



NETHERLANDS

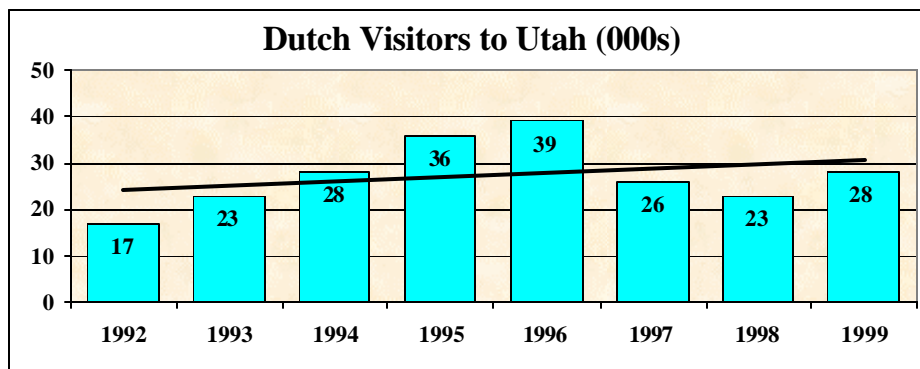
Market Profile Summary

International travel has become more popular in the Netherlands as total outbound travel has increased steadily at nearly 9% over the past five years. Long-haul travel has grown even faster, averaging just over 10% growth per year.

The Netherlands is part of a tri-country area known as the Benelux Countries (Netherlands, Belgium and Luxembourg). Collectively, the Benelux Countries have represented around 40,000 visits to Utah each year, of which the most significant is the Dutch market. Visitation patterns from the Benelux Countries to Utah mirror the German market performance. From 1992 to 1996, the number of visitors to Utah from the Benelux Countries increased significantly. However, since 1996, visitation has dropped and currently remains stable.

Citizens of the Netherlands receive an average of 4-6 weeks of vacation time each year as well as 13 full months of salary, enabling them to plan for nearly any type of vacation. Benelux markets are price sensitive and currency fluctuations do influence international travel decisions. Utah enjoys strong identity factors in the Benelux markets for its vast expanses of scenic landscapes, wild rivers and national parks. Winter sports travel, particularly among the Dutch, represents a great potential for additional product development. Visitors from the Netherlands spend on average \$74 per visitor per day and remain in Utah approximately 4.4 nights.

The Dutch economy has grown steadily and consistently at around 3.0% per year since 1996, although it has slowed some in the last few years. Unemployment is the lowest among all European Union countries and inflation has remained stable for the past five years. Stability in the economy has spurred consumer confidence, which is good news for outbound travel. Forecasts indicate continued growth in the Dutch travel market of around 7% for the next few years.



SOURCE: TI/ITA, U.S. Dept. of Commerce

UTAH VISITORS FROM THE NETHERLANDS SUMMARY - 1997-1999*

Utah Division of Travel Development

DEMOGRAPHICS

AGE (years)

Average Age (mean)	42.0
18-34 Years	38%
35-54 Years	45%
55+ Years	17%

HOUSEHOLD INCOME (\$US)

Average HH Income	\$62,300
< \$40,000	27%
\$40,000 - \$80,000	44%
\$80,000 - \$120,000	28%
\$120,000+	2%

PARTY COMPOSITION

Avg. Travel Party (mean)	1.9
Family/Relatives	44%
Spouse	33%
Friends	12%
Traveling Alone	11%
Business Associates	5%
Tour Group	2%
Adults Only	95%
Adults and Children	6%

GENDER

Men	61%
Women	40%

FREQUENT TRAVELERS

Repeat Visitor to the U.S.	66%
U.S. Trips last 12 Months	1.3
U.S. Trips last 5 Years	3.0
1 Trip	39%
2 - 5 Trips	53%
5+ Trips	8%

OTHER DESTINATIONS VISITED

# of States Visited	3.8
# of Destinations Visited	5.7
California	68%
San Francisco	32%
Los Angeles	32%
Yosemite N.P.	18%
Riverside/San Bernadino	12%
Death Valley N.P.	10%
Nevada	56%
Las Vegas	45%
Arizona	56%
Grand Canyon N.P.	29%
Colorado	24%
Denver	13%
Wyoming	12%
Yellowstone N.P.	9%
New York	11%
New York City	11%

TRAVEL PATTERNS

ADVANCE TRIP DECISION

Advance Trip Decision	129 Days
Advance Air Reservations	85 Days
Use of Pre-Booked Lodging	71%

USE OF PACKAGES

YES	32%
Air/Rental Car	20%
Air/Lodging	19%
Air/Lodging/Tour	10%
Guided Tour	7%
Air/Lodging/Rental Car	2%
Advance Package Booking	121 Days
# of Nights Pre-paid as Part of a Package	14.0

INFORMATION SOURCES

Travel Agency	80%
Travel Guides	27%
Friends/Relatives	21%
Personal Computer	16%
Tour Company	7%
Newspapers/Magazines	6%
Airlines Directly	5%
State/City Travel Office	4%
Other	11%

ACCOMMODATIONS

Hotel/Motel	72%
Private Home	12%
Other	21%

TRANSPORTATION IN U.S.

Rented Auto	56%
Taxi/Cab/Limousine	36%
Airlines in U.S.	28%
City Subway/Tram/Bus	19%
Railroad Between Cities	18%
Company or Private Auto	15%
Bus Between Cities	11%
Motor Home/Camper	5%

LENGTH OF STAY

# of Nights In UT (mean)	4.4
# of Nights in US (mean)	22.7

UTAH DESTINATIONS VISITED

Bryce Canyon N.P.	27%
Salt Lake City	22%
Zion N.P.	14%
Monument Valley	6%
Glen Canyon	4%

PURPOSE/ACTIVITIES

PURPOSE OF TRIP

Leisure & VFR	89%
Leisure/Rec./Holidays	79%
Visit Friends/Relatives	10%
Business & Convention	11%
Business/Professional	7%
Convention/Conference	3%
Study/Teaching	1%

PORT OF ENTRY

Los Angeles	23%
Washington D.C.	15%
San Francisco	10%
Minneapolis/St. Paul	9%
New York	8%

LEISURE ACTIVITIES

Visit National Parks	91%
Shopping	89%
Dining in Restaurants	88%
Touring Countryside	86%
Sightseeing in Cities	80%
Visit Historic Places	67%
Visit Small Towns	62%
Casinos/Gambling	48%
Amusement/Theme Parks	45%
Cultural or Heritage Sites	45%
Visit Am. Indian Comm.	43%
Art Gallery/Museum	35%
Camping/Hiking	33%
Guided Tours	25%
Water Sports/Sunbathing	25%
Concert/Play/Musical	20%
Golfing/Tennis	9%
Environ./Eco Excursions	8%
Nightclubs/Dancing	8%
Attend Sports Event	5%
Snow Skiing	5%
Ethnic Heritage Sites	5%
Cruises	2%
Ranch Vacations	1%
Hunting/Fishing	--

PERFORMANCE

Total Int'l. Visitation (000s)	28
Market Share	5.4%
Avg. Spending Per-Visitor-Per-Day (mean)	\$74

*SOURCE: U.S. Department of Commerce, ITA/Tourism Industries