

CHARACTERISTICS OF TRAVELERS FROM THE NETHERLANDS TO CALIFORNIA - 2014

The Netherlands is a large overseas market that generated approximately 126,000 visitors to California in 2014. Collectively visitors from the Netherlands spent approximately \$206 million in California.

During 2014 visitors to California from the Netherlands reported spending \$148 per day during a 11.1 night average stay or approximately \$1,643 per visitor. The average spending for all overseas visitors to California was about \$1,872 (\$153 per day; 12.2 nights in California).

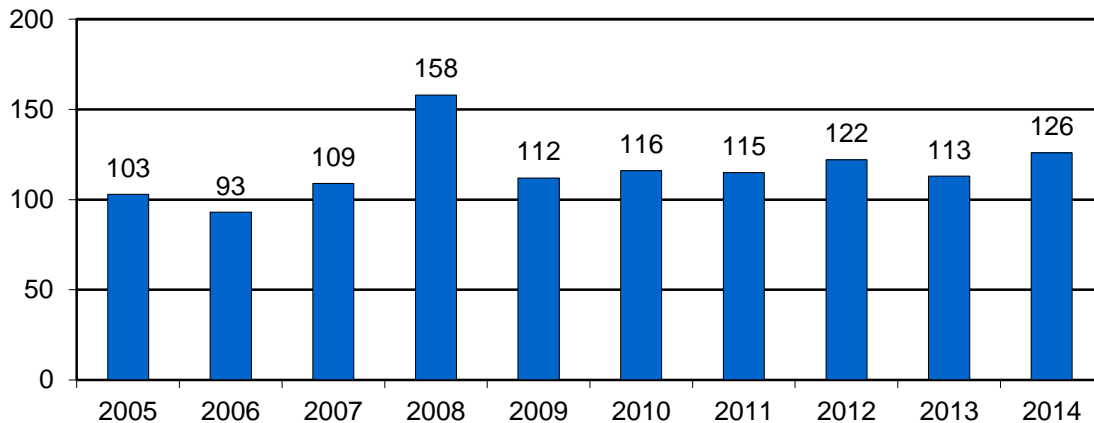
Visitors From The Netherlands

Year	Total U.S. Arrivals ¹	California Market Share ²	Visitors to California (est.)
2004	424,872	23.8%	101,000
2005	448,650	23.0%	103,000
2006	446,785	20.8%	93,000
2007	506,852	21.5%	109,000
2008	607,802	26.0%	158,000
2009	547,790	20.4%	112,000
2010	570,179	20.3%	116,000
2011	601,013	19.1%	115,000
2012	591,746	20.6%	122,000
2013	589,296	19.2%	113,000
2014	615,856	20.4%	126,000

1) U.S. Dept. of Homeland Security, Form I-94, Non-Resident Arrival Records.

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

Number of Visitors from the Netherlands to CA, 2005-2014 (in 000s)



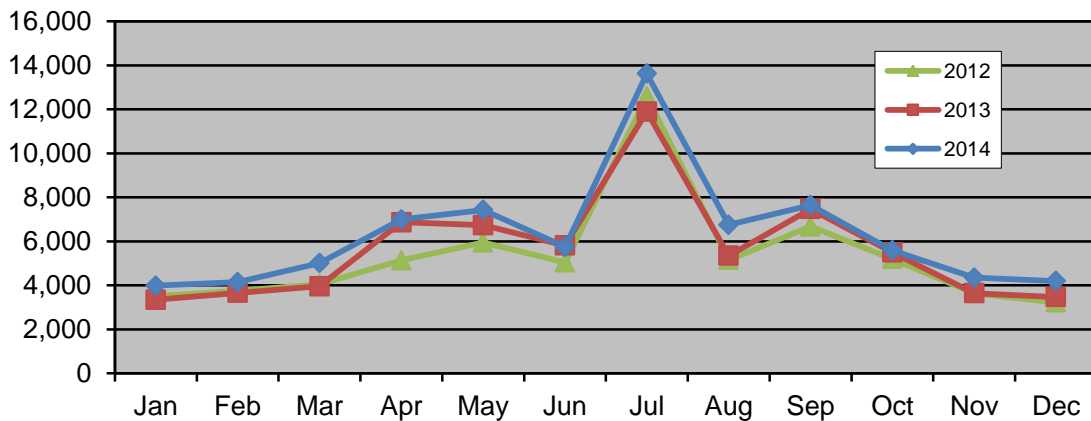
Sources: U.S. Dept. of Commerce, National Travel and Tourism Office,
Revised by Tourism Economics for Visit California (October, 2015).

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 78,000 in 2002. Since then, California's market share and visitor volumes from the Netherlands have demonstrated some overall recovery with year-to-year variability. In 2014, the volume of visitors to California from the Netherlands was higher than the previous year at 126,000, up from 113,000.

Arrivals at California Airports from the Netherlands

Monthly volumes of port-of-entry passenger arrivals from the Netherlands to California were very similar in 2014 as in 2013 and 2012. In general, arrivals of travelers from the Netherlands at California ports-of-entry peak in July. The lowest volumes are recorded during the late fall and winter months of January, February, November and December.

**Residents of the Netherlands
Monthly Port of Entry Arrivals to CA
2012-2014**



Sources: U.S. Department of Homeland Security, I-94 International Arrival Records, CIC Research, Inc., Visitor volume and spending estimates for California were prepared by Tourism Economics under a separate contract to Visit California.

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 vacation/holiday purposes
- Plan their trip using information from the airlines or a travel agency office
- Have longer trip planning and advance airline booking horizons
- Choose an airline based on non-stop flight
- Make use of a travel package which includes a rental car
- Travel with a spouse/partner
- Visit Flagstaff-Grand Canyon as part of their trip to the U.S.
- Visit national parks/monuments, small towns/the countryside, historical locations, guided tours and sightseeing while in the U.S.
- Use a rental car between cities for transportation while in the U.S.
- Use a rented bicycle/motorcycle/moped for transportation while in the U.S.
- Spend a greater proportion of their travel dollars on food/beverages
- Pay for trip expenses with a credit card
- Work in a management, business, science or arts occupation

Conversely, visitors from the Netherlands are less likely to:

- Book their air travel with a corporate travel department
- Travel alone
- Visit San Francisco or Las Vegas as part of their trip to the U.S.
- Spend their travel dollars in the U.S.
- Spend their travel dollars on gifts/souvenirs
- Pay for trip expenses with cash from home/travelers checks

Characteristics of Travelers from the Netherlands to California, 2014

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from the Netherlands (n = 123)	Leisure Visitors from the Netherlands (n = 88)***
Primary Purpose of Trip			
Vacation/Holidays	54%	69%	85%
Visit Friends/Relatives	18%	13%	15%
Business	13%	9%	-
Convention/Conference	8%	6%	-
Other Purpose	7%	4%	-
Total	100%	100%	100%
Purpose of Trip**			
Vacation/Holidays	66%	79%	92%
Visit Friends/Relatives	34%	29%	31%
Business	18%	12%	1%
Convention/Conference	12%	7%	-
Sources Used to Plan Trip**			
Airline	43%	54%	50%
Online Travel Agency	32%	34%	31%
Travel Agency Office	25%	37%	41%
Personal Recommendation	29%	35%	39%
Travel Guide	15%	18%	16%
Corporate Travel Department	12%	9%	6%
Tour Operator/Travel Club	10%	11%	11%
National/State/City Travel Office	8%	7%	8%
Advance Planning for Trip			
7 days or less	5%	1%	1%
8 - 30 days	25%	20%	13%
31 - 60 days	19%	10%	10%
61 - 90 days	15%	15%	17%
More than 3 Months	36%	54%	60%
Total	100%	100%	100%
Average Planning Time in Days	106 days	133 days	147 days
Advance Airline Reservations			
7 days or less	9%	4%	3%
8 - 30 days	35%	24%	17%
31 - 60 days	19%	15%	13%
61 - 90 days	12%	13%	14%
91 - 120 days	8%	24%	29%
121 - 180 days	10%	12%	14%
6 Months or More	8%	7%	9%
Total	100%	100%	100%
Average Booking in Days	74 days	88 days	99 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%.*** Caution – Small sample size

*** Caution – Small sample size

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

**Characteristics of Travelers from the Netherlands to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from the Netherlands (n = 123)	Leisure Visitors from the Netherlands (n = 88)***
Means of Booking Air Trip**			
Travel Agency Office	29%	34%	37%
Airlines Directly	29%	30%	32%
Internet Booking Service	27%	27%	25%
Corporate Travel Department	12%	6%	-
Tour Operator/Travel Club	10%	9%	9%
Other	1%	1%	-
Main Factor in Selecting Airline			
Airfare	31%	29%	32%
Non-Stop Flights	19%	39%	36%
Convenient Schedule	14%	16%	15%
Mileage Bonus/Frequent Flyer Program	8%	1%	-
Previous Good Experience	6%	9%	11%
Safety Reputation	6%	-	-
Loyalty to Carrier	3%	2%	3%
Employer policy	3%	-	-
In-flight Service Reputation	2%	1%	1%
On-time Reputation	2%	1%	1%
Other	5%	2%	1%
Total	100%	100%	100%
Airline Seating Area			
Economy/Tourist/Coach	83%	90%	93%
Executive/Business	9%	1%	1%
Premium Economy	8%	9%	6%
First Class	1%	1%	-
Total	100%	100%	100%
Use of Package			
Yes	15%	14%	19%
No	85%	86%	81%
Total	100%	100%	100%
Travel Package Includes**			
Airfare and Accommodation Only	7%	1%	2%
Attractions/Events/Entertainment	6%	3%	3%
Bus/Coach	6%	-	-
Cruise	6%	1%	1%
Guided Tours	5%	3%	3%
Meals	4%	2%	3%
Recreation	2%	1%	1%
Rental Car	2%	12%	16%
Tour Guide for Entire Trip	2%	-	-

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** Multiple response question. Travel package must include airfare and accommodation and may include others.

*** Caution – Small sample size

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

**Characteristics of Travelers from the Netherlands to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from the Netherlands (n = 123)	Leisure Visitors from the Netherlands (n = 88)***
Travel Companions**			
Traveling Alone	59%	46%	35%
Spouse/Partner	22%	33%	42%
Family/Relatives	15%	19%	22%
Friends	6%	5%	7%
Business Associates	3%	2%	-
Tour Group	1%	<1%	-
Average Travel Party Size	1.7	1.8	2.0
Median Travel Party Size	1.0	2.0	2.0
Type of Lodging**			
Hotel / Motel	76%	80%	77%
Private Home	30%	30%	35%
Other	6%	8%	8%
Length of Stay			
Mean Nights in the U.S.	23.4 nights	19.5 nights	19.2 nights
Mean Nights in California	12.2 nights	11.1 nights	9.0 nights
% of California Nights	52%	57%	47%
Prior Visitation to the U.S.			
First Trip to the U.S. (% Yes)	27%	25%	28%
Average Trips to the U.S. in Past Year	1.7 trips	1.6 trips	1.5 trips
Average Number of States Visited	2.1 states	2.1 states	2.3 states
Average Number of Destinations Visited	3.1 dest.	3.5 dest.	4.0 dest.
Places Visited in the U.S.**			
Los Angeles	62%	49%	51%
San Francisco	44%	60%	62%
Las Vegas	29%	40%	44%
New York City	16%	11%	12%
San Diego	14%	19%	22%
Anaheim-Santa Ana	8%	4%	4%
Flagstaff-Grand Canyon-Sedona	7%	21%	26%
San Jose	6%	2%	-
DC Metro Area	5%	-	-
Monterey-Salinas	4%	15%	19%
Oahu	4%	2%	1%
Santa Barbara	4%	7%	8%
Riverside/San Bernardino	3%	8%	8%
Chicago	3%	2%	2%
Seattle	3%	3%	4%
Sacramento	3%	2%	2%
Miami	3%	2%	2%

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**Characteristics of Travelers from the Netherlands to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from the Netherlands (n = 123)	Leisure Visitors from the Netherlands (n = 88)***
Activities Experienced While in the U.S.**			
Shopping	89%	93%	95%
Sightseeing	83%	91%	92%
National Parks/Monuments	52%	70%	78%
Experience Fine Dining	44%	38%	39%
Small Towns/Countryside	43%	62%	71%
Amusement/Theme Parks	40%	32%	38%
Historical Locations	35%	56%	61%
Guided Tours	33%	46%	58%
Art Gallery/Museums	31%	29%	26%
Casino/Gamble	24%	25%	31%
Cultural/Ethnic Heritage Sites	21%	24%	21%
Concert/Play/Musical	20%	16%	17%
Transportation While in the U.S.**			
Air Travel between U.S. Cities	45%	38%	43%
Rented Auto	44%	58%	64%
Auto, Private or Company	38%	37%	39%
City Subway/Tram/Bus	31%	31%	34%
Taxicab/Limousine	31%	34%	28%
Bus between Cities	19%	11%	12%
Ferry/River Taxi/Srt. Scenic Cruise	10%	9%	11%
Railroad between Cities	7%	4%	4%
Rented Bicycle/Motorcycle/Moped	5%	14%	16%
Cruise Ship/River Boat 1+ Nights	4%	4%	5%
Motor Home/Camper	2%	3%	4%
Visitor Spending****			
CA Visitor Spending in the U.S. per Visitor	\$3,590	\$2,393	\$1,915
Per Visitor Per Day (CA)	\$153	\$148	\$98
Per Visitor/Trip (California)	\$1,872	\$1,643	\$1,090
Spending by Category (Per Visitor/Trip)			
Accommodations	30.4%	28.3%	22.4%
Air Transportation in the U.S.	6.6%	5.3%	6.5%
Entertainment	12.5%	15.1%	16.1%
Food/Beverages	18.1%	27.8%	32.8%
Gifts/Souvenirs	21.1%	12.1%	13.1%
Ground Transportation in the U.S.	6.2%	5.1%	3.8%
Other	4.9%	6.3%	5.3%

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**** 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 the Netherlands to California
(2014 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors* (n = 8,032)	All Visitors from the Netherlands (n = 123)	Leisure Visitors from the Netherlands (n = 88)**
Payment Method for Trip Expenses			
Purchases Using Credit Card	44%	53%	52%
Cash from Home/Travelers Checks	27%	4%	3%
Cash Adv./Withdrawal Using Credit Card	18%	20%	19%
Cash Adv./Withdrawal Using Debit Card	6%	14%	16%
Purchases Using Debit Card	6%	8%	11%
Total	100%	100%	100%
Age			
Average Age - Males	40 years	45 years	46 years
Average Age - Females	38 years	37 years	40 years
Occupation			
Mgmt., Business, Science & Arts	44%	53%	54%
Service Occupations	11%	8%	10%
Student	11%	9%	6%
Sales and Office	11%	9%	8%
Retired	8%	11%	13%
Homemaker	4%	-	-
Prod., Trans., & Material Moving	4%	4%	5%
Military/Government	3%	4%	5%
Nat. Res., Const., & Maintenance	2%	2%	-
Other	2%	-	-
Total	100%	100%	100%
Annual Household Income			
Under \$20,000	15%	18%	20%
\$20,000 - \$39,999	13%	6%	8%
\$40,000 - \$59,999	14%	11%	8%
\$60,000 - \$79,999	11%	12%	13%
\$80,000 - \$99,999	10%	3%	3%
\$100,000 - \$119,999	9%	14%	7%
\$120,000 - \$139,999	6%	17%	20%
\$140,000 - \$159,999	4%	3%	4%
\$160,000 - \$179,999	3%	2%	1%
\$180,000 - \$199,999	2%	4%	4%
\$200,000 and over	11%	11%	12%
Total	100%	100%	100%
Average Annual Income	\$95,782	\$95,311	\$92,280

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