

## CHARACTERISTICS OF TRAVELERS FROM THE NETHERLANDS TO CALIFORNIA - 2015

The Netherlands is a relatively large overseas market that generated approximately 124,000 visitors to California in 2015, down slightly from the 126,000 visitors in 2014. Collectively visitors from the Netherlands spent approximately \$242 million in California in 2015, compared with \$206 million in 2014.

During 2015 visitors to California from the Netherlands reported spending \$186 per day during a 10.5 night average stay or approximately \$1,952 per visitor. The average spending for all overseas visitors to California was about \$1,979 (\$157 per day; 12.6 nights in California).

### Visitors From The Netherlands

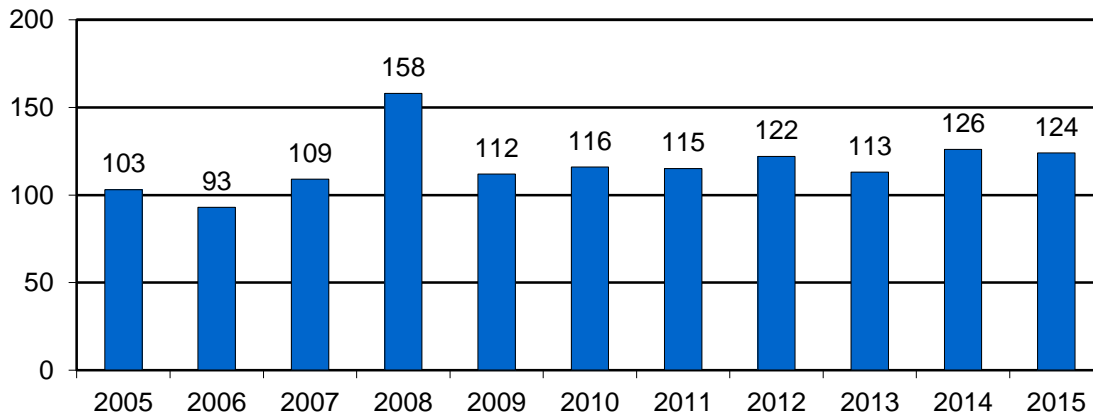
Year	Total U.S. Arrivals <sup>1</sup>	California Market Share <sup>2</sup>	Visitors to California (est.)
2005	448,650	23.0%	103,000
2006	446,785	20.8%	93,000
2007	506,852	21.5%	109,000
2008	607,802	26.0%	158,000
2009	547,790	20.4%	112,000
2010	570,179	20.3%	116,000
2011	601,013	19.1%	115,000
2012	591,746	20.6%	122,000
2013	589,296	19.2%	113,000
2014 <sup>3</sup>	615,856	20.5%	126,000
2015 <sup>3</sup>	635,687	19.5%	124,000

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

2) U.S. Dept. of Commerce, NTTO, "Survey of International Air Travelers."

3) Sourced from Tourism Economics.

### Number of Visitors from the Netherlands to CA, 2005-2015 (in 000s)



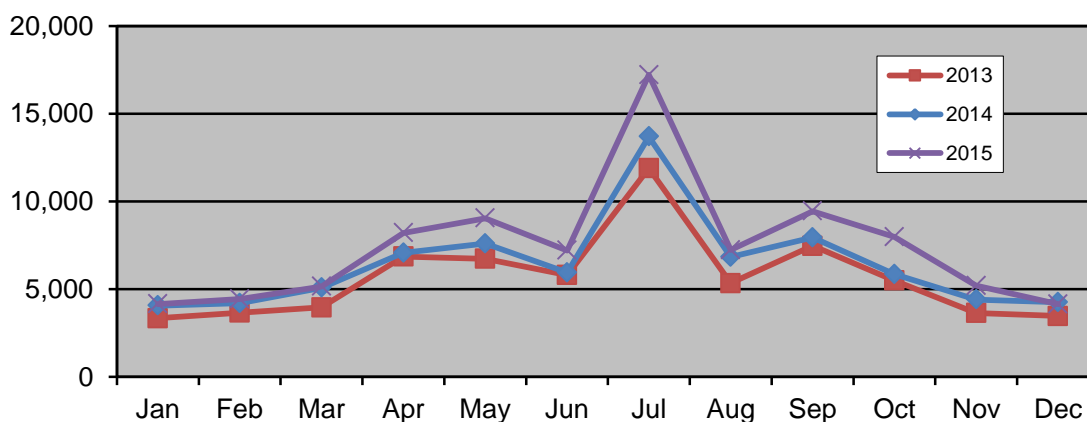
Sources: U.S. Dept. of Commerce, National Travel and Tourism Office,  
Revised by Tourism Economics for Visit California (October, 2015).

The volume of visitors to California from the Netherlands increased throughout the 1990s 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 2015, the volume of visitors to California from the Netherlands was slightly lower than the previous year at 124,000, down from 126,000.

### Arrivals at California Airports from the Netherlands

Monthly volumes of port-of-entry passenger arrivals from the Netherlands to California were similar but slightly higher in 2015 as in 2014 and 2013. 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  
2013-2015**



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 table on the following pages. 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:

- Have longer trip planning and advance airline booking horizons
- Choose an airline based on non-stop flight
- Sit in economy/tourist/coach class
- Visit Flagstaff-Grand Canyon as part of their trip to the U.S.
- Visit national parks/monuments, small towns/the countryside, historical locations, and go on guided tours 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 accommodation
- Pay for trip expenses with a credit card
- Work in a management, business, science or arts occupation
- Have a higher average yearly income

Conversely, visitors from the Netherlands are less likely to:

- Visit Los Angeles as part of their trip to the U.S.
- Visit amusement/theme parks
- 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, 2015

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from the Netherlands (n = 265)	Leisure Visitors from the Netherlands (n = 171)
<b>Primary Purpose of Trip</b>			
Vacation/Holidays	54%	62%	83%
Visit Friends/Relatives	18%	13%	17%
Business	13%	13%	-
Convention/Conference	9%	8%	-
Other Purpose	6%	4%	-
Total	100%	100%	100%
<b>Purpose of Trip**</b>			
Vacation/Holidays	67%	75%	89%
Visit Friends/Relatives	34%	28%	31%
Business	17%	15%	<1%
Convention/Conference	12%	9%	<1%
<b>Sources Used to Plan Trip**</b>			
Airline	43%	51%	49%
Online Travel Agency	34%	31%	32%
Personal Recommendation	29%	29%	34%
Travel Agency Office	23%	26%	31%
Travel Guide	15%	15%	16%
Corporate Travel Department	12%	12%	6%
Tour Operator/Travel Club	9%	9%	11%
National/State/City Travel Office	7%	4%	5%
<b>Advance Planning for Trip</b>			
7 days or less	5%	4%	3%
8 - 30 days	24%	19%	12%
31 - 60 days	19%	14%	11%
61 - 90 days	15%	12%	14%
More than 3 Months	38%	54%	60%
Total	100%	100%	100%
Average Planning Time in Days	108 days	122 days	days
<b>Advance Airline Reservations</b>			
7 days or less	8%	7%	5%
8 - 30 days	33%	25%	16%
31 - 60 days	20%	14%	13%
61 - 90 days	13%	13%	15%
91 - 120 days	9%	21%	27%
121 - 180 days	10%	11%	14%
6 Months or More	8%	8%	10%
Total	100%	100%	100%
Average Booking in Days	76 days	88 days	105 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

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

**Characteristics of Travelers from the Netherlands to California  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from the Netherlands (n = 265)	Leisure Visitors from the Netherlands (n = 171)
<b>Means of Booking Air Trip**</b>			
Airlines Directly	31%	36%	39%
Internet Booking Service	29%	26%	26%
Travel Agency Office	26%	24%	26%
Corporate Travel Department	12%	9%	2%
Tour Operator/Travel Club	9%	8%	10%
Other	1%	1%	-
<b>Main Factor in Selecting Airline</b>			
Airfare	29%	31%	34%
Non-Stop Flights	17%	29%	27%
Convenient Schedule	15%	15%	13%
Previous Good Experience	9%	8%	11%
Mileage Bonus/Frequent Flyer Program	8%	5%	6%
Safety Reputation	9%	2%	-
Loyalty to Carrier	3%	3%	3%
In-flight Service Reputation	3%	<1%	<1%
Employer policy	3%	2%	-
On-time Reputation	2%	1%	2%
Other	3%	4%	4%
Total	100%	100%	100%
<b>Airline Seating Area</b>			
Economy/Tourist/Coach	82%	93%	87%
Premium Economy	10%	5%	8%
Executive/Business	8%	3%	5%
First Class	1%	-	-
Total	100%	100%	100%
<b>Use of Package</b>			
Yes	14%	12%	17%
No	86%	88%	83%
Total	100%	100%	100%
<b>Travel Package Includes**</b>			
Attractions/Events/Entertainment	6%	2%	3%
Meals	6%	2%	3%
Bus/Coach	6%	2%	4%
Guided Tours	6%	4%	5%
Rental Car	4%	7%	10%
Tour Guide for Entire Trip	5%	1%	1%
Airfare and Accommodation Only	3%	2%	2%
Cruise	2%	1%	1%
Recreation	1%	<1%	1%

\* Overseas visitors to the U.S. do not include visitors from Canada or Mexico.

\*\* Multiple response question. Travel package must include airfare and accommodation and may include others.  
Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers."

**Characteristics of Travelers from the Netherlands to California  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from the Netherlands (n = 265)	Leisure Visitors from the Netherlands (n = 171)
<b>Travel Companions**</b>			
Traveling Alone	59%	54%	40%
Spouse/Partner	22%	30%	43%
Family/Relatives	15%	13%	18%
Friends	6%	4%	5%
Business Associates	4%	4%	-
Tour Group	1%	<1%	-
<b>Average Travel Party Size</b>	1.7	1.6	1.8
<b>Median Travel Party Size</b>	1.0	1.0	2.0
<b>Type of Lodging**</b>			
Hotel / Motel	73%	79%	75%
Private Home	32%	29%	33%
Other	6%	11%	14%
<b>Length of Stay</b>			
Mean Nights in the U.S.	22.6 nights	18.8 nights	19.2 nights
Mean Nights in California	12.6 nights	10.5 nights	9.7 nights
% of California Nights	52%	56%	51%
<b>Prior Visitation to the U.S.</b>			
First Trip to the U.S. (% Yes)	28%	24%	25%
Average Trips to the U.S. in Past Year	1.7 trips	1.6 trips	1.5 trips
<b>Average Number of States Visited</b>	2.0 states	2.1 states	2.3 states
<b>Average Number of Destinations Visited</b>	3.1 dest.	3.5 dest.	4.0 dest.
<b>Places Visited in the U.S.**</b>			
Los Angeles	60%	48%	54%
San Francisco	45%	52%	54%
Las Vegas	30%	33%	43%
New York City	15%	9%	10%
San Diego	14%	15%	17%
Anaheim-Santa Ana	8%	4%	5%
Flagstaff-Grand Canyon-Sedona	7%	19%	26%
San Jose	6%	7%	5%
DC Metro Area	5%	5%	1%
Monterey-Salinas	5%	10%	13%
Santa Barbara	4%	5%	6%
Riverside/San Bernardino	4%	12%	14%
Oahu	3%	1%	<1%
Seattle	3%	2%	3%
Chicago	3%	2%	3%
Miami	2%	2%	2%
Sacramento	2%	3%	2%

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

**Characteristics of Travelers from the Netherlands to California  
(2015 - cont.)**

Trip & Traveler Characteristics	All Overseas Visitors to CA* (n = 8,348)	All Visitors from the Netherlands (n = 265)	Leisure Visitors from the Netherlands (n = 171)
<b>Activities Experienced While in the U.S.**</b>			
Shopping	87%	81%	86%
Sightseeing	83%	88%	89%
National Parks/Monuments	51%	65%	78%
Small Towns/Countryside	42%	54%	64%
Experience Fine Dining	40%	31%	34%
Amusement/Theme Parks	39%	26%	34%
Historical Locations	34%	44%	50%
Guided Tours	31%	40%	49%
Art Gallery/Museums	33%	28%	26%
Casino/Gamble	24%	26%	33%
Cultural/Ethnic Heritage Sites	20%	16%	15%
Concert/Play/Musical	20%	14%	14%
<b>Transportation While in the U.S.**</b>			
Rented Auto	44%	59%	66%
Air Travel between U.S. Cities	44%	36%	41%
Auto, Private or Company	37%	38%	39%
City Subway/Tram/Bus	31%	31%	32%
Taxicab/Limousine	31%	29%	25%
Bus between Cities	19%	15%	16%
Ferry/River Taxi/Srt. Scenic Cruise	10%	10%	12%
Railroad between Cities	7%	6%	7%
Rented Bicycle/Motorcycle/Moped	5%	10%	11%
Cruise Ship/River Boat 1+ Nights	4%	2%	3%
Motor Home/Camper	2%	4%	6%
<b>Visitor Spending***</b>			
CA Visitor Spending in the U.S. per Visitor	\$3,401	\$2,843	\$3,793
Per Visitor Per Day (CA)	\$157	\$186	\$198
Per Visitor/Trip (California)	\$1,979	\$1,952	\$1,916
<b>Spending by Category (Per Visitor/Trip)</b>			
Accommodations	31.5%	40.1%	36.3%
Air Transportation in the U.S.	5.9%	3.6%	4.7%
Entertainment	12.9%	11.4%	4.7%
Food/Beverages	19.9%	23.3%	29.2%
Gifts/Souvenirs	19.2%	10.8%	14.6%
Ground Transportation in the U.S.	6.3%	6.3%	5.9%
Other	4.2%	4.4%	4.8%

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\*\* Multiple response question. Table may add to more than 100%.

\*\*\*\* 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  
(2015 - cont.)**

<b>Trip &amp; Traveler Characteristics</b>	<b>All Overseas Visitors to CA* (n = 8,348)</b>	<b>All Visitors from the Netherlands (n = 265)</b>	<b>Leisure Visitors from the Netherlands (n = 171)</b>
<b>Payment Method for Trip Expenses</b>			
Purchases Using Credit Card	43%	54%	56%
Cash from Home/Travelers Checks	27%	6%	4%
Cash Adv./Withdrawal Using Credit Card	18%	24%	21%
Cash Adv./Withdrawal Using Debit Card	6%	11%	13%
Purchases Using Debit Card	6%	5%	6%
Total	100%	100%	100%
<b>Age</b>			
Average Age - Males	41 years	44 years	47 years
Average Age - Females	38 years	39 years	39 years
<b>Occupation</b>			
Mgmt., Business, Science & Arts	46%	54%	56%
Service Occupations	11%	7%	7%
Student	12%	10%	7%
Sales and Office	11%	9%	8%
Retired	8%	10%	11%
Homemaker	4%	1%	-
Prod., Trans., & Material Moving	3%	4%	6%
Military/Government	3%	2%	3%
Nat. Res., Const., & Maintenance	3%	2%	1%
Other	1%	1%	1%
Total	100%	100%	100%
<b>Annual Household Income</b>			
Under \$20,000	15%	17%	20%
\$20,000 - \$39,999	15%	9%	6%
\$40,000 - \$59,999	15%	14%	12%
\$60,000 - \$79,999	14%	13%	12%
\$80,000 - \$99,999	10%	8%	10%
\$100,000 - \$119,999	10%	9%	6%
\$120,000 - \$139,999	4%	9%	11%
\$140,000 - \$159,999	4%	2%	3%
\$160,000 - \$179,999	3%	1%	1%
\$180,000 - \$199,999	1%	2%	3%
\$200,000 and over	10%	17%	16%
Total	100%	100%	100%
Average Annual Income	\$89,309	\$104,436	\$107,632

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