%	9%
Homemaker	4%	1%	1%
Prod., Trans., & Material Moving	4%	5%	6%
Military/Government	3%	2%	3%
Nat. Res., Const., & Maintenance	2%	5%	7%
Other	2%	1%	<1%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	15%	9%	10%
\$20,000 - \$39,999	13%	8%	11%
\$40,000 - \$59,999	14%	12%	14%
\$60,000 - \$79,999	11%	14%	15%
\$80,000 - \$99,999	10%	12%	8%
\$100,000 - \$119,999	9%	12%	9%
\$120,000 - \$139,999	6%	5%	6%
\$140,000 - \$159,999	4%	6%	9%
\$160,000 - \$179,999	3%	4%	5%
\$180,000 - \$199,999	2%	2%	2%
\$200,000 and over	11%	17%	13%
Total	100%	100%	100%
Average Annual Income	\$95,782	\$110,371	\$102,193

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