

## CHARACTERISTICS OF TRAVELERS FROM THE NETHERLANDS TO CALIFORNIA - 2009

The Netherlands is a large overseas market that generated approximately 125,000 visitors to California in 2009. Collectively visitors from the Netherlands spent approximately \$146 million in California.

During 2009 visitors to California from the Netherlands reported spending \$122 per day during a 10.9 night average stay or approximately \$1,171 per visitor. The average spending for all overseas visitors to California was about \$1,205 (\$103 per day; 11.7 nights in California).

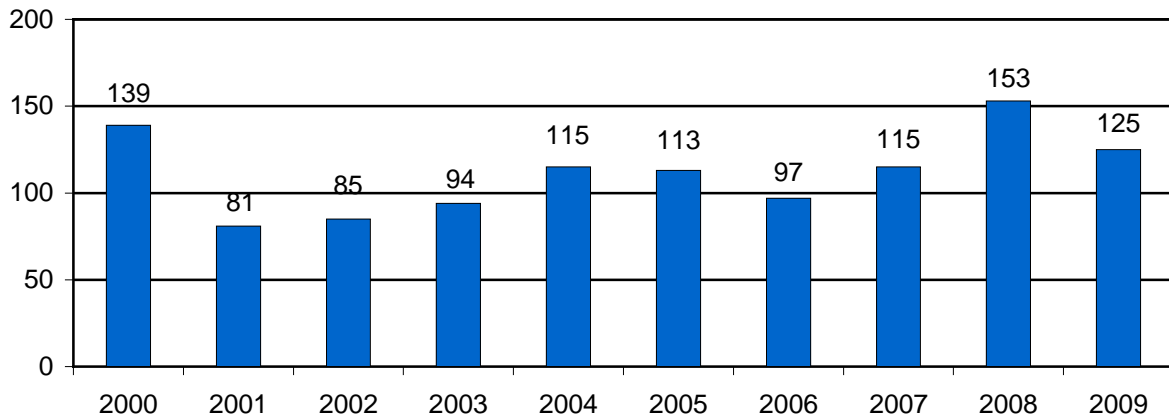
### Visitors From The Netherlands

Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
1999	526,819	29.3%	154,000
2000	553,297	25.1%	139,000
2001	411,742	19.6%	81,000
2002	384,367	22.1%	85,000
2003	373,690	25.2%	94,000
2004	424,872	27.0%	115,000
2005	448,650	25.2%	113,000
2006	446,785	21.7%	97,000
2007	506,852	22.7%	115,000
2008	607,802	25.1%	153,000
2009	547,790	22.8%	125,000

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 the Netherlands to CA, 2000-2009 (in 000s)



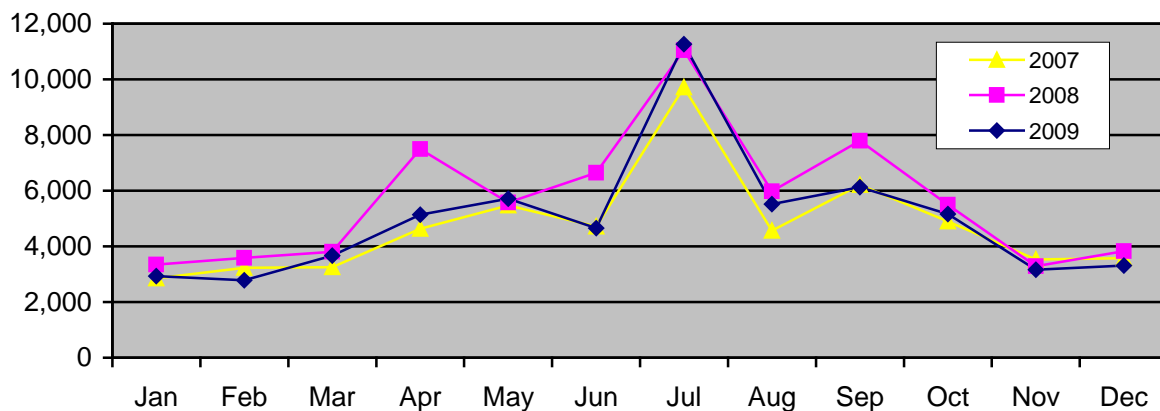
Source: International Trade Administration, Office of Travel and Tourism Industries.

The volume of visitors to California from the Netherlands increased throughout the 1990's reaching a peak of 154,000 visitors in 1999. In 2000 the number of visitors to California from the Netherlands began to decrease to a low of 81,000 in 2001. Since then, California's market share and visitor volumes from the Netherlands have demonstrated some overall recovery with year-to-year variability. In 2009, the volume of visitor to California from the Netherlands was 125,000.

### Arrivals at California Airports from the Netherlands

Monthly volumes of port-of-entry passenger arrivals from the Netherlands to California were higher in some months of 2009 and about the same in others. In general, arrivals of travelers from the Netherlands at California ports-of-entry have peaked in July. The lowest volumes were recorded during the late fall and winter months of January, February, March, November and December.

**Residents of the Netherlands  
Monthly Port of Entry Arrivals to CA  
2007-2009**



U.S. Department of Homeland Security, I-94 Form; CIC Research, Inc.

## Comparisons with Overseas Visitors

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

- Travel to California for leisure/recreation/holiday purposes
- Use a personal computer for trip planning information
- Have longer trip planning and advance airline booking horizons
- Choose an airline based on flight schedule
- Travel in economy/tourist/coach class
- Travel with friends
- Be on their first trip to the U.S.
- Visit San Francisco, Las Vegas, or San Diego as part of their trip
- Experience activities such as dining out, visiting national parks, small towns, cultural heritage sites, touring the countryside, and visiting casinos/gambling
- Use a rented auto for transportation while in the U.S.
- Spend a larger percentage of their travel dollar on lodging
- Have a higher average annual household income

Conversely, visitors from the Netherlands are less likely to:

- Travel executive/business class
- Stay in a private home
- Go shopping while in the U.S.
- Use airlines as well as a taxi/limousine for transportation while in the U.S.

### Characteristics of Travelers from the Netherlands to California, 2009

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,255)	All Visitors from the Netherlands (n = 160)	Leisure Visitors from the Netherlands (n = 114)
<b>Primary Purpose of Trip</b>			
Leisure/Recreation/Holidays	47%	62%	87%
Business/Professional	22%	13%	-
Visit Friends/Relatives	21%	10%	14%
Convention/Conference	6%	11%	-
Other Purpose	5%	5%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Leisure/Recreation/Holidays	65%	78%	93%
Visit Friends/Relatives	37%	34%	37%
Business/Professional	26%	17%	3%
Convention/Conference	8%	12%	1%
<b>Sources Used to Plan Trip**</b>			
Airlines Directly	23%	16%	15%
Corporate Travel Department	8%	5%	2%
Personal Computer	43%	59%	62%
Friends/Relatives	18%	17%	21%
Newspapers/Magazines	3%	1%	2%
State/City Travel Office	4%	4%	3%
Tour Company	7%	5%	5%
Travel Agency	40%	41%	42%
Travel Guides	10%	13%	15%
<b>Advance Planning for Trip</b>			
7 days or less	7%	14%	9%
8 - 30 days	28%	8%	5%
31 - 60 days	19%	9%	7%
61 - 90 days	12%	14%	16%
More than 3 Months	34%	56%	64%
Total	100%	100%	100%
Average Planning Time in Days	100 days	126 days	145 days
<b>Advance Airline Reservations</b>			
7 days or less	13%	14%	8%
8 - 30 days	38%	13%	10%
31 - 60 days	16%	16%	17%
61 - 90 days	10%	18%	18%
91 - 120 days	6%	8%	11%
121 - 180 days	10%	18%	25%
6 Months or More	7%	13%	12%
Total	100%	100%	100%
Average Booking in Days	67 days	94 days	107 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 the Netherlands to California  
(2009 - cont.)**

<b>Trip &amp; Traveler Characteristics</b>	<b>All Overseas Visitors* (n = 7,255)</b>	<b>All Visitors from the Netherlands (n = 160)</b>	<b>Leisure Visitors from the Netherlands (n = 114)</b>
<b>Means of Booking Air Trip</b>			
Airlines Directly	13%	14%	16%
Corporate Travel Department	9%	10%	3%
Personal Computer	25%	29%	30%
Travel Agent	46%	40%	42%
Travel Club	1%	1%	1%
Tour Operator	5%	5%	6%
Other/Don't Know	2%	2%	1%
Total	100%	100%	100%
<b>Main Factor in Selecting Airline</b>			
Airfare	32%	34%	36%
Schedule	13%	36%	33%
Non-Stop Flight	12%	10%	10%
Mileage Bonus/Frequent Flyer Program	10%	8%	10%
Previous Good Experience	9%	1%	1%
Safety Reputation	6%	2%	2%
Airline Loyalty	4%	1%	-
In-flight Service	5%	1%	1%
Employer policy	3%	-	-
Other	6%	7%	7%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	81%	96%	97%
Executive/Business	17%	4%	3%
First Class	2%	1%	-
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	14%	15%	22%
No	86%	85%	78%
Total	100%	100%	100%
<b>Advance Package Booking</b>			
7 days or less	4%	-	-
8 - 30 days	24%	15%	13%
31 - 60 days	13%	-	-
61 - 90 days	13%	20%	20%
91 - 120 days	8%	19%	20%
121 - 180 days	18%	35%	36%
6 Months or More	20%	46%	12%
Total	100%	100%	100%

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

<b>Trip &amp; Traveler Characteristics</b>	<b>All Overseas Visitors* (n = 7,255)</b>	<b>All Visitors from the Netherlands (n = 160)</b>	<b>Leisure Visitors from the Netherlands (n = 114)</b>
<b>Travel Companions**</b>			
Business Associates	8%	3%	1%
Family/Relatives	25%	27%	34%
Friends	11%	21%	23%
Spouse	28%	29%	38%
Tour Group	2%	-	-
Traveling Alone	38%	35%	22%
<b>Average Travel Party Size</b>	1.6	1.6	1.9
<b>Median Travel Party Size</b>	1.0	1.0	2.0
<b>Type of Lodging**</b>			
Hotel / Motel	76%	83%	79%
Private Home	30%	19%	23%
Other	4%	8%	10v
<b>Length of Stay</b>			
Mean Nights in the U.S.	22.4 nights	23.7 nights	21.8 nights
Mean Nights in California	11.7 nights	10.9 nights	8.6 nights
% of California Nights	52%	46%	39%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	28%	39%	39%
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	4.8 trips	3.5 trips
<b>Average Number of States Visited</b>	2.1 states	2.2 states	2.2 states
<b>Average Number of Destinations Visited</b>	3.0 dest.	3.5 dest.	3.6 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	55%	47%	51%
San Francisco	48%	59%	63%
Las Vegas	30%	41%	47%
New York City	18%	13%	9%
San Diego	13%	25%	21%
Anaheim-Santa Ana	7%	7%	10%
Grand Canyon	7%	10%	9%
San Jose	6%	7%	4%
Yosemite	4%	10%	8%
Chicago	4%	7%	6%
DC Metro Area	4%	3%	4%
Monterey-Salinas	4%	6%	9%
Riverside/San Bernardino	4%	6%	6%
Seattle	3%	1%	1%
Sacramento	3%	2%	2%
Santa Barbara	3%	6%	8%
Oakland	2%	-	-

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<b>Activities Experienced While in the U.S.**</b>			
Shopping	87%	77%	82%
Dining Out	86%	96%	97%
Sightseeing in Cities	56%	62%	64%
Historical Places	45%	54%	62%
National Parks	39%	67%	75%
Amusement/Theme Parks	39%	44%	46%
Visiting Small Towns	38%	67%	67%
Cultural Heritage Sites	32%	47%	54%
Touring Countryside	31%	52%	63%
Casinos/Gambling	27%	37%	41%
Art Gallery/Museum	26%	25%	22%
Guided Tours	24%	24%	25%
<b>Transportation While in the U.S.**</b>			
Airlines in U.S.	39%	22%	18%
Taxi/Limousine	39%	25%	22%
Rented Auto	38%	49%	48%
Company or Private Auto	29%	23%	25%
City Subway/Tram/Bus	26%	22%	25%
Railroad between Cities	11%	18%	15%
Bus between Cities	10%	5%	6%
Motor Home/Camper	2%	9%	12%
<b>Visitor Spending in the U.S.</b>			
Per Travel Party Per Trip (U.S.)	\$3,584	\$4,650	\$2,884
Per Visitor/Trip (U.S.)	\$2,308	\$2,884	\$1,546
Per Visitor Per Day	\$103	\$122	\$71
Per Visitor/Trip (California)	\$1,205	\$1,171	\$610
<b>Spending by Category (Per Visitor/Trip)</b>			
Lodging	\$660	\$1,143	\$506
Food/Beverages	\$463	\$695	\$428
Gifts/Souvenirs	\$395	\$228	\$134
Transportation in the U.S.	\$348	\$364	\$308
Entertainment	\$234	\$219	\$121
Expenses at the Airport	\$34	\$17	\$16
Other	\$174	\$219	\$33
<b>Total Spending Per Visitor/Trip</b>	<b>\$2,308</b>	<b>\$2,884</b>	<b>\$1,546</b>

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<b>Payment Method for Trip Expenses</b>			
Credit Cards	50%	58%	54%
Cash	41%	36%	40%
Debit Cards	7%	6%	6%
Travelers Checks	2%	-	-
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	43 years	42 years	42 years
Average Age - Females	39 years	35 years	36 years
<b>Occupation</b>			
Professional/Technical	35%	31%	31%
Manager/Executive	28%	26%	23%
Student	10%	18%	11%
Retired	8%	5%	6%
Clerical/Sales	7%	3%	4%
Other	13%	17%	26%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	9%	3%	4%
\$20,000 - \$39,999	14%	8%	10%
\$40,000 - \$59,999	14%	19%	21%
\$60,000 - \$79,999	13%	6%	8%
\$80,000 - \$99,999	11%	10%	7%
\$100,000 - \$119,999	9%	10%	11%
\$120,000 - \$139,999	6%	8%	8%
\$140,000 - \$159,999	5%	11%	13%
\$160,000 - \$179,999	3%	5%	-
\$180,000 - \$199,999	3%	1%	1%
\$200,000 and over	12%	19%	17%
Total	100%	100%	100%
Average Annual Income	\$94,800	\$113,800	\$105,900

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