

## CHARACTERISTICS OF TRAVELERS FROM SCANDINAVIA TO CALIFORNIA - 2015

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 276,000 visitors to California in 2015. Collectively visitors from Scandinavia spent approximately \$558 million in California.

Scandinavian visitors to California during 2015 reported spending \$145 per day during a 13.9 night average stay or approximately \$2,019 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 Scandinavia

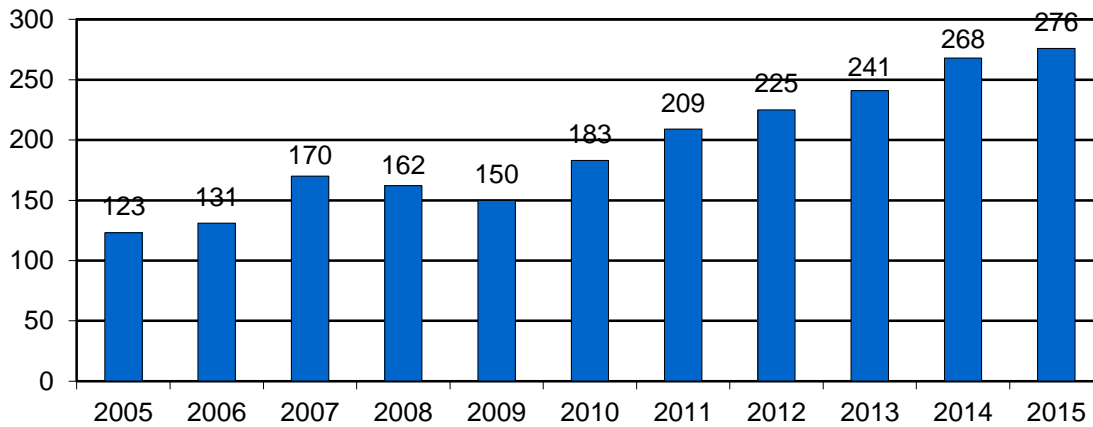
Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
2005	693,279	17.8%	123,000
2006	704,594	18.5%	131,000
2007	824,122	20.7%	170,000
2008	986,052	16.4%	162,000
2009	877,722	17.1%	150,000
2010	979,626	18.7%	183,000
2011	1,083,618	19.3%	209,000
2012	1,101,673	20.5%	225,000
2013	1,158,356	20.8%	241,000
2014 <sup>3</sup>	1,297,474	20.7%	268,000
2015 <sup>3</sup>	1,299,523	21.3%	276,000

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 Scandinavia 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).

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 increased to a new high of 276,000 in 2015.

## **Comparisons with Overseas Visitors**

Detailed trip and traveler characteristics of visitors from Scandinavia are provided in the table on the following pages. 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:

- Travel to the U.S. for vacation/holiday purposes
- 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 convenient schedule
- Stay a greater proportion of their nights in California
- Spend a higher percentage of their travel dollar on food/beverages
- Visit small towns/countryside as a leisure activity
- Use a rented auto for transportation in the U.S.

Conversely, visitors from Scandinavia are less likely to:

- Book their trip with help from a travel agency office
- Experience fine dining or visit cultural/ethnic heritage sites while in the U.S.
- Use a bus or travel by air 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, 2015

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Scandinavia (n = 347)	Leisure Visitors from Scandinavia (n = 230)
<b>Primary Purpose of Trip</b>			
Vacation/Holidays	54%	63%	77%
Visit Friends/Relatives	18%	19%	23%
Business	13%	5%	-
Convention/Conference	9%	8%	-
Other Purpose	6%	6%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Vacation/Holidays	67%	80%	86%
Visit Friends/Relatives	34%	36%	31%
Business	17%	5%	1%
Convention/Conference	12%	11%	1%
<b>Sources Used to Plan Trip**</b>			
Airline	43%	50%	44%
Online Travel Agency	34%	53%	58%
Personal Recommendation	29%	22%	21%
Travel Agency Office	23%	14%	17%
Travel Guide	15%	16%	20%
Corporate Travel Department	12%	10%	7%
Tour Operator/Travel Club	9%	6%	7%
National/State/City Travel Office	7%	6%	5%
<b>Advance Planning for Trip</b>			
7 days or less	5%	4%	4%
8 - 30 days	24%	16%	15%
31 - 60 days	19%	13%	6%
61 - 90 days	15%	18%	21%
More than 3 Months	38%	49%	54%
Total	100%	100%	100%
Average Planning Time in Days	108 days	121 days	days
<b>Advance Airline Reservations</b>			
7 days or less	8%	3%	3%
8 - 30 days	33%	21%	18%
31 - 60 days	20%	20%	16%
61 - 90 days	13%	19%	18%
91 - 120 days	9%	12%	13%
121 - 180 days	10%	13%	17%
6 Months or More	8%	12%	16%
Total	100%	100%	100%
Average Booking in Days	76 days	96 days	109 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  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Scandinavia (n = 347)	Leisure Visitors from Scandinavia (n = 230)
<b>Means of Booking Air Trip**</b>			
Airlines Directly	31%	35%	30%
Internet Booking Service	29%	48%	51%
Travel Agency Office	26%	14%	17%
Corporate Travel Department	12%	6%	1%
Tour Operator/Travel Club	9%	2%	3%
Other	1%	<1%	<1%
<b>Main Factor in Selecting Airline</b>			
Airfare	29%	34%	35%
Non-Stop Flights	17%	18%	19%
Convenient Schedule	15%	25%	24%
Previous Good Experience	9%	13%	11%
Mileage Bonus/Frequent Flyer Program	8%	2%	2%
Safety Reputation	9%	2%	2%
Loyalty to Carrier	3%	1%	1%
In-flight Service Reputation	3%	-	-
Employer policy	3%	1%	-
On-time Reputation	2%	1%	1%
Other	3%	3%	4%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	82%	93%	92%
Premium Economy	10%	5%	6%
Executive/Business	8%	3%	2%
First Class	1%	-	-
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	14%	6%	8%
No	86%	94%	92%
Total	100%	100%	100%
<b>Travel Package Includes**</b>			
Attractions/Events/Entertainment	6%	2%	3%
Meals	6%	1%	2%
Bus/Coach	6%	<1%	1%
Guided Tours	6%	<1%	1%
Rental Car	4%	2%	3%
Tour Guide for Entire Trip	5%	<1%	1%
Airfare and Accommodation Only	3%	2%	3%
Cruise	2%	<1%	<1%
Recreation	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  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Scandinavia (n = 347)	Leisure Visitors from Scandinavia (n = 230)
<b>Travel Companions**</b>			
Traveling Alone	59%	55%	44%
Spouse/Partner	22%	16%	20%
Family/Relatives	15%	20%	26%
Friends	6%	12%	15%
Business Associates	4%	2%	1%
Tour Group	1%	<1%	<1%
<b>Average Travel Party Size</b>	1.7	1.8	2.0
<b>Median Travel Party Size</b>	1.0	1.0	2.0
<b>Type of Lodging**</b>			
Hotel / Motel	73%	67%	71%
Private Home	32%	38%	37%
Other	6%	7%	5%
<b>Length of Stay</b>			
Mean Nights in the U.S.	22.6 nights	22.7 nights	16.6 nights
Mean Nights in California	12.6 nights	13.9 nights	9.5 nights
% of California Nights	52%	61%	57%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	28%	18%	20%
Average Trips to the U.S. in Past Year	1.7 trips	1.6 trips	1.5 trips
<b>Average Number of States Visited</b>	2.0 states	2.0 states	2.1 states
<b>Average Number of Destinations Visited</b>	3.1 dest.	3.2 dest.	3.3 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	60%	58%	62%
San Francisco	45%	45%	50%
Las Vegas	30%	33%	33%
New York City	15%	14%	18%
San Diego	14%	16%	17%
Anaheim-Santa Ana	8%	7%	6%
Flagstaff-Grand Canyon-Sedona	7%	8%	9%
San Jose	6%	3%	2%
DC Metro Area	5%	3%	2%
Monterey-Salinas	5%	8%	10%
Santa Barbara	4%	8%	8%
Riverside/San Bernardino	4%	7%	8%
Oahu	3%	3%	4%
Seattle	3%	3%	3%
Chicago	3%	3%	4%
Miami	2%	4%	4%
Sacramento	2%	2%	2%

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**Characteristics of Travelers from Scandinavia to California  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Scandinavia (n = 347)	Leisure Visitors from Scandinavia (n = 230)
<b>Activities Experienced While in the U.S.**</b>			
Shopping	87%	94%	94%
Sightseeing	83%	88%	89%
National Parks/Monuments	51%	51%	53%
Small Towns/Countryside	42%	51%	52%
Experience Fine Dining	40%	31%	29%
Amusement/Theme Parks	39%	32%	34%
Historical Locations	34%	37%	38%
Guided Tours	31%	31%	38%
Art Gallery/Museums	33%	27%	30%
Casino/Gamble	24%	23%	21%
Cultural/Ethnic Heritage Sites	20%	11%	13%
Concert/Play/Musical	20%	18%	16%
<b>Transportation While in the U.S.**</b>			
Rented Auto	44%	57%	59%
Air Travel between U.S. Cities	44%	36%	36%
Auto, Private or Company	37%	39%	36%
City Subway/Tram/Bus	31%	30%	27%
Taxicab/Limousine	31%	37%	32%
Bus between Cities	19%	10%	10%
Ferry/River Taxi/Srt. Scenic Cruise	10%	6%	8%
Railroad between Cities	7%	5%	4%
Rented Bicycle/Motorcycle/Moped	5%	6%	7%
Cruise Ship/River Boat 1+ Nights	4%	3%	3%
Motor Home/Camper	2%	1%	2%
<b>Visitor Spending***</b>			
CA Visitor Spending in the U.S. per Visitor	\$3,401	\$2,387	\$2,289
Per Visitor Per Day (CA)	\$157	\$145	\$138
Per Visitor/Trip (California)	\$1,979	\$2,019	\$1,310
<b>Spending by Category (Per Visitor/Trip)</b>			
Accommodations	31.5%	34.1%	29.3%
Air Transportation in the U.S.	5.9%	3.7%	4.3%
Entertainment	12.9%	9.6%	11.9%
Food/Beverages	19.9%	23.8%	26.3%
Gifts/Souvenirs	19.2%	19.9%	18.9%
Ground Transportation in the U.S.	6.3%	4.5%	4.0%
Other	4.2%	4.5%	5.3%

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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  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from Scandinavia (n = 347)	Leisure Visitors from Scandinavia (n = 230)
<b>Payment Method for Trip Expenses</b>			
Purchases Using Credit Card	43%	50%	47%
Cash from Home/Travelers Checks	27%	10%	11%
Cash Adv./Withdrawal Using Credit Card	18%	28%	30%
Cash Adv./Withdrawal Using Debit Card	6%	5%	4%
Purchases Using Debit Card	6%	7%	8%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	41 years	42 years	44 years
Average Age - Females	38 years	37 years	41 years
<b>Occupation</b>			
Mgmt., Business, Science & Arts	46%	49%	49%
Service Occupations	11%	10%	11%
Student	12%	12%	8%
Sales and Office	11%	9%	10%
Retired	8%	6%	7%
Homemaker	4%	-	<1%
Prod., Trans., & Material Moving	3%	3%	3%
Military/Government	3%	5%	6%
Nat. Res., Const., & Maintenance	3%	4%	4%
Other	1%	2%	2%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	15%	14%	12%
\$20,000 - \$39,999	15%	3%	3%
\$40,000 - \$59,999	15%	13%	15%
\$60,000 - \$79,999	14%	16%	18%
\$80,000 - \$99,999	10%	10%	12%
\$100,000 - \$119,999	10%	24%	23%
\$120,000 - \$139,999	4%	9%	9%
\$140,000 - \$159,999	4%	3%	4%
\$160,000 - \$179,999	3%	1%	1%
\$180,000 - \$199,999	1%	1%	1%
\$200,000 and over	10%	7%	4%
Total	100%	100%	100%
Average Annual Income	\$89,309	\$91,259	\$85,417

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

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