

CHARACTERISTICS OF TRAVELERS FROM THE NETHERLANDS TO CALIFORNIA - 2008

The Netherlands is a large overseas market that generated approximately 153,000 visitors to California in 2008. Collectively visitors from the Netherlands spent approximately \$207 million in California.

Netherlands visitors to California during 2008 reported spending \$122 per day during an 11.1 night average stay or approximately \$1,354 per visitor. The average spending for all overseas visitors to California was about \$1,353 (\$123 per day; 11.0 nights in California).

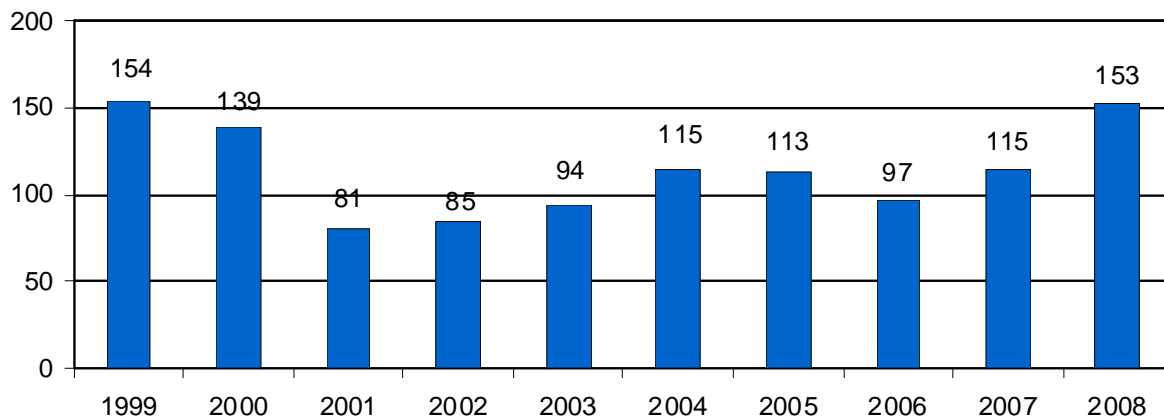
Visitors From the Netherlands

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
1998	490,198	27.4%	134,000
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

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, 1999-2008 (in 000s)



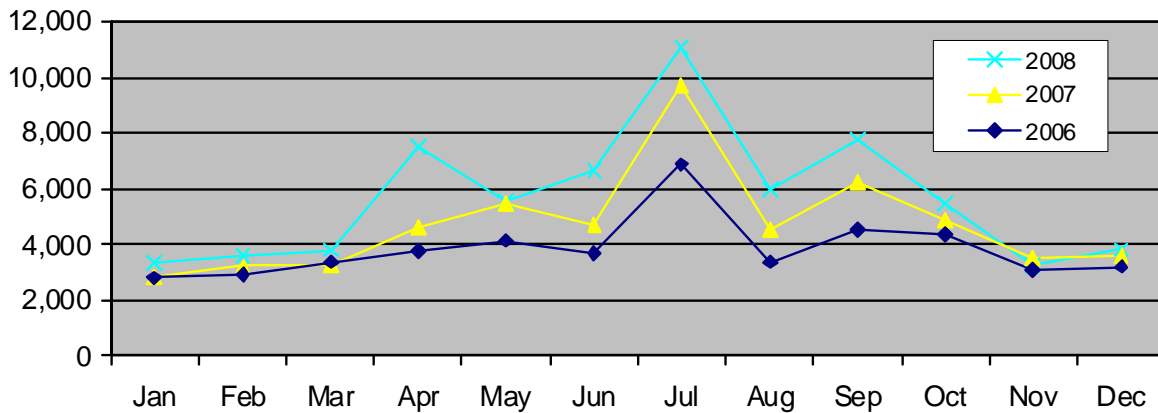
Source: International Trade Administration, Office of Travel and Tourism Industries.

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 some year-to-year variability. In 2008, the volume of visitor to California from the Netherlands had risen to 153,000.

Arrivals of Travelers from the Netherlands at California Airports

Monthly volumes of port-of-entry passenger arrivals from the Netherlands to California were higher in most months of 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
2006-2008**



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 or a travel agency 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 family/relatives
- Visit San Francisco or San Diego as part of their trip
- Experience activities that are more outdoor-oriented, such as visiting historical places, national parks, and the countryside
- Use a rented auto for transportation while in the U.S.
- Use credit cards to pay for trip expenses
- Spend a lower percentage of their travel dollar on gifts/souvenirs

Conversely, visitors from the Netherlands are less likely to:

- Use airlines as a source of trip planning information
- Travel executive/business class
- Travel to California for business purposes
- Go on guided tours
- Use airlines as well as a taxi/limousine for transportation while in the U.S.
- Stay in a private home
- Visit Los Angeles as part of their trip
- Use cash to pay for trip expenses

Characteristics of Travelers from the Netherlands to California – 2008

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from the Netherlands (n = 238)	Leisure Visitors from the Netherlands (n = 140)
Primary Purpose of Trip			
Leisure/Recreation/Holidays	43%	52%	83%
Visit Friends/Relatives	19	11	17
Business/Professional	27	22	-
Convention/Conference	7	11	-
Other Purpose	5	6	-
Total	100%	100%	100%
Purpose of Trip**			
Leisure/Recreation/Holidays	63%	72%	92%
Visit Friends/Relatives	37	35	40
Business/Professional	31	25	1
Convention/Conference	11	12	2
Sources Used to Plan Trip**			
Airlines Directly	21%	10%	8%
Corporate Travel Department	11	5	2
Personal Computer	42	53	56
Friends/Relatives	16	16	18
Newspapers/Magazines	3	1	1
State/City Travel Office	4	3	2
Tour Company	6	5	7
Travel Agency	43	51	53
Travel Guides	10	13	19
Advance Planning for Trip			
7 days or less	9%	12%	8%
8 - 30 days	30	15	7
31 - 60 days	19	13	14
61 - 90 days	13	10	10
More than 3 Months	30	50	61
Total	100%	100%	100%
Average Planning Time in Days	92	121	149
Advance Airline Reservations			
7 days or less	16%	12%	7%
8 - 30 days	38	19	11
31 - 60 days	17	20	23
61 - 90 days	10	14	10
91 - 120 days	5	10	16
121 - 180 days	8	14	17
6 Months or More	6	13	16
Total	100%	100%	100%
Average Booking in Days	60	90	107

* 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
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from the Netherlands (n = 238)	Leisure Visitors from the Netherlands (n = 140)
Means of Booking Air Trip			
Airlines Directly	12%	12%	18%
Corporate Travel Department	11	8	3
Personal Computer	22	27	21
Travel Agent	48	47	48
Travel Club	1	1	1
Tour Operator	4	6	9
Other/Don't Know	3	0	0
Total	100%	100%	100%
Main Factor in Selecting Airline			
Airfare	24%	29%	28%
Schedule	15	29	30
Non-Stop Flight	13	12	10
Mileage Bonus/Frequent Flyer Program	12	7	8
Previous Good Experience	10	6	5
Safety Reputation	7	6	8
Airline Loyalty	4	1	-
In-flight Service	5	0	1
Employer policy	4	2	1
Other	6	10	11
Airline Seating Area			
Economy/Tourist/Coach	77%	93%	97%
Executive/Business	20	5	3
First Class	3	3	-
Total	100%	100%	100%
Use of Package			
Yes	11%	15%	22%
No	89	85	78
Total	100%	100%	100%
Advance Package Booking			
7 days or less	4%	-	-
8 - 30 days	26	22	13%
31 - 60 days	23	25	27
61 - 90 days	12	14	16
91 - 120 days	5	15	17
121 - 180 days	17	7	8
6 Months or More	14	25	20
Total	100%	100%	100%

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**Characteristics of Travelers from the Netherlands to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from the Netherlands (n = 238)	Leisure Visitors from the Netherlands (n = 140)
Travel Companions**			
Business Associates	10%	5%	1%
Family/Relatives	23	34	51
Friends	12	12	13
Spouse	27	31	44
Tour Group	2	1	1
Traveling Alone	39	31	12
Average Travel Party Size	1.5	1.7	2.0
Median Travel Party Size	1.0	1.0	2.0
Type of Lodging**			
Hotel / Motel	78%	86%	86%
Private Home	28	19	17
Other	4	6	8
Length of Stay			
Mean Nights in the U.S.	21.2	19.7	18.4
Mean Nights in California	11.0	11.1	9.1
% of California Nights	52%	56%	49%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	24%	30%	33%
Average Trips to the U.S. in Past Year	2.0	1.7	1.3
Average Trips to the U.S. in Past 5 Years	6.3	5.3	2.9
Average Number of States Visited	2.0	2.1	2.3
Average Number of Destinations Visited	2.9	3.4	3.8
Places Visited in the U.S.**			
Los Angeles	53%	43	55%
San Francisco	49	62	68
Las Vegas	28	36	44
New York City	17	12	12
San Diego	13	25	23
San Jose	7	8	3
Anaheim-Santa Ana	7	3	2
Yosemite	5	10	8
Grand Canyon	4	9	9
Chicago	4	6	7
DC Metro Area	4	3	4
Monterey-Salinas	4	6	6
Seattle	3	2	2
Sacramento	3	2	2
Riverside/San Bernardino	3	5	7
Santa Barbara	3	2	3

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**Characteristics of Travelers from the Netherlands to California
(2008 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 7,780)	All Visitors from the Netherlands (n = 238)	Leisure Visitors from the Netherlands (n = 140)
Activities Experienced While in the U.S.**			
Dining Out	87%	93%	91%
Shopping	85	78	82
Sightseeing in Cities	53	60	65
Historical Places	44	53	68
Visiting Small Towns	36	53	71
National Parks	35	57	70
Amusement/Theme Parks	34	41	47
Touring Countryside	30	56	73
Cultural Heritage Sites	28	33	41
Casinos/Gambling	24	28	33
Art Gallery/Museum	23	29	30
Guided Tours	22	7	23
Transportation While in the U.S.**			
Taxi/Limousine	42%	27%	17%
Airlines in U.S.	40	23	16
Rented Auto	36	52	55
Company or Private Auto	28	23	20
City Subway/Tram/Bus	26	23	29
Railroad between Cities	11	16	13
Bus between Cities	9	4	3
Motor Home/Camper	2	6	11
Visitor Spending in the U.S.			
Per Travel Party Per Trip (U.S.)	\$3,998	\$3,975	\$3,402
Per Visitor/Trip (U.S.)	2,607	2,405	1,664
Per Visitor Per Day	123	122	90
Per Visitor/Trip (California)	\$1,353	\$1,354	\$819
Spending by Category (Per Visitor/Trip)			
Lodging	\$800	\$917	\$500
Food/Beverages	526	561	445
Gifts/Souvenirs	450	190	123
Transportation in the U.S.	425	308	278
Entertainment	234	197	157
Expenses at the Airport	37	20	18
Other	135	212	142
Total Spending Per Visitor/Trip	\$2,607	\$2,405	\$1,664

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Payment Method for Trip Expenses			
Credit Cards	53%	62%	59%
Cash	37	34	38
Debit Cards	6	4	3
Travelers Checks	3	0	0
Total	100%	100%	100%
Age			
Average Age - Males	41	46	48
Average Age - Females	38	38	41
Occupation			
Manager/Executive	34%	26%	24%
Professional/Technical	32	35	36
Student	8	12	5
Clerical/Sales	7	6	3
Retired	6	8	11
Other	13	14	22
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	6%	4%	4%
\$20,000 - \$39,999	10	4	6
\$40,000 - \$59,999	13	12	14
\$60,000 - \$79,999	11	17	20
\$80,000 - \$99,999	11	13	11
\$100,000 - \$119,999	11	8	9
\$120,000 - \$139,999	7	6	6
\$140,000 - \$159,999	6	11	16
\$160,000 - \$179,999	4	5	-
\$180,000 - \$199,999	3	2	-
\$200,000 and over	18	17	15
Total	100%	100%	100%
Average Annual Income	\$107,200	\$113,200	\$105,500

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