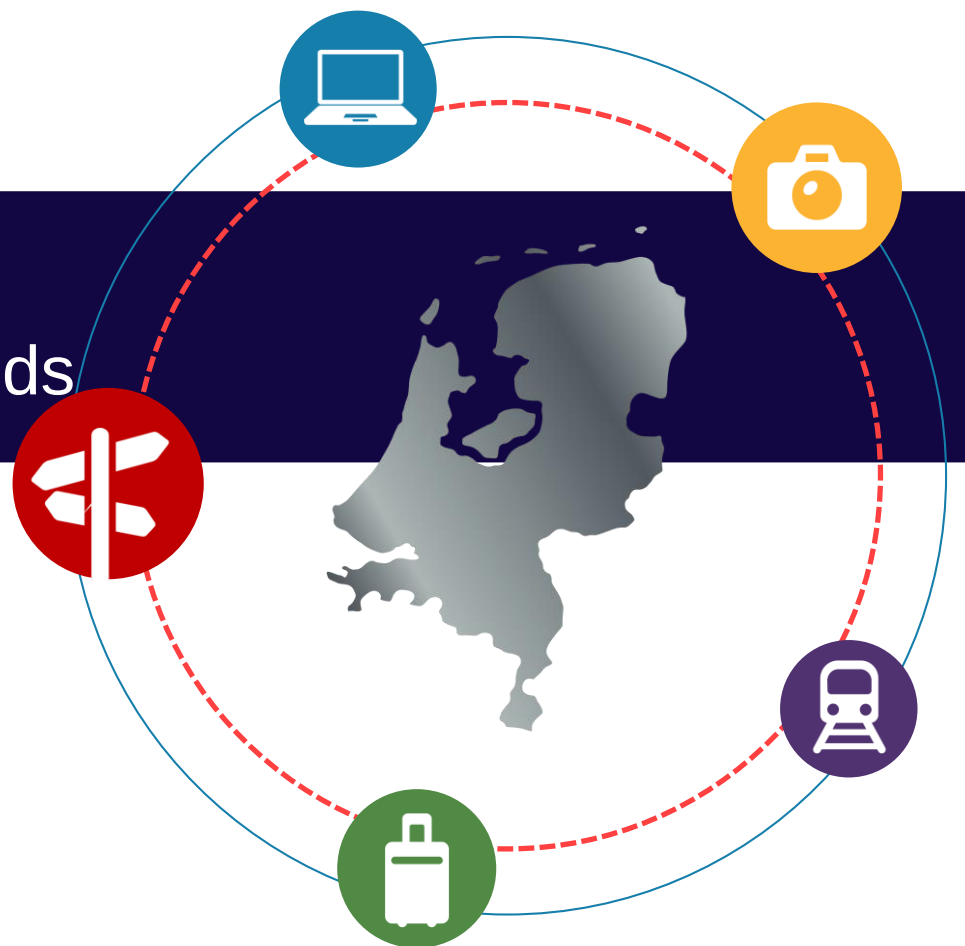


Market and Trade Profile: Netherlands

Netherlands





Overview

- **Chapter 1: Inbound market statistics** provides insights on key statistics about Dutch travellers and who they are. It takes a look at Britain and its competitive set as well as activities of Dutch visitors in the UK.
- **Chapter 2: Understanding the market** takes a close look at Dutch consumer trends, booking, planning and further travel behaviour of this source market. Perceptions of Britain held by the Dutch are also highlighted.
- **Chapter 3: Access and travel trade** shows how the Dutch travel to the UK, how to best cater for their needs and wants during their stay and gives insights into the Dutch travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out.

Contents

Chapter 1:

Inbound market statistics

1.1 Key statistics	6
1.2 Visitor demographics	17
1.3 Britain & competitors	21
1.4 Inbound activities	23

Chapter 2:

Understanding the market

2.1 Structural drivers	31
2.2 Consumer trends	35
2.3 Booking and planning	39
2.4 Reaching the consumer	42
2.5 Perceptions of Britain	47

Chapter 3:

Access and travel trade

3.1 Access	52
3.2 Travel Trade	56
3.3 Caring for the consumer	62
3.4 Working with VisitBritain	65
3.5 Useful research resources	66





Chapter 1: Inbound market statistics

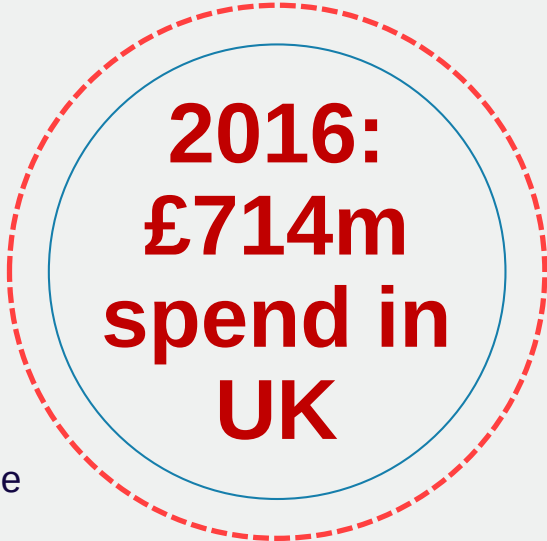




Chapter 1: Inbound market statistics

Chapter summary

- The Dutch outbound market is forecast to account for just under 38 million trips abroad with at least one overnight stay by 2020. The UK was the 5th most popular destination behind France, Germany, Spain and Austria for such trips in 2016.
- The Dutch rank globally in 17th place for international tourism expenditure with more than US\$18.1bn.
- The Netherlands was 6th largest inbound source market for the UK for volume and 9th for spend in 2016.
- Just looking at holidays, Germany, France and Spain receive the highest number of Dutch holidays; Britain is in 7th place.
- The Dutch source market has an excellent regional and good seasonal spread with Q2 (April-June) the strongest quarter.
- 93% of departing Dutch visitors are either 'very' or 'extremely' likely to recommend Britain for a holiday or short break.



**2016:
£714m
spend in
UK**

Source: International Passenger Survey by ONS, NBTC-NIPO based on CVO 2016, Oxford Economics, UNWTO, CAA 2016



Chapter 1.1: Key statistics

Key insights

- The Netherlands was Britain's 6th largest source market in terms of visits and 9th most valuable for visitor spending in 2016.
- 42% of spending came from holiday trips and 31% from business visits in 2016.
- In 2016 the number of Dutch business trips to the UK was 658,000, just shy of the record of 660,000 set in 2014.
- London is the leading destination for a trip to Britain but South East, Scotland and the South West are also popular (based on average nights 2014-2016)
- The most popular activities undertaken by Dutch travellers in Britain include shopping, going to the pub, visiting parks and gardens, visiting castles and historic houses as well as museums and art galleries, followed by religious buildings.
- 12% of Dutch visits were bought as part of a package or an all-inclusive tour, twice the all-market average.

**The UK was 5th
most popular
destination for
Dutch outbound
travel (2016)**

Source: International Passenger Survey by ONS, Oxford Economics

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2016
International tourism expenditure (US\$bn)	18.1
Global rank for international tourism expenditure	17
Number of outbound overnight visits (m)	30.6
Most visited destination	France

Inbound travel to Britain overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10 year trend			
2007	1,823	8,308	537
2008	1,818	8,483	700
2009	1,715	7,256	599
2010	1,758	7,870	717
2011	1,789	8,413	624
2012	1,735	7,594	627
2013	1,891	8,630	709
2014	1,972	8,292	701
2015	1,897	8,370	676
2016	2,062	8,972	714
Share of UK total in 2016	5.5%	3.2%	3.2%

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics



1.1 Key statistics – volume and value

Inbound volume and value

Measure	2016	Change vs. 2015	Rank out of UK top markets
Visits (000s)	2,062	9%	6
Nights (000s)	8,972	7%	11
Spend (£m)	714	6%	9

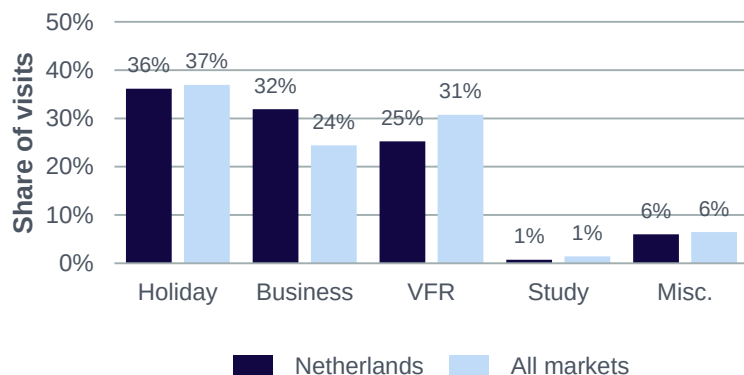
Nights per visit, spend

Averages by journey purpose in 2016	Nights per visit	Spend per night	Spend per visit
Holiday	5	£87	£406
Business	2	£155	£337
Visiting Friends/ Relatives	5	£48	£262
All visits	4	£80	£346

Source: International Passenger Survey by ONS

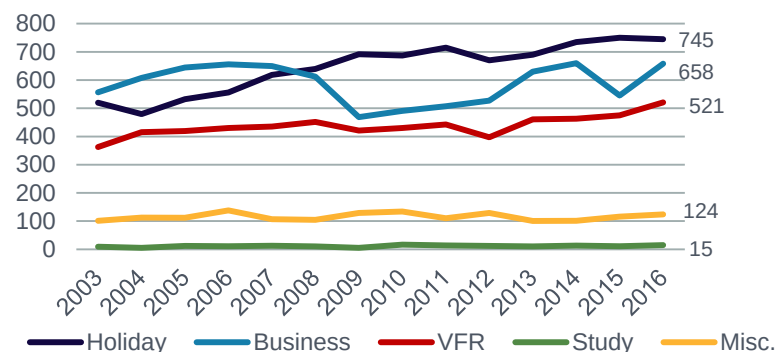
1.1 Key statistics: journey purpose

Journey purpose 2016



- 36% of all visits to the UK from the Netherlands were made for holiday purposes, followed by 32% of visits made for business purposes in 2016.
- 76% of holiday visits from the Netherlands to the UK (excl. UK nationals) in 2015 were made by repeat visitors. These repeat visitors came on average between three and four times (a high average visit frequency compared to other markets) and spent on average £1,647 in the UK over the past ten years.

Journey purpose trend (visits 000s)



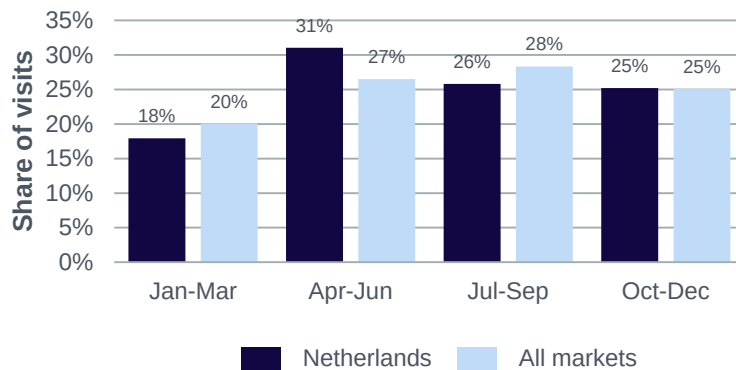
- Holiday and business visits continue to lead in terms of volume of visits from the Dutch market. In 2016, 42% of spending came courtesy of holiday visitors, 31% from business visits and 19% from visits to friends and/or relatives.
- In 2016 the number of business trips (658,000) was just shy of the 660,000 record set in 2014.
- 95% of Dutch visitors (excl. expats) coming to the UK for business had been to the UK before as well as 92% of those coming to visit friends or relatives who live in the UK.

Source: International Passenger Survey by ONS; repeat / first time visitors question asked in 2015



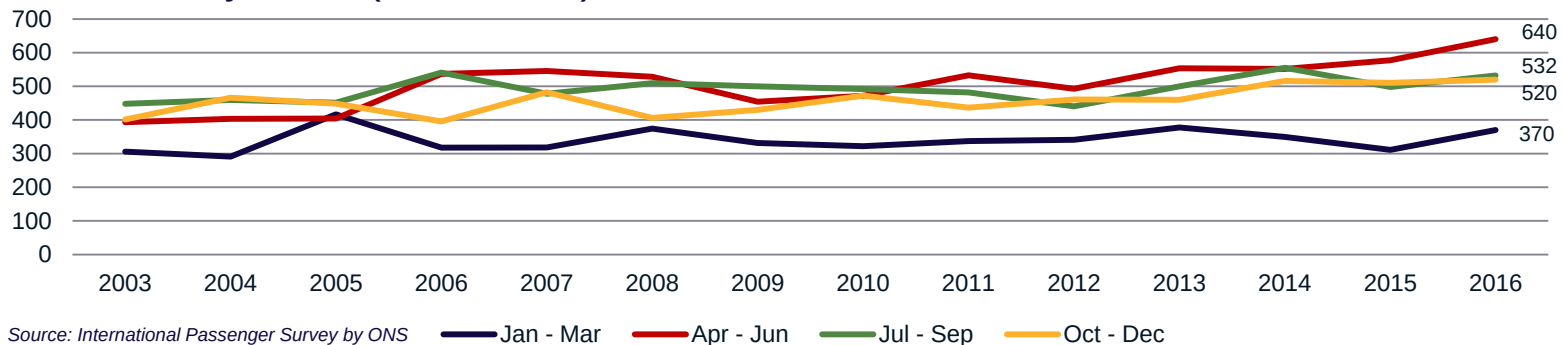
1.1 Key statistics: seasonality

Seasonality 2016



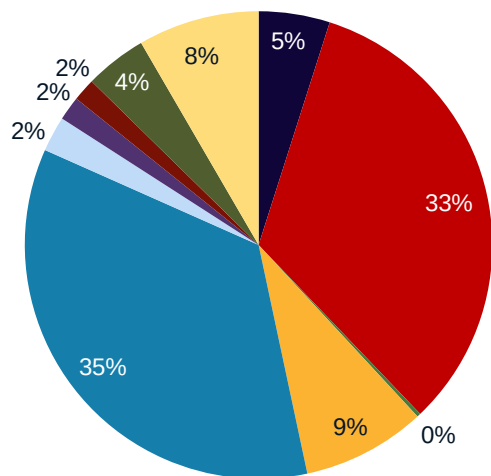
- In 2016, 31% of visits from the Netherlands to the UK were made in the second quarter. The summer quarter, which is high season for many other markets, saw a below average share of Dutch visits with 26%. 1 in 4 visits from the Netherlands were made in the last quarter and about 1 in 5 in the first quarter.
- Dutch visits in the spring quarter tend to produce the highest volume of visits in recent years, followed by the summer quarter. Visits in the last quarter have remained fairly stable.

Seasonality trend (visits 000s)



1.1 Key statistics: length of stay and accommodation

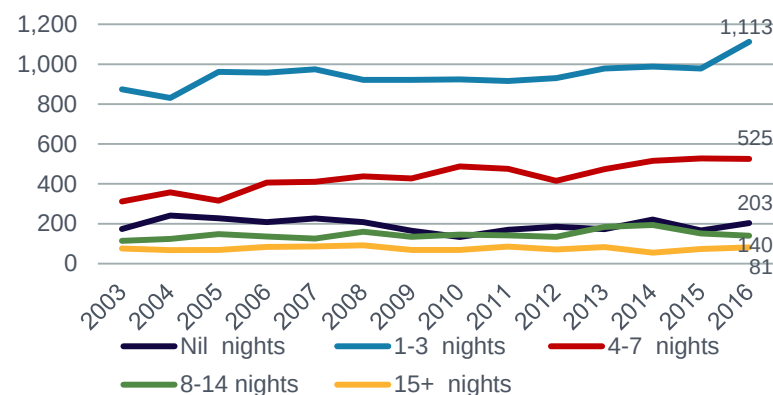
Accommodation stayed in, 2016
(nights, %share)



- Bed & Breakfast
- Holiday village/centre
- Hotel/guest house
- Own home
- Camping/caravan
- Free guest with relatives or friends
- Hostel/university/school
- Other
- Paying guest family or friends house
- Rented house/flat

Source: International Passenger Survey by ONS

Duration of stay trend (visits 000s)



- Short trips of 1-3 nights and 4-7 nights are the most popular durations of stay amongst Dutch visitors.
- Two forms of accommodation dominate the picture with 35% of nights spent staying at a hotel or guest house closely followed by 33% of nights which were spent staying for free with relatives or friends living in the UK in 2016.

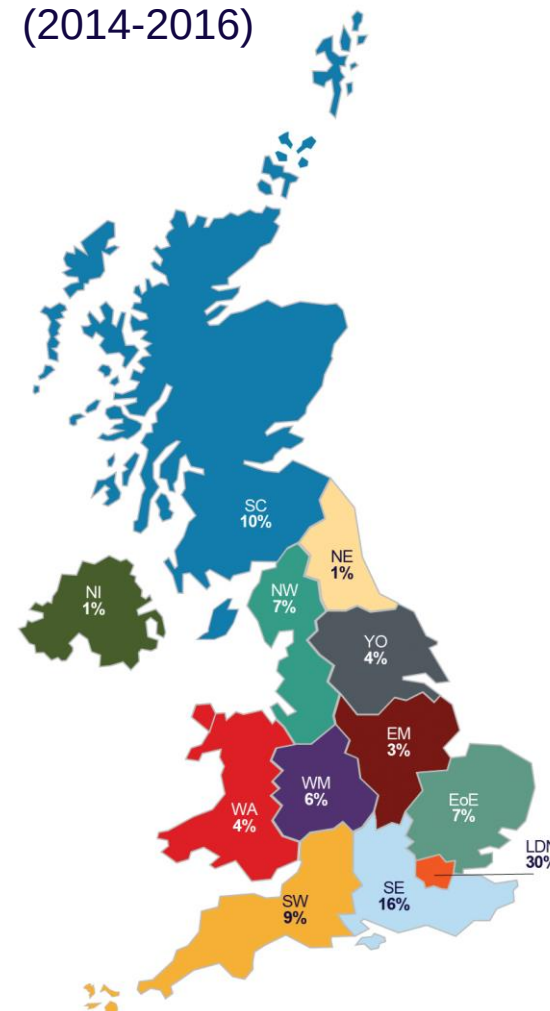
1.1 Key statistics: regional spread

Visits to the UK (2014-2016 average)

Region	Nights stayed (000)	Visits (000)
Total	8,545	1,977
 Scotland (SC)	886	140
 Wales (WA)	338	64
 Northern Ireland (NI)	100	17
 London (LDN)	2,526	734
 North East (NE)	117	40
 North West (NW)	572	134
 Yorkshire (YO)	339	79
 West Midlands (WM)	496	110
 East Midlands (EM)	281	67
 East of England (EoE)	634	149
 South West (SW)	800	143
 South East (SE)	1,405	323
 Nil nights (Nil)	N/A	197

Source: International Passenger Survey by ONS, visits stated include overnight stays, not daytrips

Nights (% share) (2014-2016)

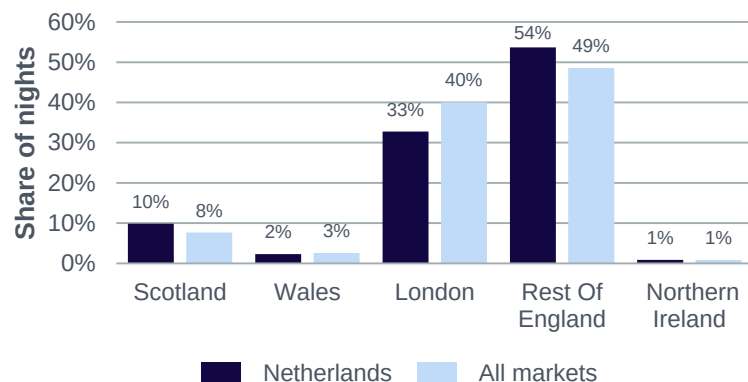


1.1 Key statistics: regional spread and top towns and cities

Top towns and cities visited (2014-2016)

Town	Average overnight visits (000s)
London	734
Edinburgh	67
Manchester	49
Birmingham	45
Glasgow	34

Regional spread 2016

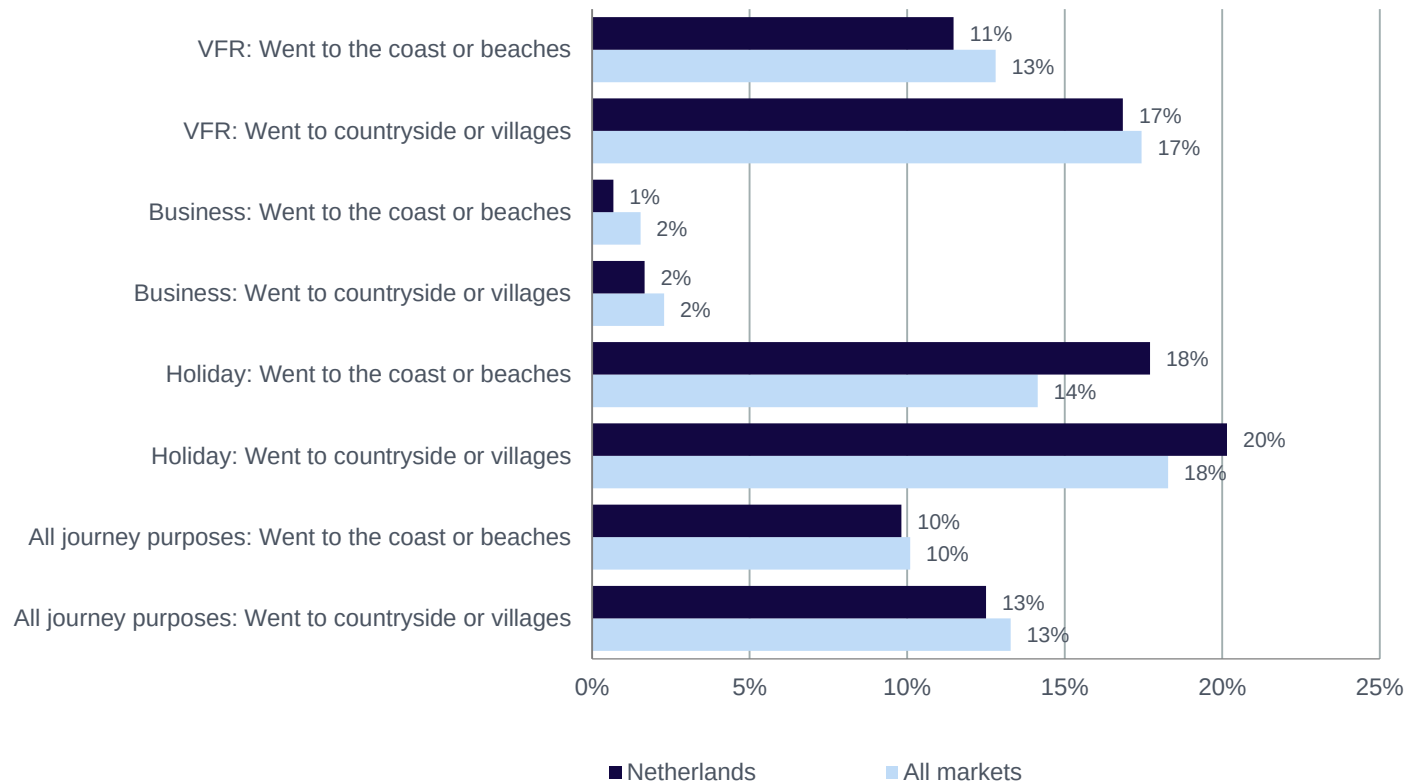


Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors

- London is the leading destination for a trip to Britain, accounting for 30% of visitor nights. The South East, Scotland and the South West are also popular (based on the average nights spent in each region in 2014-2016).
- Dutch holiday visits had an above-average propensity to feature rural and coastal areas of Britain in 2016.
- 12% of visits from the Netherlands were bought as part of a package or an all-inclusive tour in 2016, above the average in comparison to other markets. 26% of holidays and 30% of miscellaneous visits were bought in this way. Overall, 88% of Dutch visits to the UK were organised independently in 2016.
- Around 30% of visits from the Netherlands involve travellers bringing their own vehicle; this is a larger proportion than many other markets.
- The majority of Dutch visitors buy their tickets for transport in Britain whilst they are here (with the exception of internal flights and hire cars), especially transport within London such as Tube tickets and train travel tickets.

1.1 Key statistics: visits to coast, countryside and villages

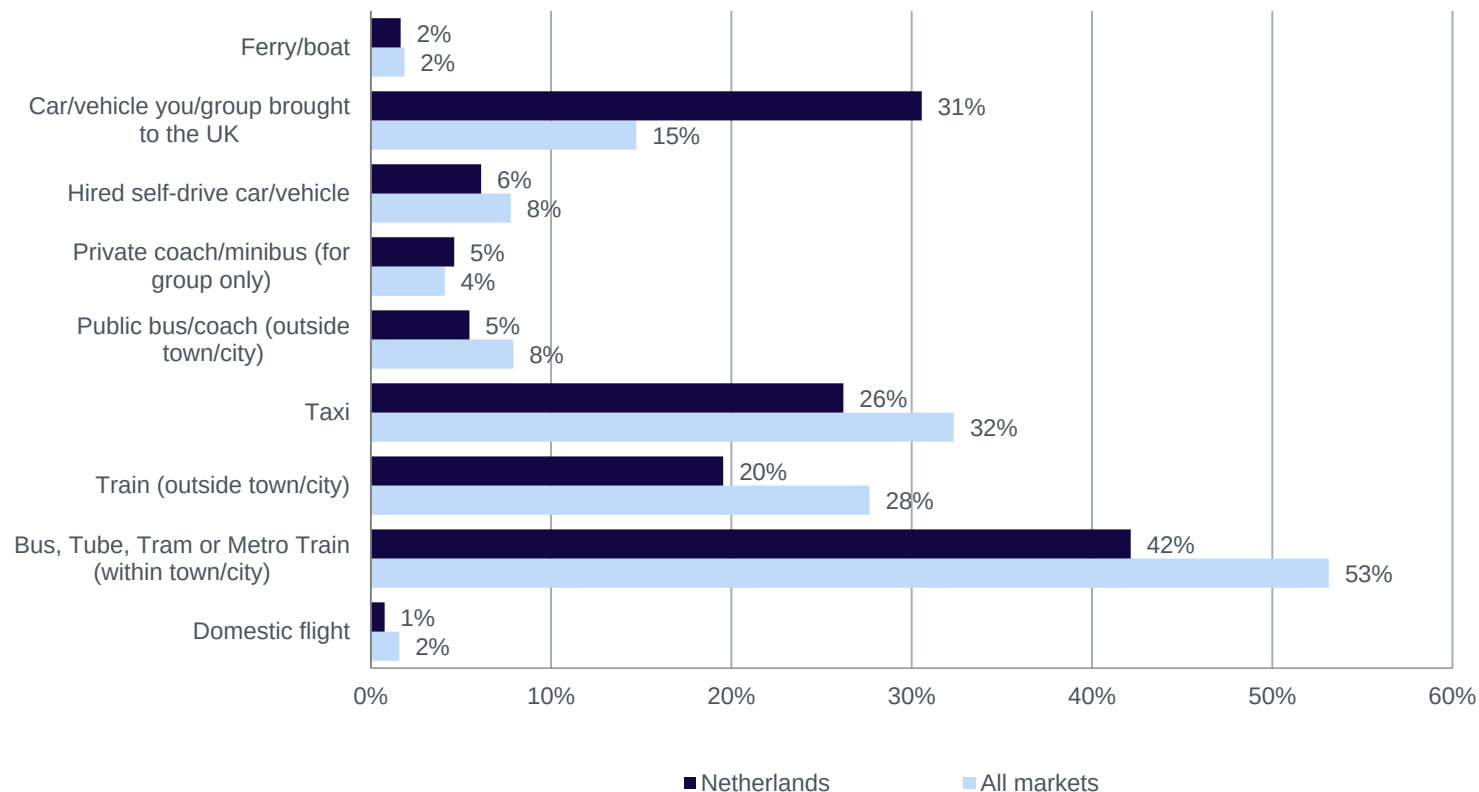
Propensity to visit coast, countryside and villages



Source: International Passenger Survey by ONS 2016

1.1 Key statistics: use of internal modes of transport

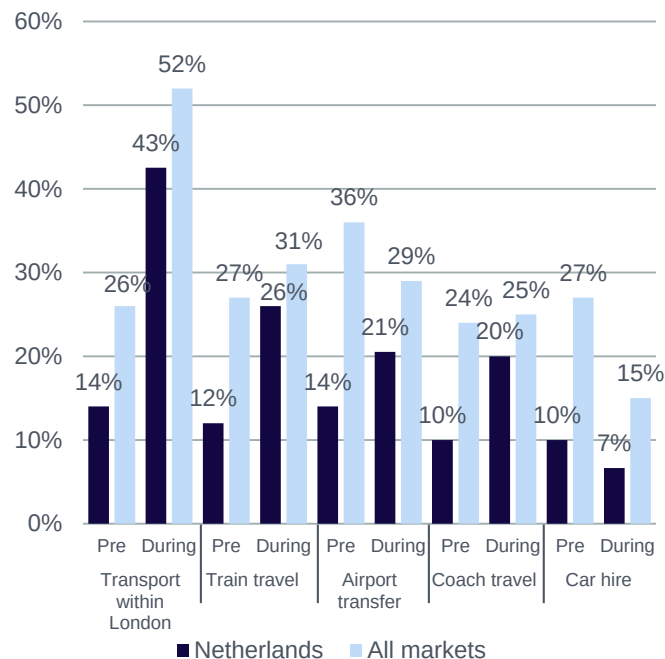
Propensity to use internal modes of transport



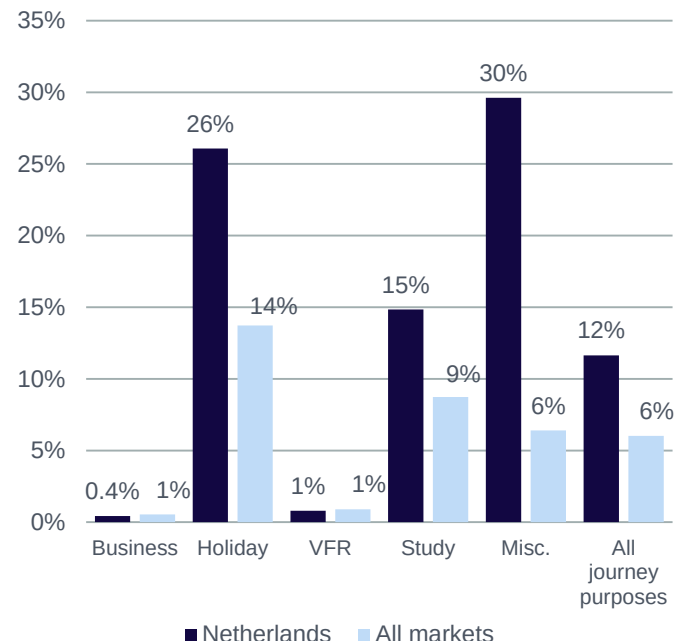
Source: International Passenger Survey by ONS, 2013

1.1 Key statistics: purchase of transport and package tours

Transport services purchased before or during trip (%)



Proportion of visits that are bought as part of a package or all-inclusive tour in 2016



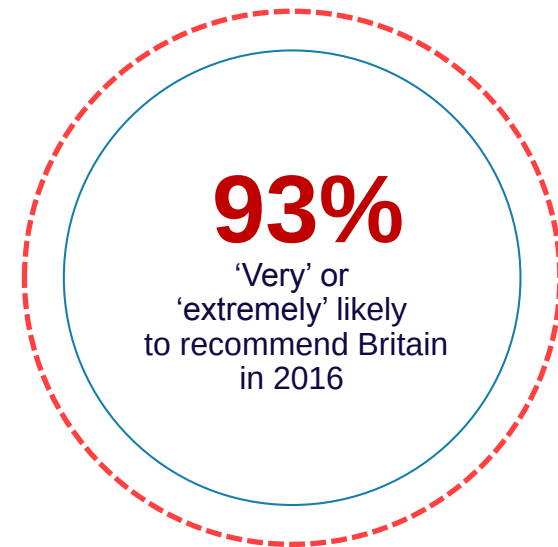
International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors



1.2 Visitor demographics

Visitor characteristics

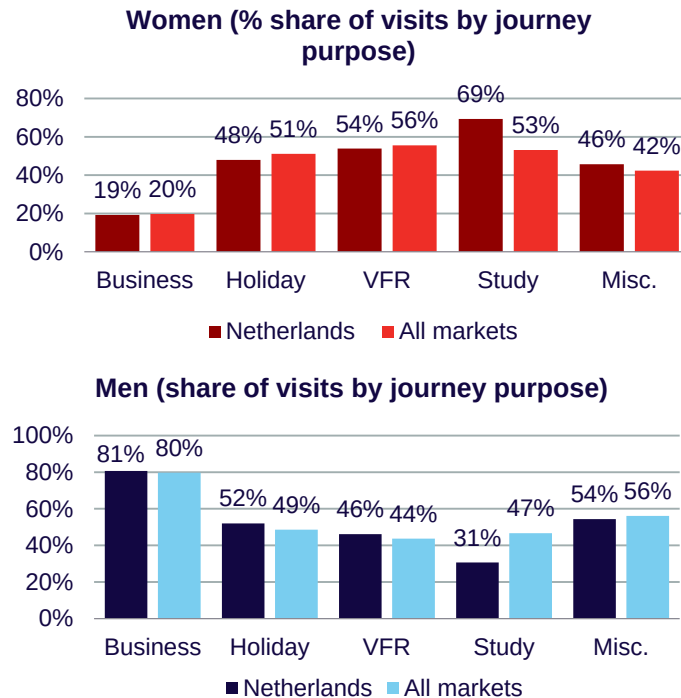
- Business visitors are more than four times as likely to be men than women.
- More than three in four holiday visitors are making a repeat visit to Britain.
- Most of visits from the Netherlands to the UK were made by Dutch nationals (85%), 7% by British nationals.
- 93% of departing Dutch travellers are either 'Very' or 'Extremely' likely to recommend Britain for a holiday or short-break.
- 88% of departing Dutch felt 'very' or 'extremely' welcome in Britain.



Source: International Passenger Survey by ONS, CAA 2016

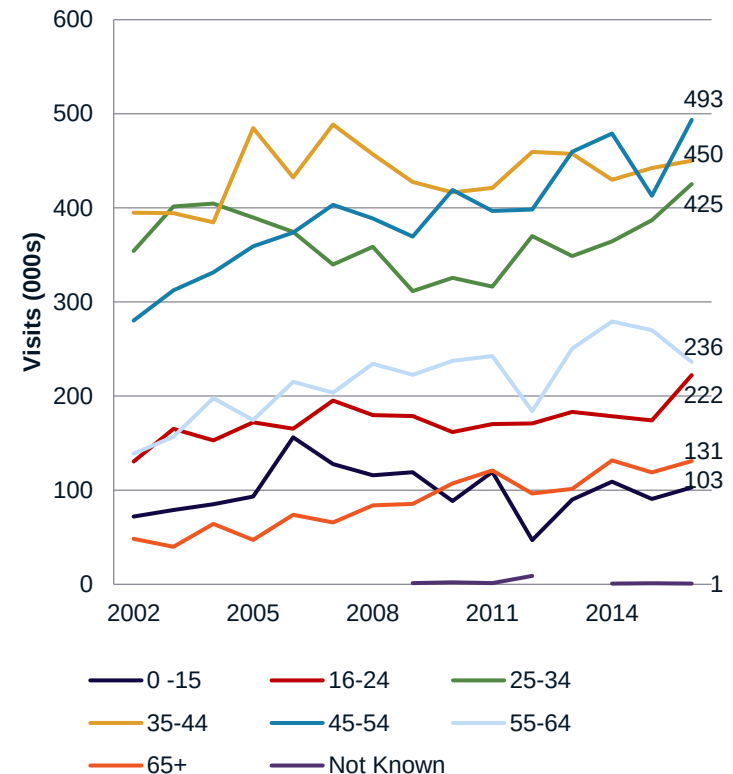
1.2 Visitor demographics: gender and age groups

Visitor demographics (2016):
gender ratio of visits from the Netherlands:
40% women, 60% men



Source: International Passenger Survey by ONS

Age group trend



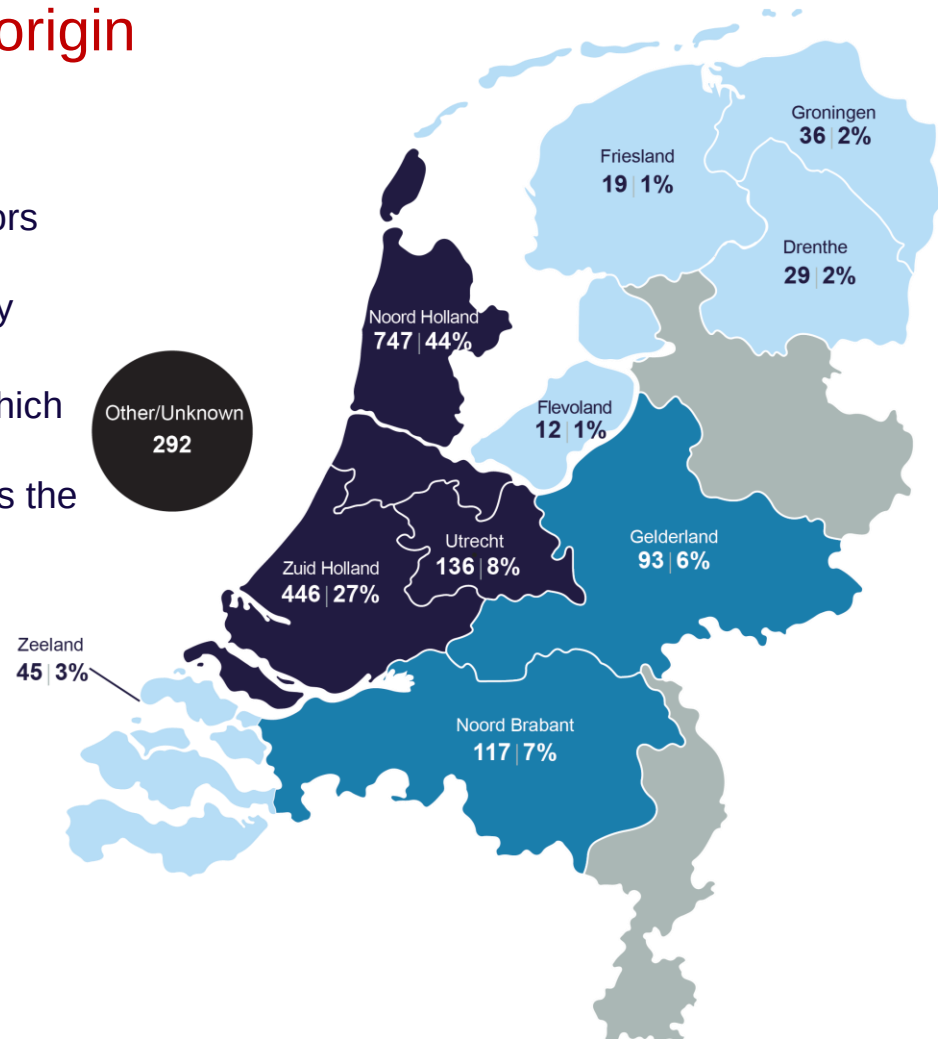
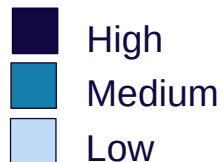


1.2 Visitor demographics: origin

Visits to the UK (000) in 2014

- The largest proportion of Dutch visitors who came to the UK reside in Noord Holland and Zuid Holland followed by Utrecht.
- The area known as the Randstad, which includes cities like Amsterdam, Rotterdam, the Hague and Utrecht, is the most densely populated area in the Netherlands.

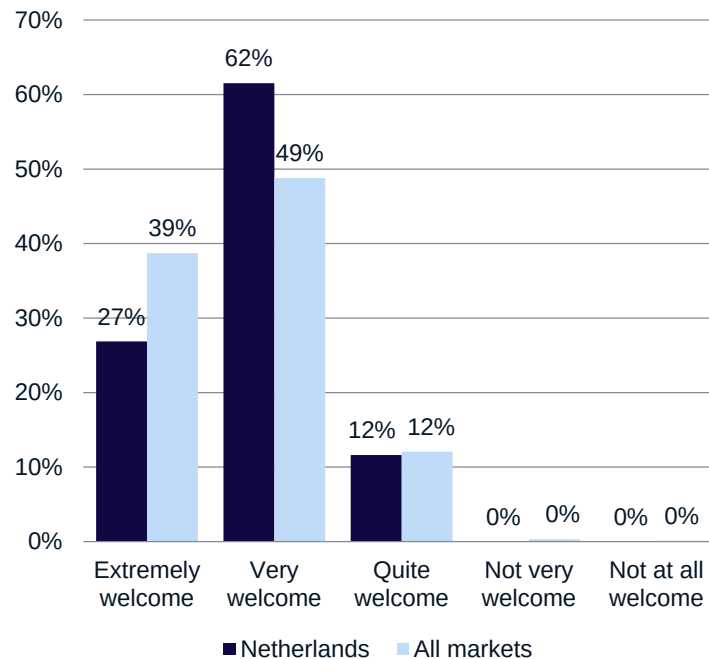
Visits in 000s | % share of visits



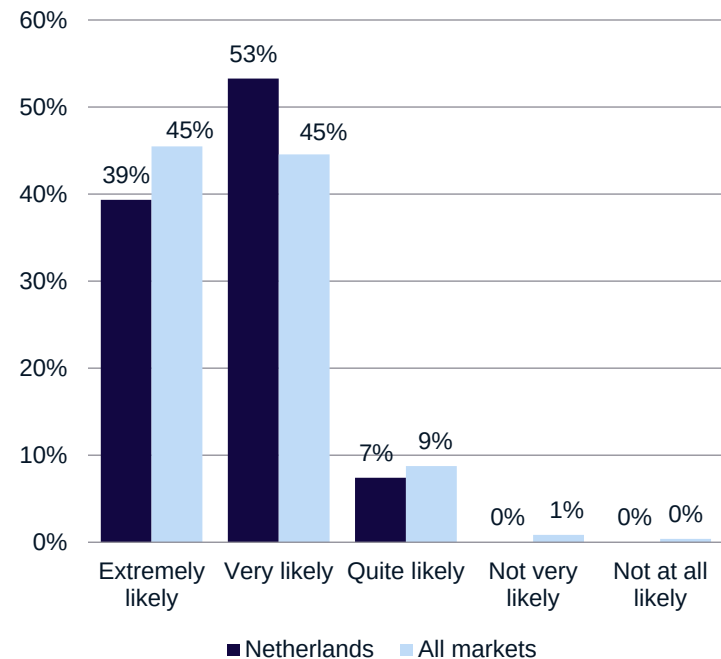
Source: International Passenger Survey by ONS, CIA World Factbook 2017

1.2 Visitor demographics: welcome and recommending Britain

Feeling of 'welcome' in Britain



Likelihood to recommend Britain



Source: CAA 2016



1.3 Britain and competitors

Market size, share and growth potential

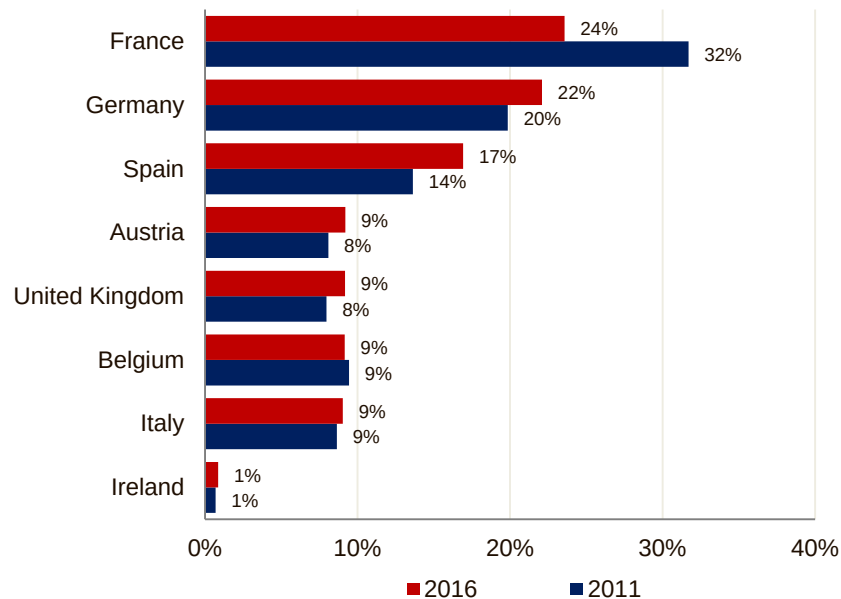
- Britain was the 5th most visited destination by Dutch travellers on overnight trips in 2016, behind France, Germany, Spain and Austria.
- Forecasts suggest there is the potential for growth in the number of visits to Britain over the next decade.
- For holiday visits, Germany, France and Spain receive the highest number of Dutch holidaymakers; Britain ranks in 7th place.
- Slightly more than half of Dutch holidays were spent abroad in 2016. The number of domestic holidays increased by 3% compared to 2015 to 17.6 million in 2016. 74% of those domestic holidays were short holidays of two to seven days. Gelderland and Limburg were the most visited provinces for a holiday in the Netherlands.



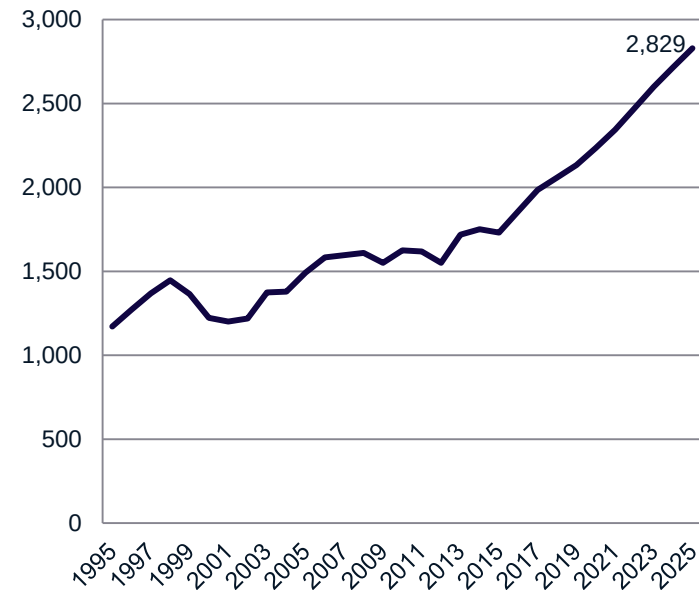
Source: NBTC-NIPO based on CVO 2016, Research Oxford Economics

1.3 Britain and competitors

Britain's market share of Dutch outbound visits among competitor set



Historic and potential visits to Britain (000s)



Source: Oxford Economics, includes visits of at least one overnight

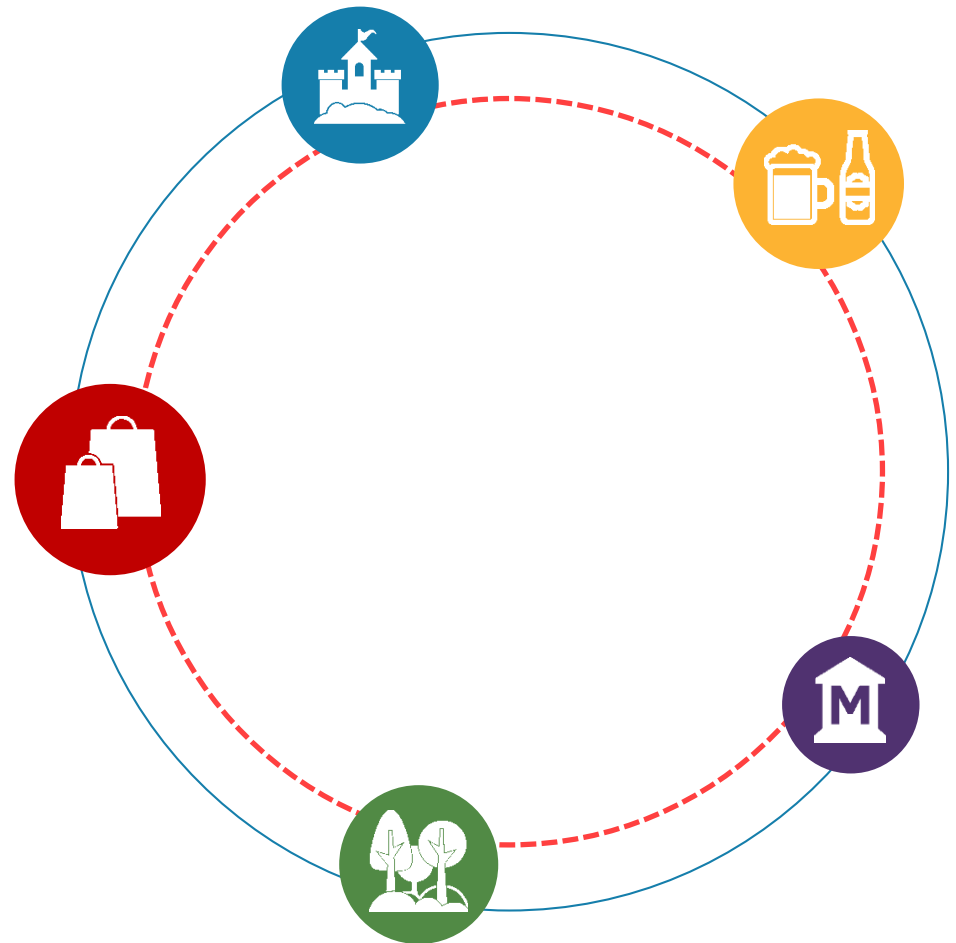


1.4 Inbound activities

Inbound Britain activities

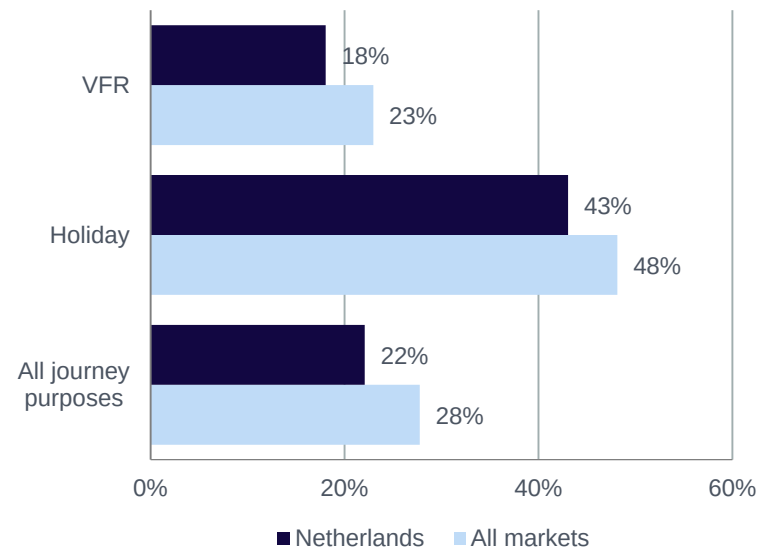
- Shopping is the number one activity which features in many Dutch visits.
- Built heritage sites, and especially museums, are important attractions for many visitors from the Netherlands.
- About half of holiday visits involve time in a park or garden, and walking in the countryside and the coast are popular with many Dutch holiday or VFR visitors.
- Most Dutch visitors like to dine in a restaurant and many visit a pub and socialise with locals while in Britain.
- More than 40,000 visits per annum feature time watching football.
- Dutch visitors have a slightly below average propensity to visit the performing arts during their stay in Britain.

Source: International Passenger Survey by ONS, rankings based on 2011 and 2016

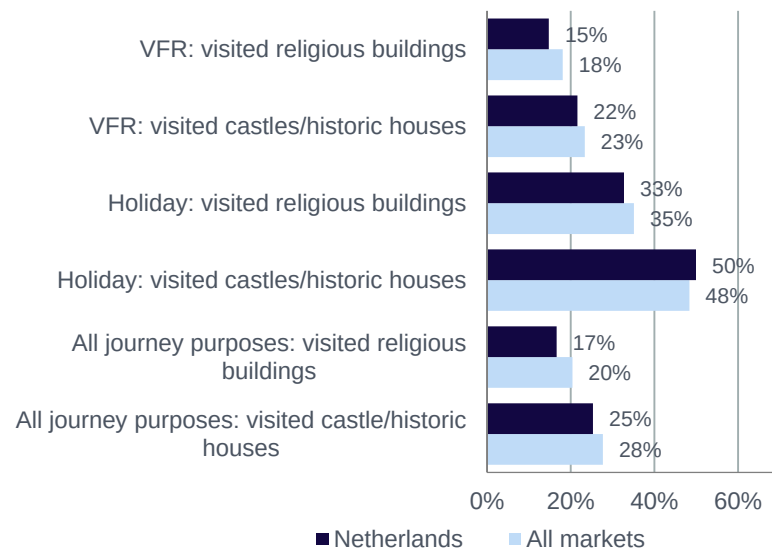


1.4 Inbound activities

Propensity to visit museums and galleries



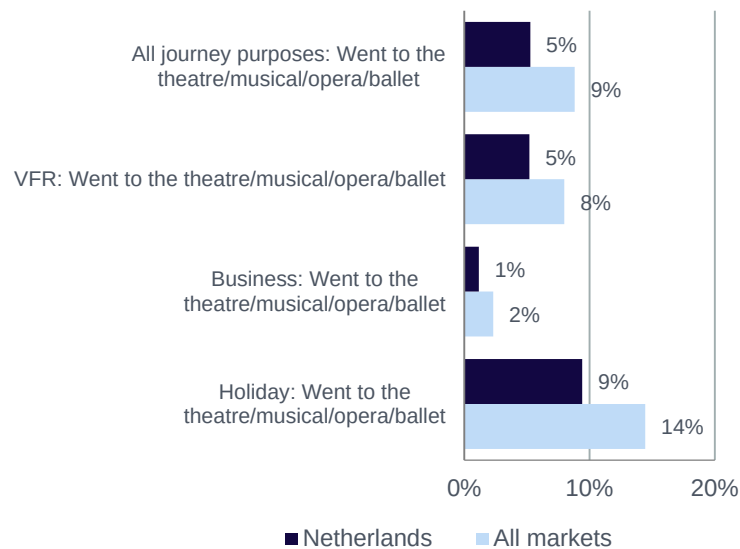
Propensity to visit built heritage sites



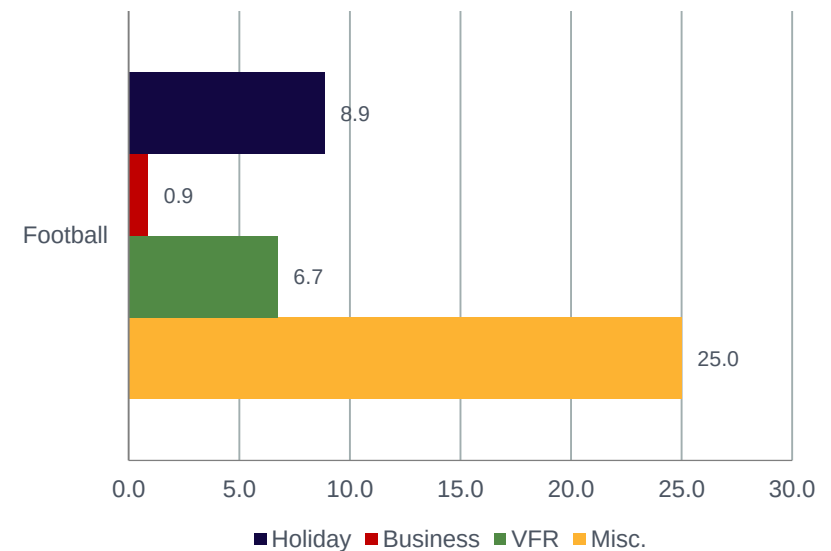
Source: International Passenger Survey by ONS 2016

1.4 Inbound activities

Propensity to attend the performing arts



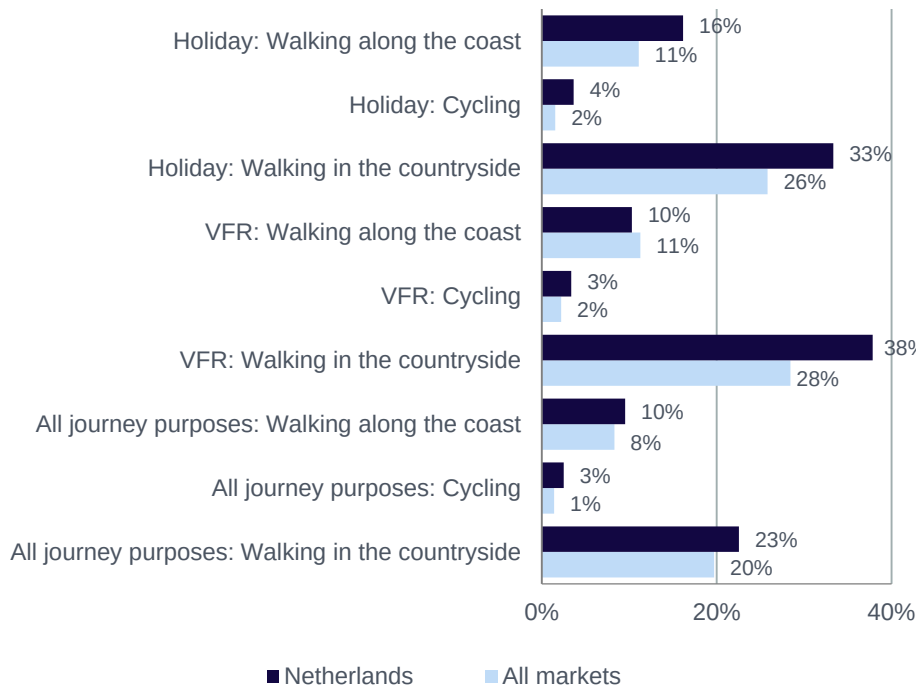
Number who went to watch live football during trip (000s)



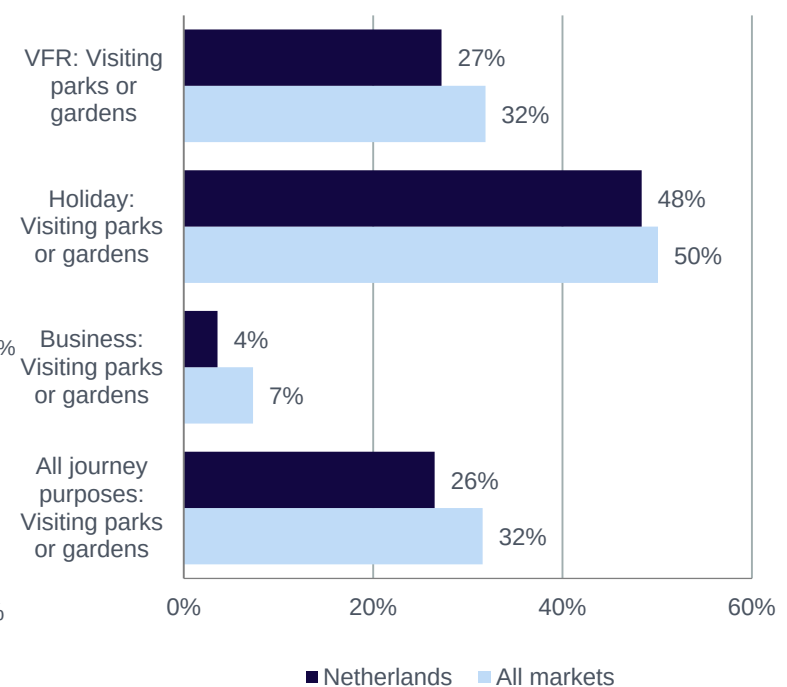
Source: International Passenger Survey by ONS 2011 and 2016

1.4 Inbound activities

Propensity to go for a walk or cycle



Propensity to visit a park or garden

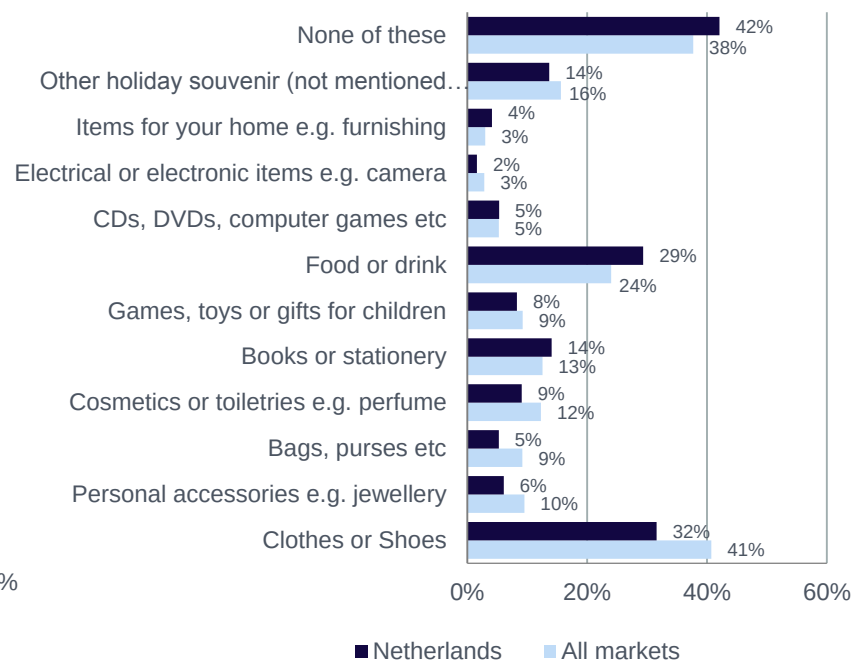
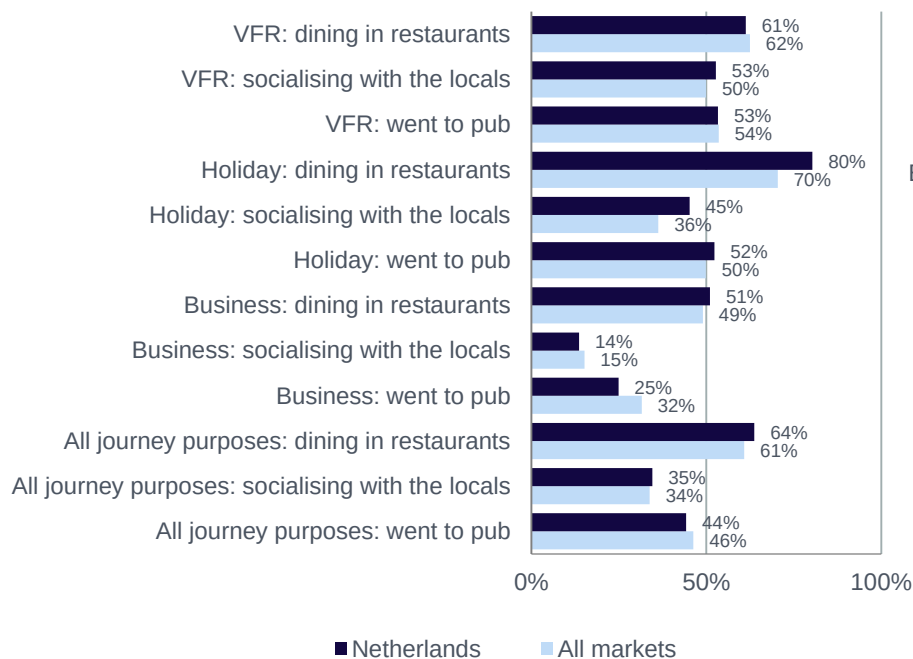


Source: International Passenger Survey by ONS 2007, 2010 and 2016

1.4 Inbound activities

Propensity to go to restaurants, pubs, night clubs and socialise with locals

Propensity to purchase selected items (%)

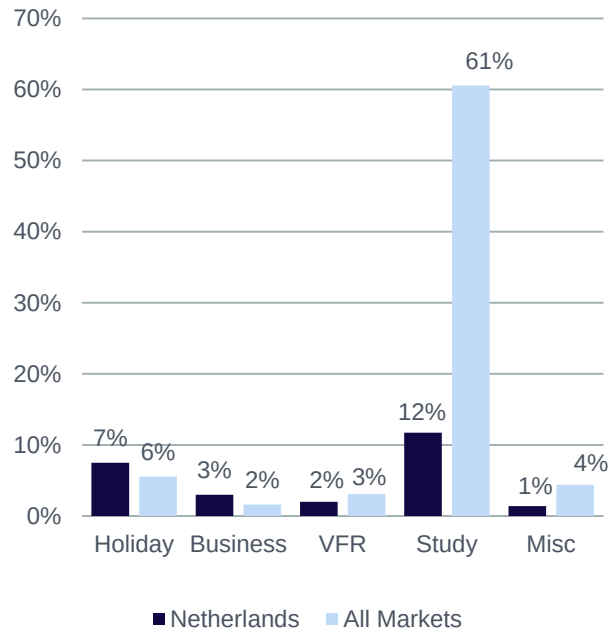


Source: International Passenger Survey by ONS 2007, 2008, 2011 and 2013



1.4 Inbound activities

Propensity for visit to include an English language course (%)



Source: International Passenger Survey by ONS 2013



Chapter 2: Understanding the market





2. Understanding the market

Chapter summary

- The Netherlands has a population of about 17 million.
- Whilst one in five Dutch did not take overnight trips away from home, it is very common for the majority to go on more than one such trip, indicating that travel is important to them.
- 32% of Dutch holiday visitors tend to start thinking about their trip to Britain early, often more than half a year in advance.
- More than half of holiday bookings of a trip to Britain were made within two months before arrival.
- Information on search engines is the most important influence on the holiday destination choice.
- Cultural attractions, vibrant cities and the countryside/natural beauty are amongst the most important motivations for choosing Britain as a holiday destination. Amongst Britain's strengths are the perceptions that it is a good destination for entertainment and nightlife, watching sporting events as well as for shopping.



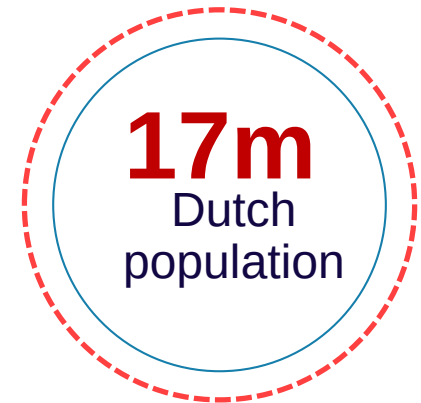
Source: Arkenford 2013, Oxford Economics, VisitBritain/IPSOS 2016, Flash Eurobarometer 432 by EC 2016



2.1 Structural drivers

Demographics & society

- Population of about 17 million.
- The Netherlands is a parliamentary constitutional monarchy.
- There are 4 regions (North, East, South and West Netherlands) which are divided into 12 provinces: Drenthe, Flevoland, Fryslan, Gelderland, Groningen, Limburg, Noord-Brabant, Noord-Holland, Overijssel, Utrecht, Zeeland, Zuid-Holland.
- An area called Randstad which comprises cities like Amsterdam, Rotterdam, the Hague and Utrecht is the area the most densely populated in the Netherlands.
- More than 90% of the population live in cities.
- The official language is Dutch; Frisian is the official language in the Fryslan province. English is taught as the first foreign language in school and linguistic proficiency among Dutch visitors tends to be high.
- Dutch full time employees receive an average of 25 days annual leave.



Source: Oxford Economics, CIA World Factbook 2017



2.1 Structural drivers: population and economic indicators

Population dynamics

Measure	2016 estimate
Total population	17,011,000
Net No. migrants per 1,000 population	1.9
Overall growth rate per annum	0.4%

Economic indicators (% growth unless stated)

Indicator	2016	2017	2018
Real GDP	2.1%	2.2%	1.9%
Consumer spending	1.5%	1.6%	1.5%
Unemployment rate	7.3%	6.1%	5.9%
Average earnings	3.1%	3.1%	3.3%
Consumer prices	0.3%	1.3%	1.4%

Source: Oxford Economics, CIA World Factbook 2017



2.1 Structural drivers: general market overview

General market conditions

- The Netherlands is Britain's 6th largest source market in terms of visits and 9th most valuable for visitor spending in 2016.
- After several years of weak growth, the Dutch economy is now growing at a steady pace. GDP growth in 2016 was 2.1% and is forecast at 2.2% in 2017. Unemployment is falling.
- The country has a population of about 17 million with a median age of 43.
- Most people in the Netherlands are well-educated and enjoy a good standard of living with GDP per capita in purchasing power parity terms of around US\$47,000, forecasted to increase in the years to come.
- According to the Capgemini World Wealth Report there were 204,000 High Net Worth Individuals (HNWI) resident in the Netherlands in 2015, these being people with investible assets worth more than \$1 million, representing an increase of 8% on 2014, one of the strongest increases out of the set of European countries included in the report. This represents the 11th largest HNWI population.

Key demographic and economic data

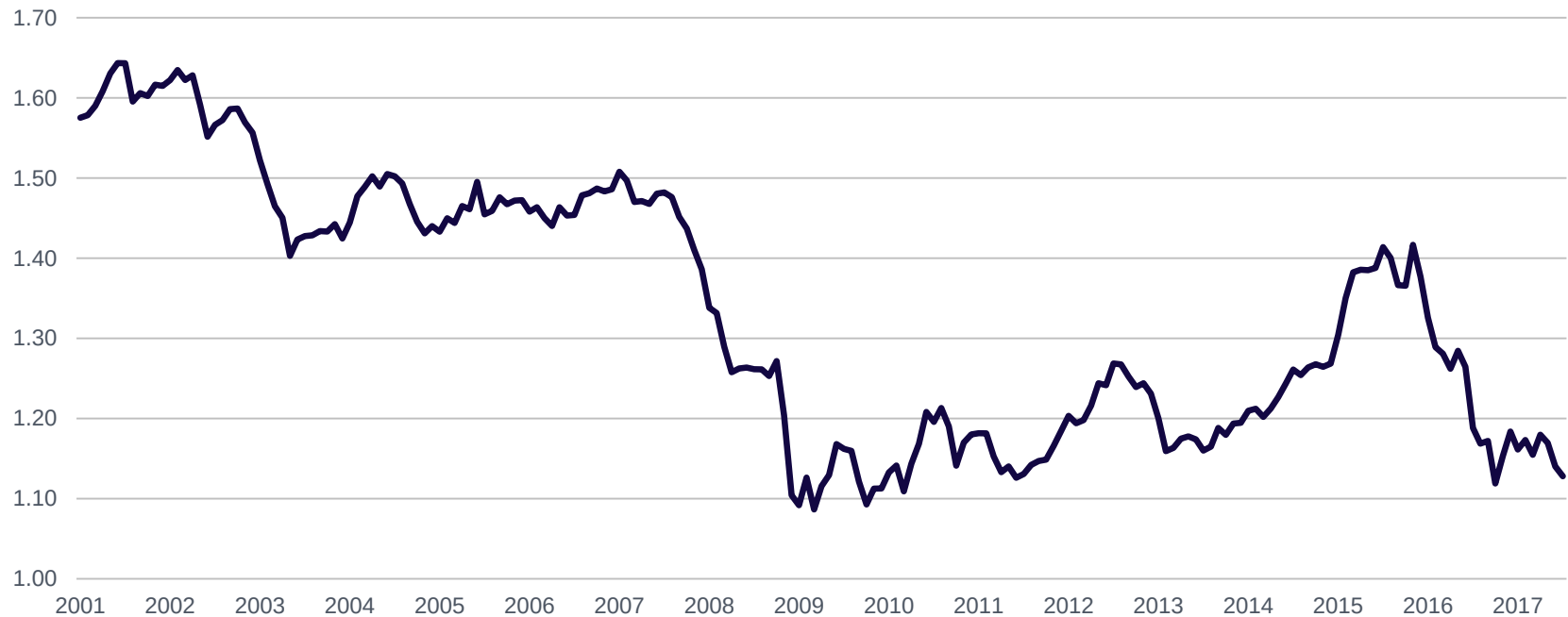
Measure (2016 data)	Netherlands	Eurozone
Population (m)	17.0	336.8
GDP per capita PPP (US\$)	46,612	38,071
Annual average GDP growth over past decade (%)	0.9	0.6
Annual average GDP growth in 2016 (%)	2.1	1.7

Source:., Oxford Economics, Capgemini World Wealth Report 2016, CIA World Factbook 2017



2.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in EUR)



Please find the most up-to-date exchange rate trend based on monthly averages at visitbritain.org/visitor-economy-facts.

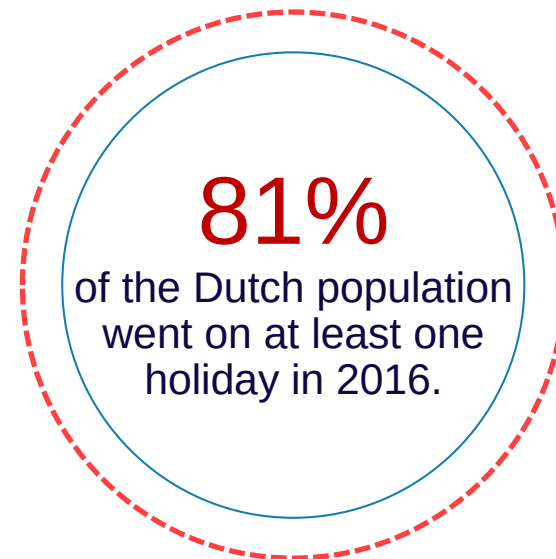
Source: Bank of England



2.2 Consumer trends

- 81% of the Dutch population took at least one holiday in 2016: a total volume of 35.5 million holidays of which just over half were outbound trips. Just over a third of those outbound trips were short holidays (2-7 days) but long holidays of 8 days or longer were more popular.
- The age group of 45-64 spend most on holidays with an average of €1,625 per year.
- Online bookings are increasingly popular: more than eight out of ten holidays abroad are currently booked online. Laptops are used by about half to book their holiday and mobile phone and tablet are also increasingly used devices to book a holiday.
- Over 4 million Dutch people book via an online travel agency. The volume of bookings via social travel sites like AirBnB and Wimdu has grown strongly in the past years, whilst travel auction sites have lost in popularity.
- The age group of 50+ also increasingly buys online (60%), but largely depends on quality reviews (50%) or positive reviews before making a purchase.

Sources: NBTC-NIPO based on CVO 2016, Thomas Cook



2.2 Consumer trends: overall travel trends

Travel trends

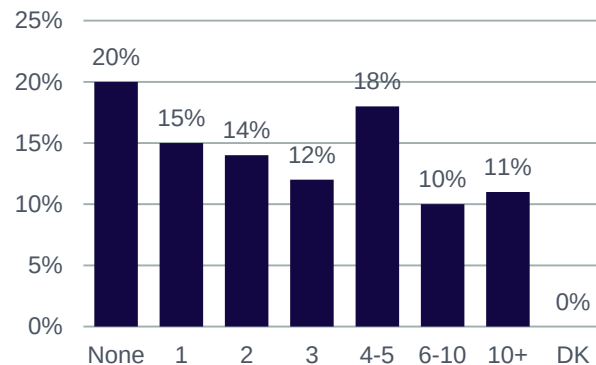
- The Dutch holiday market continues to grow. The proportion taking holidays increased for the second consecutive year: 81% of the Dutch population went on at least one holiday in 2016.
- The Dutch went on a total volume of 35.5 million holidays of which just over half (17.9m) were outbound trips in 2016 (a slight decrease from 18.1 million holidays abroad in 2015). Of the holidays abroad, just over a third were short holidays lasting between two and seven days (up 2% on 2015), but longer holidays of 8 days or more were more popular but decreased slightly compared to 2015 (2%). The number of Dutch domestic holidays increased from 17.0 million to 17.6 million (3% on 2015) with both short and long holidays gaining in volume.
- Whilst the volume of holidays taken by the Dutch increased, overall spend on holidays declined slightly (by 2%). The Dutch spent €15.7bn on their holidays with €12.6bn of this spent on holidays outside of their own country; this represents a 3% year-on-year decline, mainly due to fewer holidays taken abroad.
- The age group of 45-64 spend most on holidays with an average of €1,625 per year.
- Looking specifically at holidays, Germany and France held their position as number one and number 2 as the most popular destinations for Dutch holidaymakers. Spain experienced strong growth (11% compared to 2015) and now is the third most popular holiday destination among the Dutch, followed by Belgium, Austria, Italy and Great Britain (stable market share year-on-year of 5%) ahead of Turkey, Greece and Portugal. Overall the number of Dutch holidays in the Mediterranean and the volume of intercontinental holidays decreased 3% and 2% respectively.
- Online bookings are increasingly popular: more than eight out of ten holidays abroad are currently booked online. Laptops are used by about half to book their holiday and mobile phone and tablet are also increasingly used devices to book a holiday.
- The age group of 50+ also increasingly buys online (60%), but largely depends on quality reviews (50%) or positive reviews before making a purchase.

Source: NBTC-NIPO based on CVO 2016, Thomas Cook



2.2 Consumer trends: motivation and attitudes to holidays

Number of overnight trips away from home for all journey purposes (%)



- Whilst one in five Dutch did not take overnight trips away from home it is very common for the majority to go on more than one such trip indicating that travel is important to them.

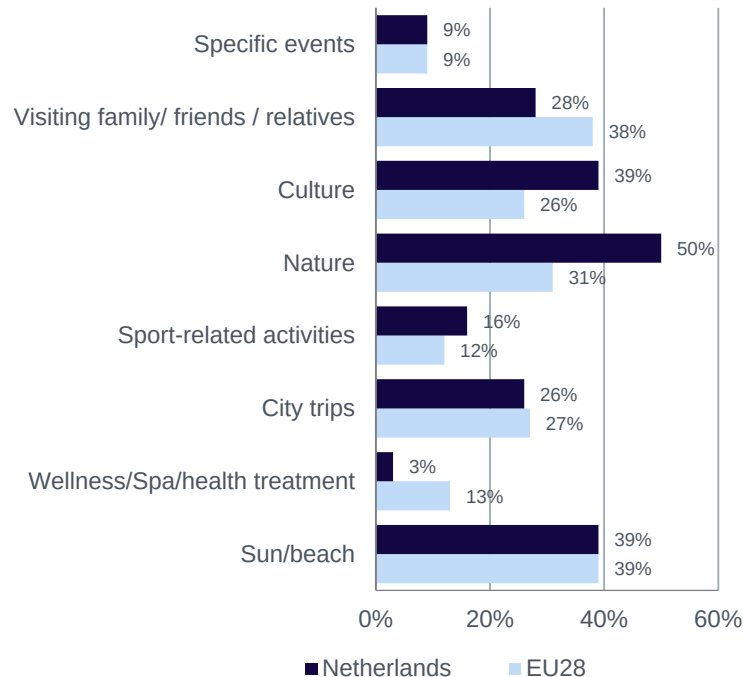
Motivation and attitudes to holidays

- The majority of Dutch said that they were unlikely to amend their holiday plans due to the economic situation (62%). Only 12% said that they go on holidays in 2016 but are likely to spend less (Flash Eurobarometer 432 by EC). This shows a lower impact than the European average.
- The Dutch tend to be very price-conscious holiday-makers who look for good value for money.
- Wi-Fi is one important criteria for accommodation bookings (82%) and children tend to have a strong influence, too.
- The Dutch, generally speaking, are interested in making contact with locals, learning about their culture and customs and in tasting local food and drink.
- Britain as well as neighbouring destinations like Belgium and Germany are mainly visited for short holidays while Spain, Italy, Austria, France and Denmark are typical destinations for longer holidays.

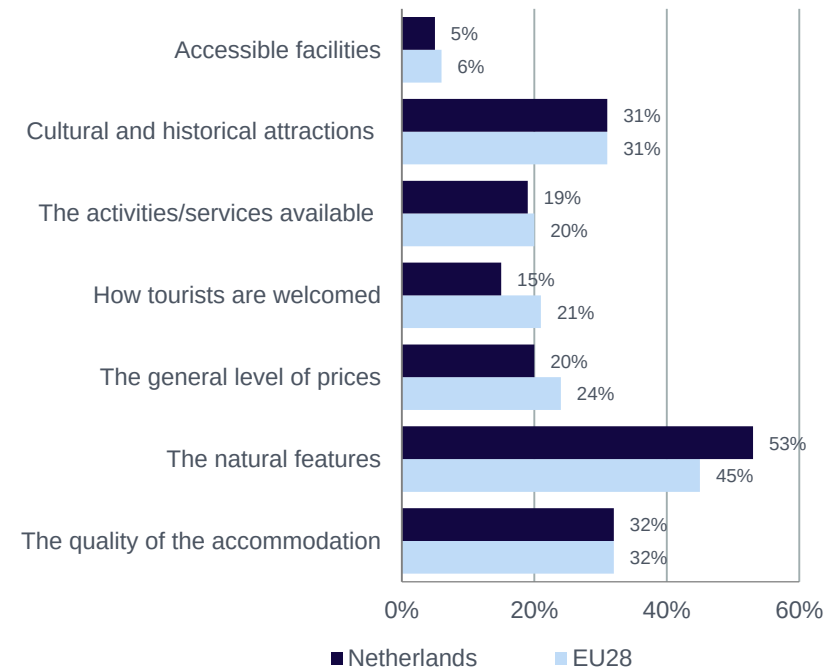
Source: Flash Eurobarometer 432 by EC 2016: During 2015, how many times did you travel for professional or personal reasons where you were away from home for a minimum of one night?, NBTC-NIPO based on CVO 2016, Thomas Cook

2.2 Consumer trends: reasons for holidays

Main reasons for going on holiday (%)



Reasons to return to the same destination for a holiday



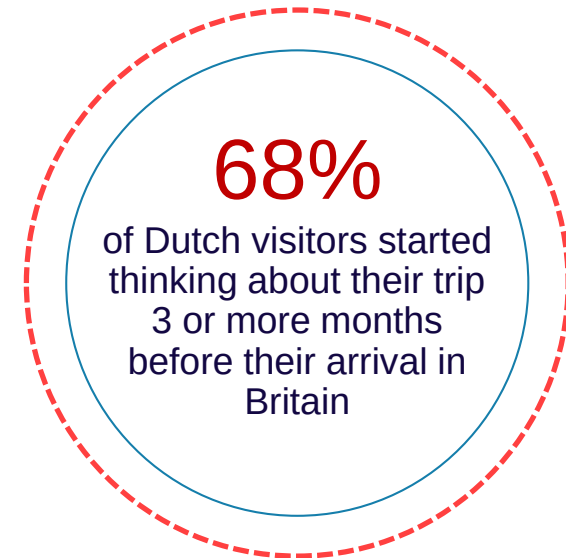
- Amongst the main reasons for going on a holiday for Dutch travellers are: nature, culture, sun/beach, visiting family/friends/relatives and city trips.
- Asked for reasons which would make them come back, the majority of the Dutch tend to value natural features. The quality of the accommodation as well as cultural and historical attributes are key for about one in three of Dutch respondents.

Source: Flash Eurobarometer 432 by EC 2016: What were your main reasons for going on holiday in 2015? Firstly? And then? and Which of the following would make you go back to the same place for a holiday? Firstly? And then?



2.3 Booking and planning

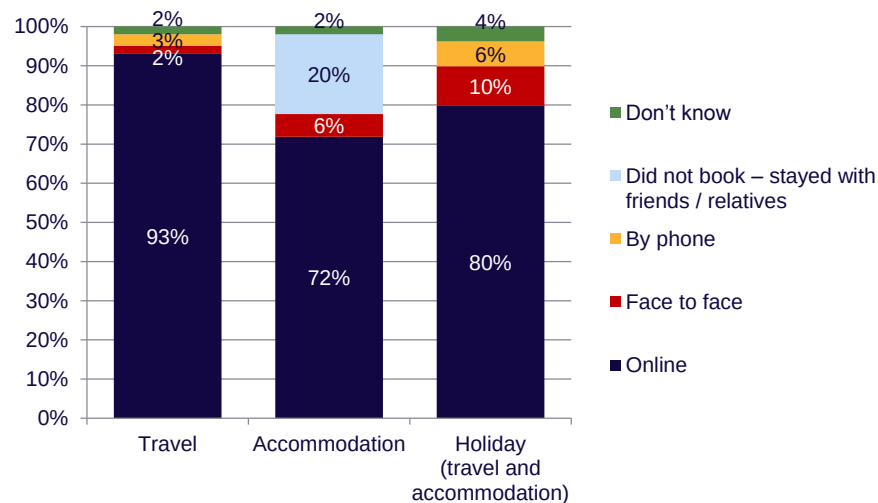
- Many Dutch holiday visitors tend to start thinking about their trip early with about one in three doing this as early as half a year or more in advance.
- 29% of bookings were made in the three to six month window before the arrival to Britain; however, more than half of Dutch bookings happened within two months before the trip.
- Most bookings to Britain were made online; however, when travel and accommodation are booked together, about one in ten visitors made the booking face-to-face.



Source: VisitBritain/IPSOS 2016

2.3 Booking and planning: booking channels and ticket sales

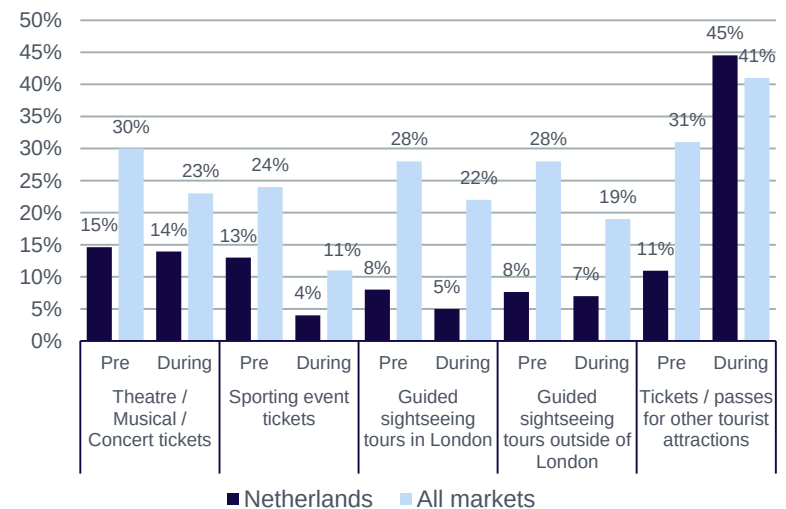
How trips to Britain were booked



- Dutch visitors have become increasingly comfortable with booking their trips to Britain online, especially when they booked travel (i.e. transport to Britain).
- One in ten bookings were made face to face when they booked a holiday arrangement (i.e. travel and accommodation combined). This compares to the global average of 26%.

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

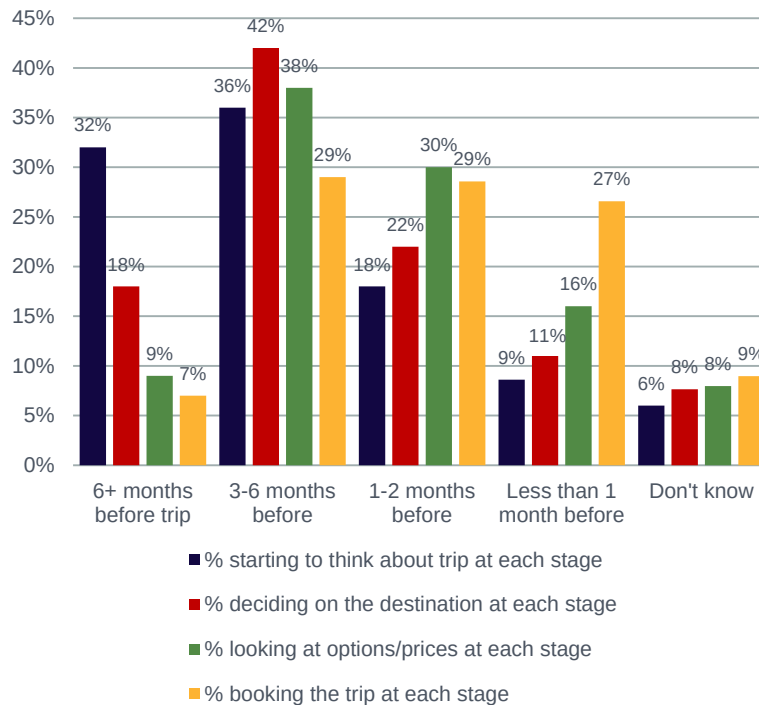
Propensity to make a purchase before or during trip



- Prior to trip: The proportion of purchases of the above items before the trip was below the all market average across all categories amongst Dutch respondents.
- During the trip: 14% of Dutch visitors purchased tickets to theatre/musical/concerts; nearly half bought tickets/passes for miscellaneous tourist attractions.

2.3 Booking and planning: lead-times

Decision lead-time for visiting Britain



Source: VisitBritain/IPSOS 2016, base: visitors, Thomas Cook

- About one in three Dutch visitors tend to start thinking early about their trip to Britain, i.e. half a year or more in advance of their journey; 36% did this three to six months in advance. The Dutch tend to spend quite some time planning and researching their trip with online sources playing a major role.
- 60% made their decision to travel to Britain at least three months prior to the actual journey (18% of these six months or earlier).
- Almost two in five Dutch visitors looked at options and prices between three and six months ahead of the trip and 29% also made the booking in the same time frame. About one in three were more spontaneous and looked at options between one and two months before the trip and 16% within one month. 27% booked their trip to Britain in the month leading up to the departure. This shows a slightly higher tendency of Dutch visitors to make their booking closer to the departure than the all market average.
- Most of the Dutch visitors who booked travel and accommodation separately booked it directly with the service provider (82% and 56% respectively). 47% of those who booked accommodation combined used a travel agent/tour operator or travel comparison website.



2.4 Reaching the consumer

- The most influential source for destination choice for Dutch visitors is information from search engines, closely followed by websites of accommodation providers/hotels and their friends, family and colleagues.
- Looking at prices of holidays/flights on price comparison websites and websites providing traveller reviews of destinations and travel agent and tour operator websites are also important for many Dutch in their destination choice. This highlights a high affinity to online sources in comparison to the all-market average.
- The Dutch spend on average 8.5 hours per day on media with TV being the most popular medium (average of 154 minutes/day). On average 2 hours per day are spent online.

**Information
from search
engines**

#1 Influence for the
destination choice
of the Dutch

Sources: VisitBritain/IPSOS 2016, SKO, Media: Tijd



2.4 Reaching the consumer: broadcast media, radio and papers



Broadcast media

- The Dutch watch TV for 153 mins on average each day. Watching TV is still most popular via a traditional TV set despite the growing popularity of mobile devices. (SKO)
- 3 public TV channels, 16 commercial TV channels.
- Travel shows on Dutch TV: 3 op Reis, Campinglife, De zomer voorbij, Erica op reis, Groeten van Max, Ik vertrek, Lekker weg in eigen land.



Radio

- 6 public and 14 commercial radio stations. (Carat factbook)
- The Dutch spend on average 2 hours and 43 mins on listening to media each day. Two hours and 8 mins (79%) are used to listen to live radio, the rest on listening to own music. (Media: tijd)
- There are no dedicated travel shows on Dutch radio. (Media: tijd)



Newspapers

- Half of the Dutch households read print versions daily. Newspaper readers spend on average 45-60 mins for reading their paper (Media: tijd)
- There are 9 national newspapers in the Netherlands. The biggest publications are Telegraaf (390.000), Algemeen Dagblad (322.000) and Volkskrant (219.000). In addition, there are 18 regional papers, many of them have local editions of the paper. (Carat factbook)
- Nearly all Dutch newspapers (90%) are owned by the Belgian publishers Persegroep and Mediahuis
- Almost all newspapers have weekly travel or lifestyle sections and/or supplements with travel content sourced internally (often the result of press visits) or produced by news agencies or freelance journalists.

Source: SKO June 2017, Carat factbook, Media: tijd



2.4 Reaching the consumer: magazines and online media



Magazines

- The Netherlands has a very extensive print media landscape with around 1,200 consumer magazines. Family, women's and culinary magazines have the highest circulation. 472 million magazines are printed each year.
- 80% of the Dutch population (11.4 million people) read magazines.
- Top Dutch travel magazines: REIZ& Magazine (circulation: 22,624), National Geographic Traveler (circulation: 37,403), Lonely Planet Traveller (circulation: 25,000) and Columbus Travel (circulation: 45,000).
- **Media trends:**
- Consumption on digital platforms increases, but print still main 'platform'.
- Many magazines are expanding their activities to e-commerce, events and video to build a strong multi-platform future.
- Web to print development where native online players launch 'old-school' print magazines.



Online media

- Nearly all Dutch print publications have an online representation. 5.9 million people visit one or more of these digital platforms of magazines once a month and 37% reaches the magazine brands through social media.
- The amount of Dutch travel blogs and vlogs has grown exponentially over the last years. Image-led content, like posts on Instagram, has the most influence on travel behaviour. (TravelNext). Most Dutch influencers share their content in English, so they have a global rather than a local reach.
- 12 million Dutch people have installed WhatsApp on their smartphones. 9.6 million of those use the messaging app daily, 11.3 million at least once a week. WhatsApp is used more than Facebook and Snapchat. The Facebook app has been installed 9.2 million times and is used daily by 77% of those downloaders. Snapchat is used daily by 2.1 million people.

Source: MMA, TravelNext



2.4 Reaching the consumer: social media on holiday

Use of social media on holiday

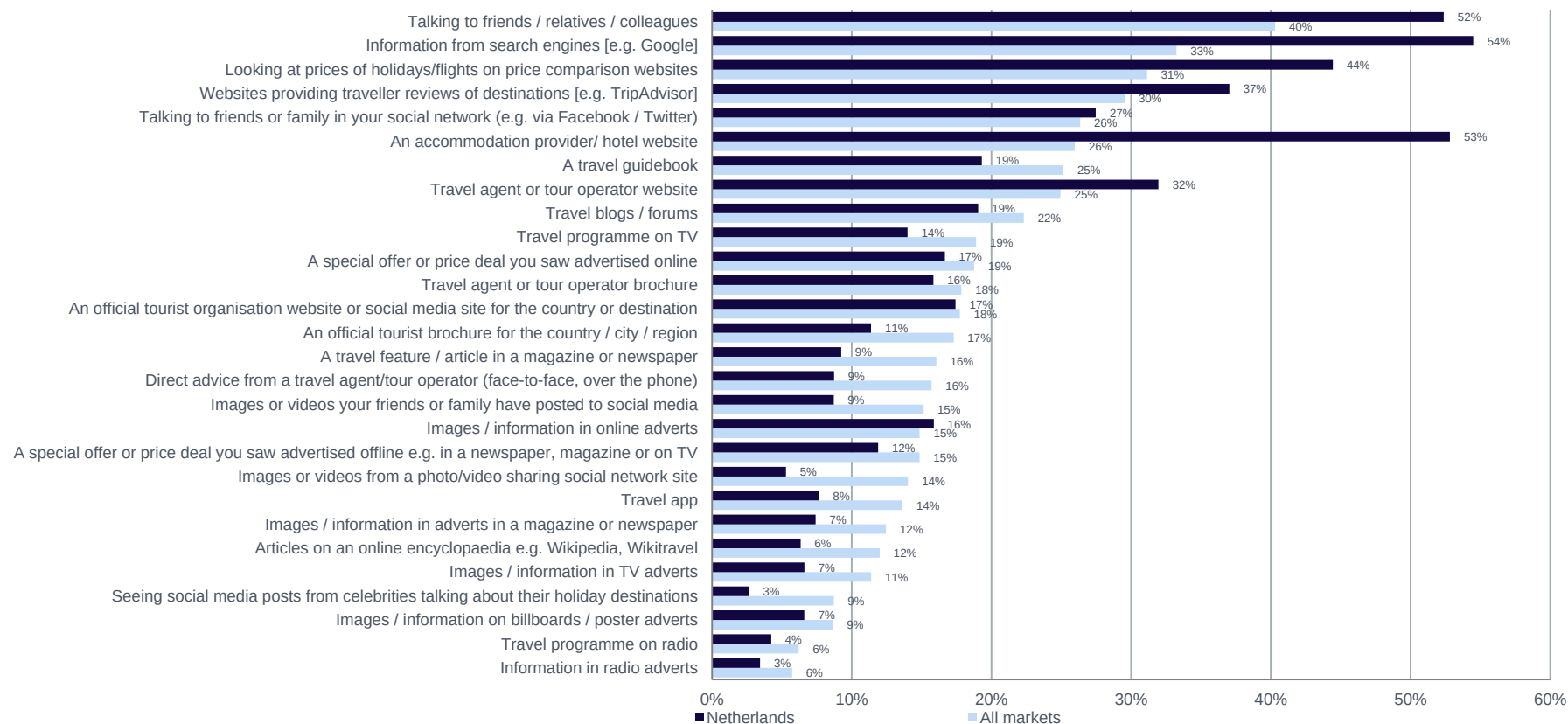


- The social media channels most used in the Dutch market are Facebook, Youtube, Google +, Twitter, Instagram and Pinterest.
- 40% like to keep in touch with people at home and 35% like to post/upload their holiday photos.
- 62% like to stay connected whilst they are on holiday and 44% regard a smartphone as essential whilst they are on holiday (compares to 73% all-market average).
- 78% of Dutch travellers love to take photos when they are on holiday which is similar to many other markets.
- 72% of Dutch travellers have shared holiday photos online or would like to do so and 54% have shared holiday video content or would like to do so. 52% of Dutch respondents have already used location technology to find places to visit and a further 25% are interested in using it. About one in five enjoy writing reviews on social media of places they have been to on holiday and two in five place trust in reviews on social media from other tourists which is below the all-market average.

Source: VisitBritain/IPSOS 2016, base: all respondents: Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)?

2.4 Reaching the consumer: influences

Influences on destination choice



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)



2.5 Perceptions of Britain

- Amongst the most important reasons for choosing Britain as a holiday destination, Dutch respondents stated cultural attractions, vibrant cities and the countryside/natural beauty followed by a good deal, visiting friends and/or relatives as well as a wide variety of places to visit and the quality and variety of the accommodation.
- Australia, USA and Italy are the destinations that the Dutch consider the 'best place' for delivering the things they most want from a holiday destination.
- Areas of strength for Britain include entertainment and nightlife, visiting places with a lot of history/historic sites, watching sporting events, soaking up the atmosphere, the ease of getting around and good shopping. Very few consider Britain as the 'best place for 'food and drink' – or to experience something new, which indicates high levels of familiarity with Britain as a destination.

Biggest draws for Dutch holiday visitors:
Cultural attractions, vibrant cities and countryside

Source: Arkenford 2013, VisitBritain/IPSOS 2016

2.5 Perceptions of Britain

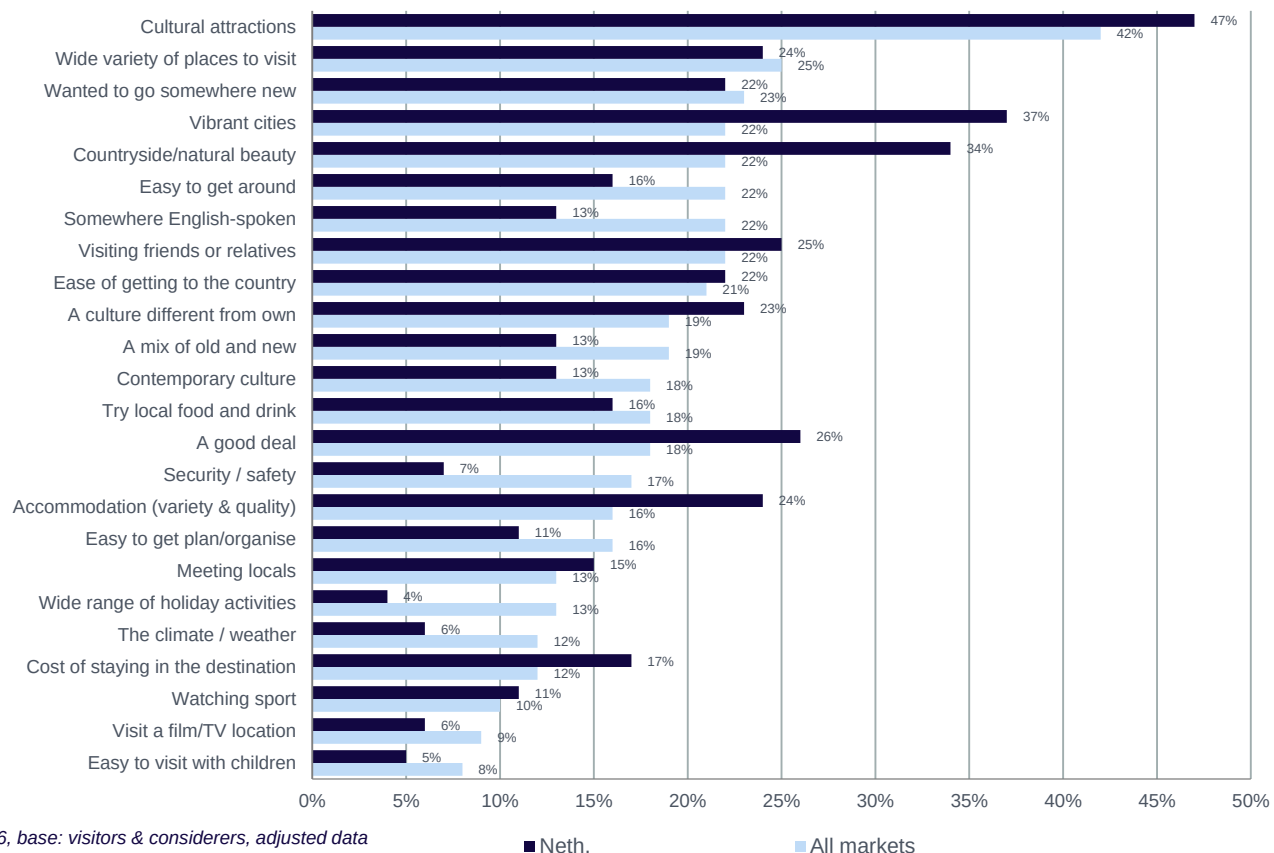
Holiday wants and % saying destination is best place for...

Importance		GB	FR	IT	AU	US	GE
5.80	Have fun and laughter	12%	10%	19%	27%	28%	10%
5.50	Offers good value for money	18%	19%	25%	28%	27%	20%
5.48	Do something the children would really enjoy	16%	23%	22%	18%	21%	21%
5.41	Enjoy peace & quiet	8%	27%	20%	34%	10%	16%
5.37	Do what I want when I want spontaneously	7%	9%	17%	35%	26%	16%
5.30	Enjoy local specialities (food and drink)	13%	40%	53%	19%	18%	17%
5.29	Have dedicated time with my other half	19%	32%	37%	33%	29%	17%
5.28	Get some sun	0%	23%	40%	51%	17%	1%
5.26	Chill/ slow down to a different pace of life	6%	24%	22%	22%	8%	10%
5.26	Explore the place	14%	13%	30%	35%	27%	6%
5.26	Enjoy the beauty of the landscape	18%	30%	29%	49%	25%	21%
5.23	Enjoy high quality food and drink (gourmet food)	19%	46%	54%	19%	11%	19%
5.22	The people are friendly and welcoming	18%	13%	22%	37%	24%	21%
5.19	Soak up the atmosphere	29%	14%	15%	34%	26%	4%
5.14	It offers unique holiday experiences	18%	19%	23%	55%	50%	15%
5.11	See world famous sites and places	27%	27%	38%	30%	52%	21%
5.09	Experience things that are new to me	6%	3%	9%	59%	39%	8%
5.01	Broaden my mind/ Stimulate my thinking	18%	20%	26%	34%	21%	12%
4.98	Be physically healthier	12%	22%	20%	25%	11%	19%
4.88	Provides a wide range of holiday experiences	20%	27%	31%	39%	42%	20%
4.86	Experience activities/places with a wow factor	18%	9%	16%	62%	61%	11%
4.85	Visit a place with a lot of history/historic sites	34%	34%	49%	10%	20%	30%
4.66	A good place to visit at any time of year	15%	20%	20%	36%	36%	17%
4.65	Feel special or spoilt	17%	21%	34%	20%	26%	21%
4.65	Feel connected to nature	24%	29%	19%	54%	22%	15%
4.47	Revisit places of nostalgic importance to me	19%	19%	9%	18%	21%	26%
4.46	Good shopping	28%	16%	30%	13%	49%	15%
4.43	Easy to get around by public transport	29%	20%	16%	17%	25%	29%
4.42	Get off the beaten track	20%	8%	13%	32%	19%	17%
4.31	Meet the locals	23%	22%	41%	40%	38%	23%
4.18	Experience adrenalin filled adventures	11%	16%	8%	51%	51%	13%
4.13	Go somewhere that provided lots of laid on entertainment/nightlife	35%	17%	20%	31%	52%	26%
4.10	To participate in an active pastime or sport	24%	28%	14%	44%	28%	32%
4.06	Party	27%	13%	35%	21%	48%	28%
3.95	Do something environmentally sustainable/ green	24%	25%	12%	48%	22%	15%
3.86	Fashionable destination	19%	44%	39%	35%	42%	18%
3.78	Visit places important to my family's history	14%	4%	14%	28%	23%	26%
3.67	Meet and have fun with other tourists	9%	24%	26%	31%	15%	22%
3.56	Watch a sporting event	31%	15%	20%	17%	25%	29%
3.31	Do something useful like volunteering to help on a project	15%	16%	51%	36%	32%	23%

Source: VisitBritain/Arkenford 2013

2.5 Perceptions of Britain

Motivations for choosing Britain as a holiday destination



Source: VisitBritain/IPSOS 2016, base: visitors & considerers, adjusted data



Chapter 3: Access and travel trade





3. Access and travel trade

- Access to Britain is easy. 63% of Dutch visits were made by plane, followed by 25% by ferry and 12% via the Channel Tunnel (currently access from the neighbouring countries France and Belgium; a direct Eurostar service from Amsterdam is planned to start from December 2017).
- Annual airline seat capacity from the Netherlands to Britain has grown more than 30% since 2011. Several airlines operate flights from the Netherlands to Britain with KLM, EasyJet and British Airways accounting for 80% of annual seat capacity in 2016.
- The excellent regional spread of Dutch visits is supported by good connectivity to a range of regional airports in the UK.
- Of all Dutch holidays abroad, 21% were booked as package holidays and 18% as self-organised holidays. The largest share of Dutch holidays was made up by 38% of tailor-made holidays, 20% used an option where transport was organised and 17% chose a traditional package holiday.

63%

of visits to Britain from
the Netherlands were
made by plane
in 2016.

Source: Apex Rdc 2016, NBTC-NIPO based on CVO 2016, International Passenger Survey by ONS

3.1 Access: key facts

- 63% of Dutch visitors travel to the United Kingdom by plane. It is a short non-stop flight: usually 1-1.5 hrs flight time.
- One in four Dutch visits came to the UK across the Channel, i.e. by ferries crossing the Channel with more than half of those who chose this mode of transport bringing a private vehicle (2016).
- 12% of visits are made via the Channel Tunnel which Dutch visitors can currently access via the neighbouring countries France and Belgium. A new direct Eurostar service connecting Amsterdam with London is planned to start in December 2017.
- Annual aircraft seat capacity from the Netherlands to the UK grew strongly in recent years.
- Dutch visitors departing Britain by air pay £13 in Air Passenger Duty.
- The regional spread of Dutch visitors is supported by the connectivity to many regional airports in the United Kingdom.
- The small annual share of some regional airports can be due to seasonal connectivity e.g. only included in the summer schedule.

◀ 63% of Dutch visitors travel to the UK by plane.

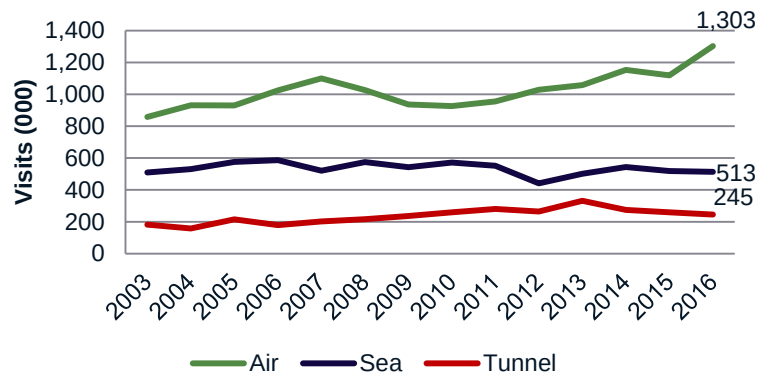
Access to Britain

Measure	2016
Weekly aircraft departures	990
Weekly aircraft seat capacity	122,270
Airports with direct routes in the Netherlands	4
Airports with direct routes in Britain	28
Weekly ferry crossings	28

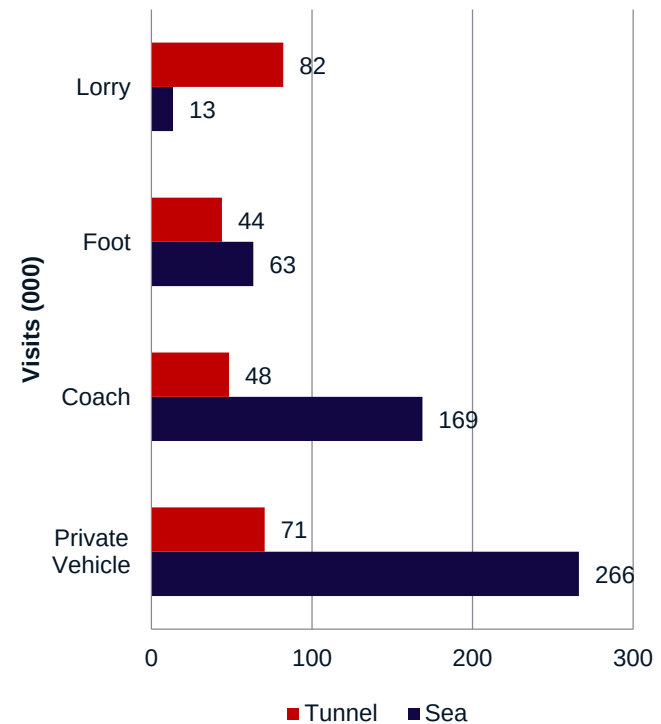
Source: International Passenger Survey by ONS, Apex RdC 2016 (non-stop flights only), Eurostar 2017, Direct Ferries 2016

3.1 Access: mode of transport

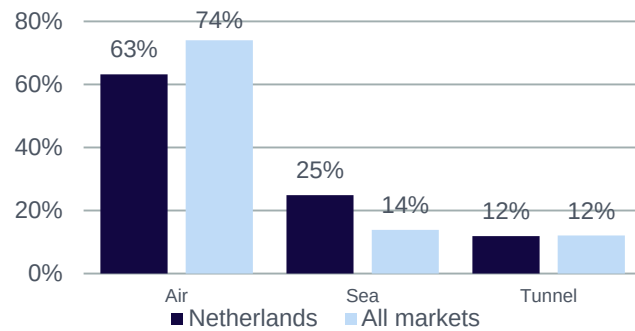
Visits by mode of transport



Sea and tunnel travel (000s) in 2016



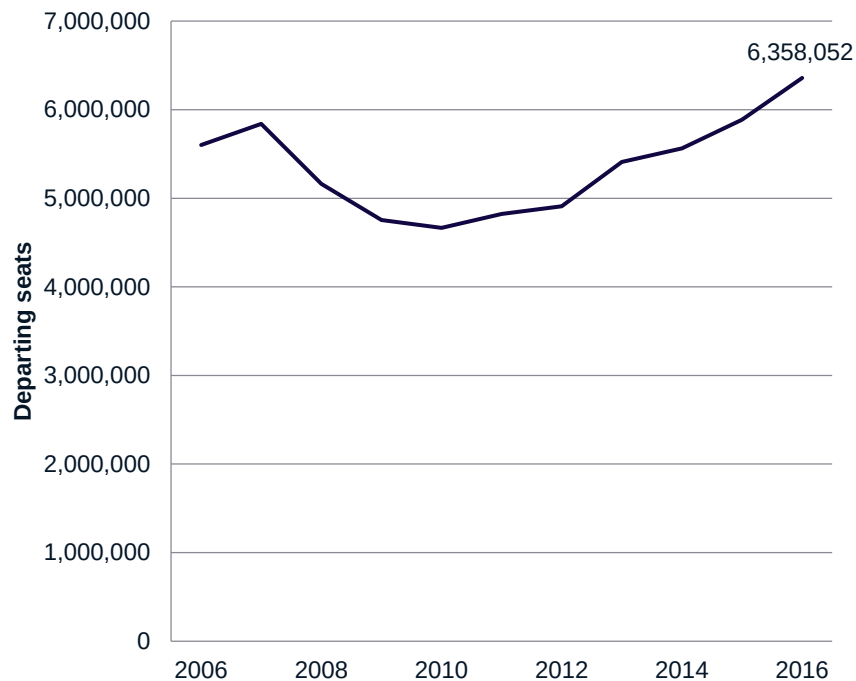
Annual share by mode (2016)



Source: International Passenger Survey by ONS

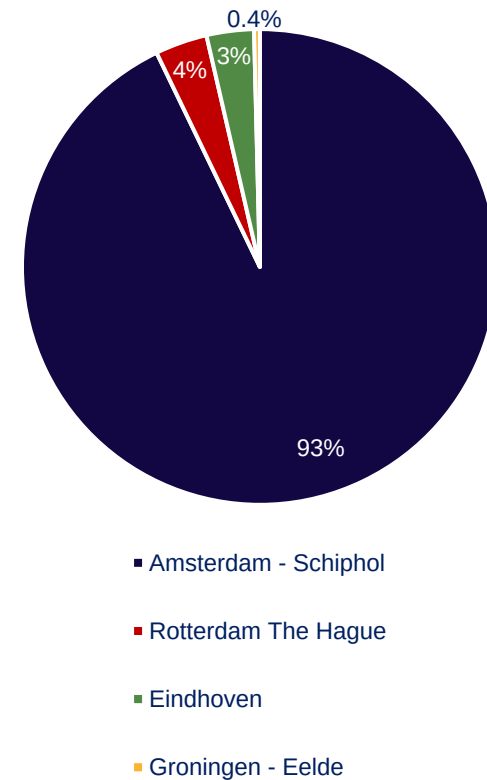
3.1 Access: capacity

Annual airline seat capacity trends



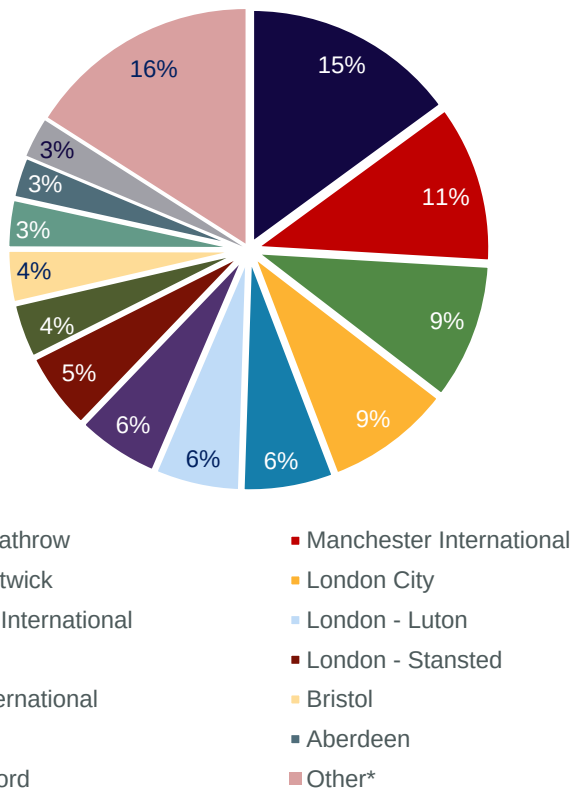
Source: Apex Rdc 2016: non-stop flights only

Origin airport annual seat capacity



3.1 Access: capacity

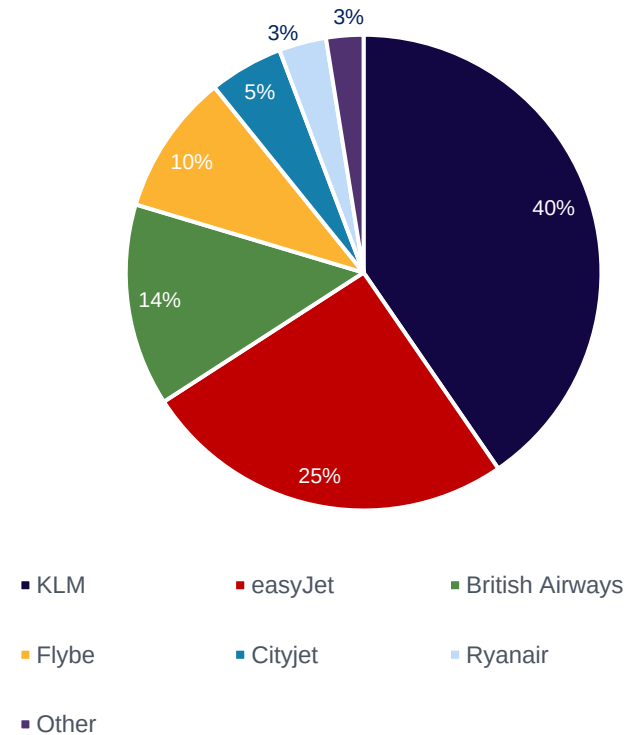
Destination airport annual seat capacity



- London - Heathrow
- Manchester International
- London - Gatwick
- London City
- Birmingham International
- London - Luton
- Edinburgh
- London - Stansted
- Glasgow International
- Bristol
- Newcastle
- Aberdeen
- Leeds/Bradford
- Other*

Source: Apex Rdc 2016: non-stop flights only

Airline seat capacity by carrier (2016)



*Airports with less than 3% annual seat share grouped in other: Liverpool John Lennon, London Southend, Southampton, Norwich, Cardiff, Humberside, Durham Tees Valley, Belfast International, Doncaster Sheffield, East Midlands, Exeter International, Belfast City, Inverness, Dundee and Bournemouth International.



3.2 Travel trade: general overview

- The Dutch travel trade is made up of tour operators, coach operators and travel agents. However, it is also made up of schools and associations that organise trips for their members/students through the travel trade. Niche operators are becoming more popular and there is a higher demand for niche holidays which requires operators to expand their current offer.
- The Dutch operators can be found all over the Netherlands but as it is a small country it might be possible to schedule several visits in one day.
- Many Dutch operators who offer Britain as a destination offer touring holidays, short breaks or city trips.
- The Dutch tour operators work both with DMCs and ground handlers but also contract packages directly.
- For Britain a range of smaller and specialist operators are also important.

Many tour operators who feature Britain offer touring holidays, short breaks and city trips.

3.2 Travel trade: Dutch tour operators

Top ten operators in the Netherlands in 2014

Top Ten Tour Operators	Turnover €m	Pax
TUI Nederland	1,115	1,542,000
Thomas Cook Nederland	420	790,000
Sundio Group	346	550,000
Corendon	345	618,000
Travelbird	334	unknown
@Leisure	246	618,000
ANWB Reizen Groep	190	235,000
Vacansoleil	98.5	unknown
De Jong Intra Vakanties	72	168,000
Alltours	68	75,000

Source: TravMagazine October 2015

Major tour operators with a Britain programme are:





3.2 Travel trade: Dutch holidays

Public and local holidays

National public holidays in 2017

Date 2017	Date 2018	National Holiday
1 January	1 January	New Year's Day
17 April	2 April	Easter Monday
27 April	27 April	King's Birthday
25 May	10 May	Ascension Day
5 June	21 May	Whit Monday
25 December	25 December	Christmas Day
26 December	26 December	Boxing Day

*Please also note that 5th December is Saint Nicolas and many offices close early. On 31st December many people tend to work a half day. Liberation Day on 5th May is a national holiday only every 5 years, the next one being in 2020.



3.2 Travel trade: practical information

General practical information:

- Business hours are usually 09:00 – 17:00 (with a 30 minute lunch break).
- When introduced expect to shake hands. Be careful of using first names until invited. Until then, please call them Mr. or Mrs.
- Check your trip does not coincide with the summer months, during this time many of your business partners will be on holidays or on contracting trips (an opportunity to potentially meet them in Britain). The Carnival period in the South of the country is also best avoided.
- Dress code: The Dutch tend to dress informally although business dress is appreciated for meetings.
- Business Meeting Etiquette: Appointments are mandatory and should be made one to two weeks in advance and reconfirm the day before. Punctuality is important. If you expect to be delayed, telephone and offer an explanation.
- Meetings are important to the Dutch. Many are familiar with doing business with foreigners as the Netherlands has a long history of international trade. The Dutch tend to appreciate a direct and forthright approach which is to the point. In general, ideas will be discussed openly at meetings.
- The Dutch tend to take a long-term perspective when looking at business, so be clear what your company's intentions are. It is also important to demonstrate how the relationship would be mutually beneficial. When coming to an agreement it is regarded as binding for both sides.
- Send potential business partners your sales documentation in advance so that they can prepare for the meeting.
- Follow up after your meeting and renew contact regularly to develop a business relationship.



3.2 Travel trade: sales calls

Sales calls

The travel trade in the Netherlands is spread all over the country. As it is small you might find that you can visit more than one trade partner in one day. Before you embark on a sales visit to the Netherlands, VisitBritain recommends that you take the following steps:

- Provide the operators you are visiting with a comprehensive information pack about your products, ideally in advance so they can prepare for the meeting.
- On your return to Britain ensure that you follow up quickly and renew contact regularly.
- The Dutch trade tends to plan 12-18 months in advance. Spring is used for contracting and visiting UK suppliers. In the fall the new programmes and brochures are produced. Generally speaking, new programmes and/or brochures are released at the end of November or the beginning of

December.

- Keep in touch with VisitBritain; let us know about your progress. Regular market intelligence is essential for our future plans and activities.
- It is also important to note that a significant number of the key Britain players attend VisitBritain's ExploreGB workshop, Best of Britain, BIM Marketplace and VisitScotland Expo. Please contact [VisitBritain London](#) for details of those attending. Some operators also visit World Travel Market but register with the organisers independently.



3.2 Travel trade: hospitality etiquette

Hospitality etiquette

If there is the opportunity it is a good idea to take your Dutch business partner out for a meal (lunch is more common than dinner as the Dutch working population tends to appreciate their private time after work) – either to build up a relationship or to thank them for business given in the past. Here are some practical tips to help you plan this:

- When choosing a restaurant please make sure to check beforehand if credit cards are accepted and bring sufficient cash if this is not the case. VISA and Mastercard are the most commonly accepted.
- Arrive on time and if possible, before the invite, as punctuality indicates reliability.
- If you order water you will be asked if you want mineral still or sparkling; the 'kraanwater' (tap water) is another common option.
- It is common practice to eat sandwiches for lunch. Generally speaking, the Dutch do not expect a business lunch to include a 3- or 4-course meal.
- Service and VAT are included in the menu price in restaurants and bars. It is still typical to 'round up' the amount to some more-or-less round figure. A rule of thumb is to add 5-10% to a full Euro amount.

3.3 Caring for the consumer

Caring for the consumer

- Dutch visitors tend to be independent and most of them speak good English.
- They often appreciate good value for money and cleanliness is very important. There tends to be an overall preference for small-scale (e.g. family-run) hotels with character and traditional decoration.
- They also tend to like self-catering accommodation like lodges, static-caravans and cottages.
- In general, there is a widespread love for camping amongst Dutch people and it is one of their most preferred types of accommodation; however, only 4% of nights spent in the UK in 2016 were spent in camping accommodation, around the same as the all-market average.
- Complaints from Dutch visitors should be resolved promptly.

Language basics

English	
Please	Alstublieft
Thank you	Dank u wel
Yes	Ja
No	Nee
Sorry! (apology)	Sorry!
Excuse me!	Neem me niet kwalijk
Sorry, I do not speak Dutch.	Sorry, ik spreek geen Nederlands.



3.3 Caring for the Consumer

Caring for the Consumer:

- The Dutch tend to be sceptical about traditional British cuisine. However, Celebrity Chefs (Jamie Oliver, Gordon Ramsey, Gary Rhodes, Rick Stein) have positively influenced perceptions.
- The Dutch appreciate value for money when they go out for dinner. British gastro pubs seem like a well-suited option for the Dutch as they enjoy the atmosphere of a traditional pub.
- Dutch guests tend to enjoy a simple breakfast in the morning and it is rare for them to prepare a cooked breakfast at home, but while visiting Britain many do enjoy a traditional full English breakfast.
- The Dutch tend to only invite people for dinner whom they are closely acquainted to. Instead, coffee has a strong social significance. Neighbours often invite each other over for a cup of coffee, and the morning coffee break at work is a true institution.
- The Dutch are also very fond of drinking tea and having a traditional afternoon-tea while in Britain is often high on the wish list.
- The debit card ('pinpas') is the most popular way of paying while on holiday to avoid cash payments.

3.3 Caring for the consumer: Dutch language tips

Language tips for arrival and departure

English	Dutch
Hello	Hallo
My name is...	Mijn naam is
Welcome to Britain	Welkom in Groot-Brittannië!
Pleased to meet you!	Aangenaam kennis te maken
How are you?	Hoe maakt u het?
Enjoy your visit!	Geniet van uw verblijf
Goodbye	Tot ziens
Did you enjoy your visit?	Heeft u van uw verblijf genoten?
Have a safe journey home!	Goede reis
Hope to see you again soon!	Hopelijk tot ziens!



3.4 Working with VisitBritain

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or hosting our journalists and broadcast crew
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Print advertising in targeted media/Britain supplements
- Retailing your product through the VisitBritain shop
- Or as a major campaign partner

We are here to support you and look forward to working with you.

To find out more browse our opportunity search (visitbritain.org/opportunities) or trade website (trade.visitbritain.com) or contact the B2B events team (Email: events@visitbritain.org) or campaign partnerships team (Email: partnerships@visitbritain.org) or trade support team (Email: tradesupport@visitbritain.org)



3.5 Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS
(visitbritain.org/latest-monthly-data
visitbritain.org/latest-quarterly-data-uk-overall
visitbritain.org/latest-quarterly-data-area)
- Inbound Tourism Trends by Market
visitbritain.org/inbound-tourism-trends
- Sector-specific research
visitbritain.org/sector-specific-research
- 2017 Inbound Tourism Forecast
visitbritain.org/forecast
- Britain's competitiveness
visitbritain.org/britains-competitiveness

We are here to support you and look forward to working with you.

To find out more about the Dutch or other inbound markets browse
our markets & segments pages or
(visitbritain.org/markets-segments)
our inbound research & insights or
(visitbritain.org/inbound-research-insights)
contact us directly
(Email: research@visitbritain.org)



3.5 Useful market-specific research resources

We have dedicated research and insights available which include:

- Planning, decision-making and booking cycle of international leisure visitors to Britain
<https://www.visitbritain.org/understanding-international-visitors>
- Technology and social media
<https://www.visitbritain.org/understanding-international-visitors>
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more
[visitbritain.org/visitor-characteristics-and-behaviour](https://www.visitbritain.org/visitor-characteristics-and-behaviour)

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To find out more about the Dutch or other inbound markets browse our markets & segments pages or ([visitbritain.org/markets-segments](https://www.visitbritain.org/markets-segments)) our inbound research & insights or ([visitbritain.org/inbound-research-insights](https://www.visitbritain.org/inbound-research-insights)) contact us directly (Email: research@visitbritain.org)

Market and Trade Profile: Netherlands