

CHARACTERISTICS OF TRAVELERS FROM SCANDINAVIA TO CALIFORNIA - 2009

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 146,000 visitors to California in 2009. Collectively visitors from Scandinavia spent approximately \$276 million in California.

Scandinavian visitors to California during 2009 reported spending \$108 per day during a 17.5 night average stay or approximately \$1,890 per visitor. The average spending for all overseas visitors to California was about \$1,205 (\$103 per day; 11.7 nights in California).

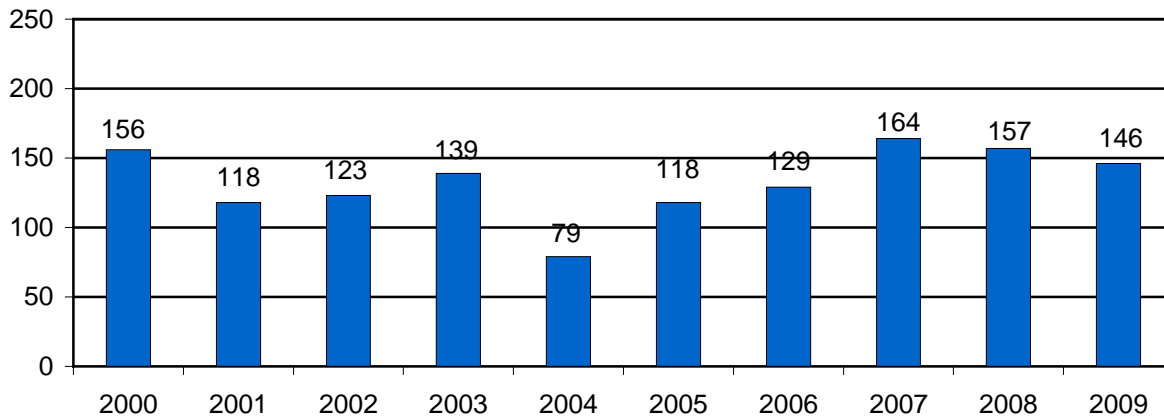
Visitors From Scandinavia

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1999	696,960	32.0%	223,000
2000	712,281	21.9%	156,000
2001	553,015	21.3%	118,000
2002	500,325	24.6%	123,000
2003	517,815	26.8%	139,000
2004	614,109	12.9%	79,000
2005	693,279	17.0%	118,000
2006	704,594	18.3%	129,000
2007	824,122	19.9%	164,000
2008	986,052	15.9%	157,000
2009	877,722	16.6%	146,000

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 Scandinavia to CA, 2000-2009 (in 000s)



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

During the past 10 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 79,000 visitors in 2004. Since 2004, the volume of visitors has slowly increased to a high of 164,000 in 2007 and then dropped to 146,000 in 2009.

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:

- Have longer trip planning and advance airline booking horizons
- Select an airline due to schedule
- Travel in economy/tourist/coach class
- Visit New York City as part of their U.S. trip
- Visit historical places and tour the countryside
- Spend more per visitor per trip in California as well as the U.S.
- Pay with credit cards for trip expenses
- Have a higher average annual household income

Conversely, visitors from Scandinavia are less likely to:

- Travel in executive/business class
- Travel with a spouse
- Pay with cash for travel expenses
- Work in a managerial/executive position

Characteristics of Travelers from Scandinavia to California, 2009

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Scandinavia (n = 273)	Leisure Visitors from Scandinavia (n = 161)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	47%	42%	67%
Business/Professional	22%	23%	-
Visit Friends/Relatives	21%	20%	33%
Convention/Conference	6%	7%	-
Other Purpose	5%	8%	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	65%	68%	86%
Visit Friends/Relatives	37%	43%	54%
Business/Professional	26%	24%	2%
Convention/Conference	8%	10%	1%
Sources Used to Plan Trip**			
Airlines Directly	23%	14%	14%
Corporate Travel Department	8%	8%	2%
Personal Computer	43%	47%	54%
Friends/Relatives	18%	13%	19%
Newspapers/Magazines	3%	3%	6%
State/City Travel Office	4%	1%	1%
Tour Company	7%	2%	3%
Travel Agency	40%	46%	43%
Travel Guides	10%	5%	7%
Advance Planning for Trip			
7 days or less	7%	8%	10%
8 - 30 days	28%	21%	12%
31 - 60 days	19%	17%	15%
61 - 90 days	12%	12%	12%
More than 3 Months	34%	43%	51%
Total	100%	100%	100%
Average Planning Time in Days	100 days	114 days	130 days
Advance Airline Reservations			
7 days or less	13%	12%	11%
8 - 30 days	38%	27%	19%
31 - 60 days	16%	22%	19%
61 - 90 days	10%	12%	16%
91 - 120 days	6%	7%	9%
121 - 180 days	10%	11%	12%
6 Months or More	7%	9%	14%
Total	100%	100%	100%
Average Booking in Days	67 days	75 days	93 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 Scandinavia to California
(2009 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Scandinavia (n = 273)	Leisure Visitors from Scandinavia (n = 161)
Means of Booking Air Trip			
Airlines Directly	13%	8%	10%
Corporate Travel Department	9%	6%	-
Personal Computer	25%	34%	40%
Travel Agent	46%	47%	47%
Travel Club	1%	-	-
Tour Operator	5%	1%	1%
Other/Don't Know	2%	4%	2%
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	32%	38%	48%
Schedule	13%	24%	13%
Non-Stop Flight	12%	18%	17%
Mileage Bonus/Frequent Flyer Program	10%	6%	4%
Previous Good Experience	9%	6%	7%
Safety Reputation	6%	1%	-
Airline Loyalty	4%	-	-
In-flight Service	5%	4%	7%
Employer policy	3%	-	-
Other	6%	3%	4%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	81%	91%	92%
Executive/Business	17%	8%	6%
First Class	2%	1%	2%
Total	100%	100%	100%
Use of Package			
Yes	14%	9%	13%
No	86%	92%	87%
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	-	1%
8 - 30 days	24%	5%	6%
31 - 60 days	13%	-	-
61 - 90 days	13%	22%	-
91 - 120 days	8%	-	-
121 - 180 days	18%	49%	62%
6 Months or More	20%	24%	31%
Total	100%	100%	100%

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

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Scandinavia (n = 273)	Leisure Visitors from Scandinavia (n = 161)
Travel Companions**			
Business Associates	8%	9%	1%
Family/Relatives	25%	34%	50%
Friends	11%	16%	21%
Spouse	28%	16%	18%
Tour Group	2%	2%	1%
Traveling Alone	38%	32%	19%
Average Travel Party Size	1.6	1.7	2.0
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	76%	83%	75%
Private Home	30%	32%	40%
Other	4%	3%	4%
Length of Stay			
Mean Nights in the U.S.	22.4 nights	26.2 nights	21.2 nights
Mean Nights in California	11.7 nights	17.5 nights	12.4 nights
% of California Nights	52%	67%	58%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	28%	30%	35%
Average Trips to the U.S. in Past Year	1.7 trips	1.7 trips	1.4 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	4.0 trips	2.9 trips
Average Number of States Visited	2.1 states	2.2 states	2.4 states
Average Number of Destinations Visited	3.0 dest.	3.1 dest.	3.5 dest.
Places Visited in the U.S.**			
Los Angeles	55%	51%	58%
San Francisco	48%	51%	52%
Las Vegas	30%	26%	35%
New York City	18%	30%	34%
San Diego	13%	18%	16%
Anaheim-Santa Ana	7%	2%	3%
Grand Canyon	7%	7%	11%
San Jose	6%	4%	2%
Yosemite	4%	5%	8%
Chicago	4%	3%	4%
DC Metro Area	4%	5%	4%
Monterey-Salinas	4%	5%	7%
Riverside/San Bernardino	4%	2%	4%
Seattle	3%	4%	3%
Sacramento	3%	3%	5%
Santa Barbara	3%	5%	5%
Oakland	2%	5%	3%

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**Characteristics of Travelers from Scandinavia to California
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Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from Scandinavia (n = 273)	Leisure Visitors from Scandinavia (n = 161)
Activities Experienced While in the U.S.**			
Shopping	87%	95%	96%
Dining Out	86%	90%	91%
Sightseeing in Cities	56%	61%	62%
Historical Places	45%	58%	67%
National Parks	39%	47%	59%
Amusement/Theme Parks	39%	36%	46%
Visiting Small Towns	38%	44%	51%
Cultural Heritage Sites	32%	33%	41%
Touring Countryside	31%	41%	43%
Casinos/Gambling	27%	27%	27%
Art Gallery/Museum	26%	32%	38%
Guided Tours	24%	29%	37%
Transportation While in the U.S.**			
Airlines in U.S.	39%	31%	37%
Taxi/Limousine	39%	44%	39%
Rented Auto	38%	39%	44%
Company or Private Auto	29%	27%	25%
City Subway/Tram/Bus	26%	28%	33%
Railroad between Cities	11%	15%	12%
Bus between Cities	10%	9%	13%
Motor Home/Camper	2%	-	-
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,584	\$4,750	\$3,982
Per Visitor/Trip (U.S.)	\$2,308	\$2,816	\$2,020
Per Visitor Per Day	\$103	\$108	\$95
Per Visitor/Trip (California)	\$1,205	\$1,890	\$1,178
Spending by Category (Per Visitor/Trip)			
Lodging	\$660	\$822	\$527
Food/Beverages	\$463	\$596	\$468
Gifts/Souvenirs	\$395	\$618	\$401
Transportation in the U.S.	\$348	\$385	\$298
Entertainment	\$234	\$234	\$199
Expenses at the Airport	\$34	\$28	\$19
Other	\$174	\$132	\$108
Total Spending Per Visitor/Trip	\$2,308	\$2,816	\$2,020

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Payment Method for Trip Expenses			
Credit Cards	50%	59%	53%
Cash	41%	30%	31%
Debit Cards	7%	11%	16%
Travelers Checks	2%	-	-
Total	100%	100%	100%
Age			
Average Age - Males	43 years	41 years	44 years
Average Age - Females	39 years	37 years	36 years
Occupation			
Professional/Technical	35%	37%	29%
Manager/Executive	28%	19%	16%
Student	10%	16%	16%
Retired	8%	10%	16%
Clerical/Sales	7%	7%	12%
Other	13%	11%	11%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	9%	5%	4%
\$20,000 - \$39,999	14%	4%	6%
\$40,000 - \$59,999	14%	11%	10%
\$60,000 - \$79,999	13%	15%	21%
\$80,000 - \$99,999	11%	8%	7%
\$100,000 - \$119,999	9%	7%	9%
\$120,000 - \$139,999	6%	6%	4%
\$140,000 - \$159,999	5%	10%	13%
\$160,000 - \$179,999	3%	8%	3%
\$180,000 - \$199,999	3%	7%	9%
\$200,000 and over	12%	20%	14%
Total	100%	100%	100%
Average Annual Income	\$94,800	\$122,100	\$115,000

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