

CHARACTERISTICS OF TRAVELERS FROM THE NETHERLANDS TO CALIFORNIA - 2010

The Netherlands is a large overseas market that generated approximately 119,000 visitors to California in 2010. Collectively visitors from the Netherlands spent approximately \$106 million in California.

During 2010 visitors to California from the Netherlands reported spending \$91 per day during a 9.8 night average stay or approximately \$892 per visitor. The average spending for all overseas visitors to California was about \$1,209 (\$107 per day; 11.3 nights in California).

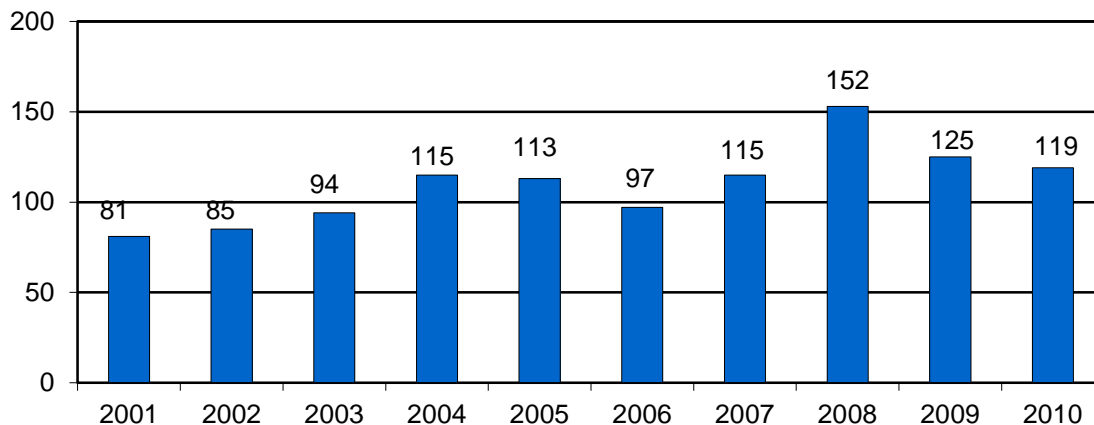
Visitors From The Netherlands

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
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	25.0%	152,000
2009	547,790	22.8%	125,000
2010	570,179	20.9%	119,000

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, 2001-2010 (in 000s)



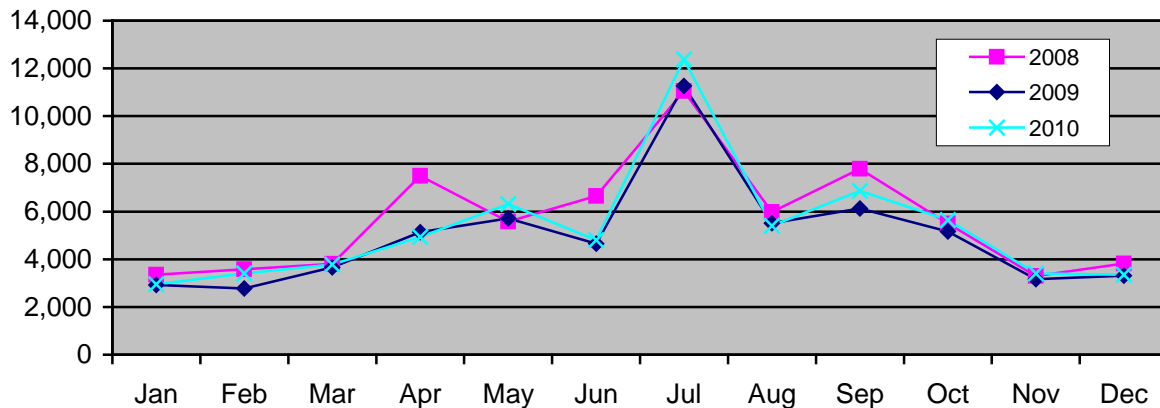
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 2010, the volume of visitors to California from the Netherlands was lower than the previous two years at 119,000.

Arrivals at California Airports from the Netherlands

Monthly volumes of port-of-entry passenger arrivals from the Netherlands to California were about the same in 2010 as in 2009 and 2008. 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
2008-2010**



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
- Use a personal computer when booking their air trip
- Choose an airline based on non-stop flight
- Travel in economy/tourist/coach class
- Be on their first trip to the U.S.
- Visit San Francisco as part of their trip
- Experience activities such as visiting national parks, small towns, and touring the countryside.
- Use a rented auto for transportation while in the U.S.
- Spend less per visitor per trip in the U.S.

Conversely, visitors from the Netherlands are less likely to:

- Travel to California for business/professional purposes
- Travel executive/business class
- Use airlines as well as a taxi/limousine for transportation while in the U.S.
- Spend their travel dollars on gifts/souvenirs

Characteristics of Travelers from the Netherlands to California, 2010

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from the Netherlands (n = 157)	Leisure Visitors from the Netherlands (n = 109)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	48%	67%	79%
Visit Friends/Relatives	22%	17%	21%
Business/Professional	21%	11%	-
Convention/Conference	5%	5%	-
Other Purpose	5%	1%	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	67%	78%	89%
Visit Friends/Relatives	39%	34%	33%
Business/Professional	24%	18%	4%
Convention/Conference	9%	8%	1%
Sources Used to Plan Trip**			
Personal Computer	44%	57%	60%
Travel Agency	40%	34%	36%
Airlines Directly	23%	30%	29%
Friends/Relatives	17%	18%	22%
Travel Guides	10%	11%	14%
Corporate Travel Department	8%	5%	-
Tour Company	5%	3%	4%
State/City Travel Office	4%	3%	3%
Newspapers/Magazines	3%	1%	2%
Advance Planning for Trip			
7 days or less	6%	2%	1%
8 - 30 days	28%	16%	9%
31 - 60 days	20%	13%	11%
61 - 90 days	12%	22%	22%
More than 3 Months	34%	48%	57%
Total	100%	100%	100%
Average Planning Time in Days	98 days	119 days	133 days
Advance Airline Reservations			
7 days or less	12%	3%	1%
8 - 30 days	38%	21%	13%
31 - 60 days	17%	13%	13%
61 - 90 days	10%	24%	25%
91 - 120 days	7%	12%	13%
121 - 180 days	10%	16%	21%
6 Months or More	7%	11%	14%
Total	100%	100%	100%
Average Booking in Days	68 days	100 days	114 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
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from the Netherlands (n = 157)	Leisure Visitors from the Netherlands (n = 109)
Means of Booking Air Trip			
Travel Agent	46%	40%	42%
Personal Computer	26%	37%	41%
Airlines Directly	13%	10%	10%
Corporate Travel Department	8%	6%	-
Tour Operator	4%	5%	6%
Travel Club	1%	-	-
Other/Don't Know	2%	2%	1%
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	29%	36%	39%
Schedule	14%	12%	13%
Non-Stop Flight	14%	26%	20%
Mileage Bonus/Frequent Flyer Program	10%	9%	10%
Previous Good Experience	9%	4%	5%
Safety Reputation	8%	2%	2%
Airline Loyalty	4%	-	-
In-flight Service	4%	2%	3%
Employer policy	3%	1%	-
Other	6%	7%	7%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	84%	98%	99%
Executive/Business	15%	2%	1%
First Class	2%	-	-
Total	100%	100%	100%
Use of Package			
Yes	14%	16%	20%
No	86%	84%	80%
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	-	-
8 - 30 days	27%	15%	15%
31 - 60 days	15%	1%	1%
61 - 90 days	10%	23%	23%
91 - 120 days	11%	15%	15%
121 - 180 days	20%	46%	46%
6 Months or More	14%	-	-
Total	100%	100%	100%

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**Characteristics of Travelers from the Netherlands to California
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from the Netherlands (n = 157)	Leisure Visitors from the Netherlands (n = 109)
Travel Companions**			
Traveling Alone	39%	32%	24%
Spouse	27%	28%	32%
Family/Relatives	25%	30%	36%
Friends	11%	18%	19%
Business Associates	8%	2%	-
Tour Group	2%	-	-
Average Travel Party Size	1.6	1.6	1.8
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	78%	73%	68%
Private Home	29%	28%	33%
Other	4%	11%	15%
Length of Stay			
Mean Nights in the U.S.	22.8 nights	20.6 nights	23.4 nights
Mean Nights in California	11.3 nights	9.8 nights	10.3 nights
% of California Nights	50%	48%	44%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	27%	30%	33%
Average Trips to the U.S. in Past Year	1.8 trips	1.7 trips	1.6 trips
Average Trips to the U.S. in Past 5 Years	5.2 trips	4.9 trips	4.5 trips
Average Number of States Visited	2.1 states	2.0 states	2.2 states
Average Number of Destinations Visited	3.0 dest.	3.4 dest.	3.9 dest.
Places Visited in the U.S.**			
Los Angeles	60%	55%	60%
San Francisco	47%	56%	59%
Las Vegas	29%	35%	44%
New York City	16%	10%	10%
San Diego	14%	13%	15%
Flagstaff	8%	10%	12%
Anaheim-Santa Ana	7%	12%	12%
Grand Canyon	5%	9%	12%
San Jose	5%	6%	5%
DC Metro Area	5%	1%	2%
Yosemite	4%	7%	8%
Chicago	4%	6%	6%
Monterey-Salinas	4%	11%	14%
Miami	4%	1%	1%
Riverside/San Bernardino	4%	2%	3%
Seattle	3%	2%	2%
Sacramento	3%	2%	2%

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**Characteristics of Travelers from the Netherlands to California
(2010 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,760)	All Visitors from the Netherlands (n = 157)	Leisure Visitors from the Netherlands (n = 109)
Activities Experienced While in the U.S.**			
Shopping	88%	91%	94%
Dining Out	85%	89%	90%
Sightseeing in Cities	57%	61%	68%
Historical Places	47%	54%	61%
Amusement/Theme Parks	40%	42%	47%
National Parks	38%	55%	64%
Visiting Small Towns	38%	54%	62%
Cultural Heritage Sites	31%	39%	47%
Touring Countryside	31%	50%	58%
Art Gallery/Museum	26%	33%	35%
Casinos/Gambling	25%	31%	39%
Guided Tours	23%	22%	28%
Transportation While in the U.S.**			
Rented Auto	41%	22%	55%
Taxi/Limousine	39%	25%	27%
Airlines in U.S.	37%	49%	28%
Company or Private Auto	28%	23%	25%
City Subway/Tram/Bus	25%	22%	22%
Railroad between Cities	12%	18%	10%
Bus between Cities	10%	5%	8%
Motor Home/Camper	2%	9%	9%
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,797	\$3,055	\$2,954
Per Visitor/Trip (U.S.)	\$2,435	\$1,868	\$1,651
Per Visitor Per Day	\$107	\$91	\$70
Per Visitor/Trip (California)	\$1,209	\$892	\$721
Spending by Category (Per Visitor/Trip)			
Lodging	\$661	\$645	\$517
Food/Beverages	\$514	\$461	\$444
Gifts/Souvenirs	\$421	\$213	\$178
Transportation in the U.S.	\$384	\$331	\$264
Entertainment	\$243	\$135	\$148
Expenses at the Airport	\$34	\$21	\$21
Other	\$179	\$62	\$79
Total Spending Per Visitor/Trip	\$2,435	\$1,868	\$1,651

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**Characteristics of Travelers from the Netherlands to California
(2010 - cont.)**

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Payment Method for Trip Expenses			
Credit Cards	52%	60%	57%
Cash	39%	30%	31%
Debit Cards	7%	10%	12%
Travelers Checks	1%	-	-
Total	100%	100%	100%
Age			
Average Age - Males	43 years	45 years	45 years
Average Age - Females	40 years	40 years	40 years
Occupation			
Professional/Technical	33%	37%	36%
Manager/Executive	29%	25%	21%
Student	10%	12%	14%
Retired	9%	12%	12%
Clerical/Sales	8%	4%	4%
Other	12%	11%	13%
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	8%	6%	7%
\$20,000 - \$39,999	13%	12%	14%
\$40,000 - \$59,999	14%	17%	20%
\$60,000 - \$79,999	13%	9%	7%
\$80,000 - \$99,999	11%	15%	12%
\$100,000 - \$119,999	11%	12%	13%
\$120,000 - \$139,999	7%	5%	4%
\$140,000 - \$159,999	6%	6%	8%
\$160,000 - \$179,999	3%	2%	1%
\$180,000 - \$199,999	3%	1%	1%
\$200,000 and over	13%	14%	13%
Total	100%	100%	100%
Average Annual Income	\$96,200	\$97,600	\$92,500

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