Market and Trade Profile: Netherlands

October 2021

Destination Bristol ©Gary Newman

Overview

- **'Chapter 1: Inbound market statistics'** provides insights on key statistics about Dutch travellers, where they are going, and who they are. It also takes a look at Britain as a destination and its competitive set.
- **'Chapter 2: Experiences and perceptions'** features details about what visitors from the Netherlands are likely to do in the UK, how they felt during their visit to the UK, and whether they would recommend a stay there to their acquaintances. Perceptions of Britain held by the Dutch in general are also highlighted.
- **'Chapter 3: Understanding the market'** takes a close look at consumer trends in the Netherlands, and the booking, planning and further travel behaviour of this source market. Some details on how to best reach Dutch consumers are indicated, too.
- **'Chapter 4: Access and travel trade'** shows how people from the Netherlands 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 in the appendix.

Please note that most of this report refers to the market conditions for travel from the Netherlands to the UK prior to the COVID-19 pandemic and gives some insight on changes which have resulted from the crisis. An international recovery sentiment tracking survey is available here: visitbritain.org/inbound-covid-19-sentiment-tracker.

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VisitBritain VisitEngland

Executive Summary

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1: Inbound market statistics

Chapter summary

- Despite the shorter term impact from the COVID-19 pandemic, the Dutch outbound market is forecasted to grow to almost 46.5m by 2030 for trips abroad with at least one overnight stay. In 2019, the UK was the seventh most popular destination for such trips. The value of Dutch visits to the UK is forecast to exceed £1bn from 2029.
- The Dutch rank globally in 18th place for international tourism expenditure at US$20.5bn.
- The Netherlands was the 7th largest inbound source market for the UK for volume and 10th most valuable for spend in 2019.
- Half of Dutch visitor spending came from holiday trips setting a record in 2019 and a quarter from business visits. Visitor spending of Dutch visiting friends and family also reached a new record.
- More than three in five holiday visits from the Netherlands to the UK are repeat visits (2015).
- The Dutch source market has excellent regional spread. London is the leading destination, but almost three quarters of visitor nights are spent elsewhere in the UK with the South West, South East and Scotland also popular in 2019.

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics, Oxford Economics forecasts with VisitBritain adaptations. Please note that given the current situation, prospects can change rapidly, whether for overall inbound tourism or for market-to-market prospects. Market-level inbound statistics have not been produced for full-year 2020; see p. 10 for more.

2019:
record £796m
visitor spend
in the UK

2: Experiences and perceptions

Chapter summary

- Dining in restaurants, going shopping and going to the pub are the top three most popular activities undertaken during Dutch visits in the UK overall.
- Dutch visitors also enjoy built heritage and time spent in parks or gardens. When in the UK to visit friends and relatives, half of the Dutch enjoy socialising with locals.
- The Dutch rate the UK highly for culture in general, contemporary culture, sports, vibrant cities, and cultural and built heritage.
- Music, films, museums and sports are cultural products most associated with the UK.
- Eight in ten visitors from the Netherlands felt 'Very Welcome' during their stay in the UK, in line with the inbound average. And 96% of Dutch visitors are either 'Very' or 'Extremely' likely to recommend the UK for a holiday or short-break.
- When asked for reasons to return to the UK on a holiday, visiting a different part of the country, the easy access to get to the UK, and going back to see different sights/attractions are the most stated.

Source: International Passenger Survey by ONS, Anholt-Ipsos Nation Brands Index 2019, VisitBritain/IPSOS 2016

Cultural attractions #1 motivation for visiting Britain on a holiday for the Dutch.

3: Understanding the market

Chapter summary

- 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. There is a high affinity for online sources in the market.
- In a normal year, 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 of arrival.
- The Dutch took 28.7 million holiday trips in 2020, 30% fewer than in 2019 where it had exceeded 40 million as a result of the COVID-19 pandemic.
- The third wave of VisitBritain's international recovery sentiment tracking research reveals: 83% of the Dutch considered taking an international leisure trip in the next 12 months (fieldwork 23th August – 6th September 2021), showing the strongest desire to travel since the start of the tracker. Of them, 75% are considering Europe and 10% Britain.
- More than half of the Dutch state that they will think more about sustainability and the environmental impact when planning a future holiday. The youngest age groups show the strongest intention to change their behaviour.

Source: VisitBritain/IPSOS 2016, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published October 2021, CVO NBTC-NIPO 2021 reporting on calendar year 2020

VisitBritain's COVID-sentiment research reveals:

83%

keen to travel internationally within the next 12 months.

4: Access and travel trade

Chapter summary

- Access to Britain is easy. 59% of Dutch visits were made by plane, followed by 25% by ferry and 16% via the Channel Tunnel.
- Annual seat capacity grew to 6.7 million seats in 2019, before it sharply declined by 63% in 2020 due to the COVID-19 pandemic. The effect of the pandemic was also felt severely in Channel Tunnel and sea connectivity.
- In a normal year, the excellent regional spread of Dutch visits is supported by good connectivity to a range of regional airports in the UK.
- Many Dutch operators who feature Britain as a destination offer touring holidays, short breaks or city trips.
- Dutch tour operators work both with DMCs and ground handlers but also contract packages directly.

Source: Apex, International Passenger Survey by ONS, VisitBritain Office Netherlands

The majority of visits are made via plane, but a significant proportion are made via ferry and the Channel Tunnel

VisitBritain VisitEngland

Inbound market statistics

Chapter 1

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1.1 Key statistics

Key insights

- The Netherlands was the UK's 7th largest source market in terms of visits and 10th most valuable for visitor spending in 2019.
- The UK welcomed almost 2m visits from the Netherlands in 2019, with these visitors spending a record total of £796m, up 10% on 2018. Half of Dutch visitor spending came from holiday trips setting a record in 2019 and a quarter from business visits. Visitor spending of Dutch visiting friends and family also reached a new record.
- The majority of Dutch visits are made in the summer season from July to September (30%) but more than 1 in 5 visit during each of the other quarters.
- The Dutch market offers excellent regional spread. London is the leading destination for a trip to the UK but almost three quarters of visitor nights are spent elsewhere in the UK (based on average nights 2019). Dutch visits to Scotland, the North West and the West Midlands set volume records in 2019 whilst spend records were reached in the North West and North East.
- Dutch visitors have a below-average propensity to use public transport in the UK with almost 1 in 10 bringing their own vehicle or hiring a car while in the destination.
- Just over 1 in 10 visits from the Netherlands were bought as part of a package or all-inclusive tour in 2019. Most visits from the Netherlands to the UK are organised independently.

The UK welcomed almost 2m visits from the Netherlands in 2019

Source: International Passenger Survey by ONS. Please note that market-level inbound statistics have not been produced by the ONS for full-year 2020 as the IPS was suspended from mid-March; latest full-year inbound data is for 2019. More information is available here.

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2019
International tourism expenditure (US$bn)	20.5
Global rank for international tourism expenditure	18
Number of outbound overnight visits (m)	34.2
Most visited destination	France

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10-year trend	+9%	+13%	+25%
2009	1,823	7,611	635
2010	1,723	7,787	708
2011	1,787	8,352	622
2012	1,758	7,650	634
2013	1,855	8,456	697
2014	1,989	8,304	708
2015	1,954	8,523	693
2016	1,979	8,647	685
2017	2,105	9,299	736
2018	1,978	8,566	722
2019	1,987	8,627	796
Share of UK total in 2019	**4.9%**	**3.0%**	**2.8%**

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

1.1 Key statistics: volume and value

Inbound volume and value

Measure	2019	Change vs. 2018	Rank out of UK top markets
Visits (000s)	1,987	0%	7
Nights (000s)	8,627	+1%	12
Spend (£m)	796	+10%	10

Between January and March 2020, the UK welcomed 391,000 visits from the Netherlands (down 2% on the first quarter of 2019), worth £114 million (down 2% on the first quarter of 2019). The COVID-19 pandemic already mildly impacted visitation from the Netherlands to the UK in the first quarter of 2020 as both countries introduced restrictions to counter the spread of COVID-19 in spring 2020.

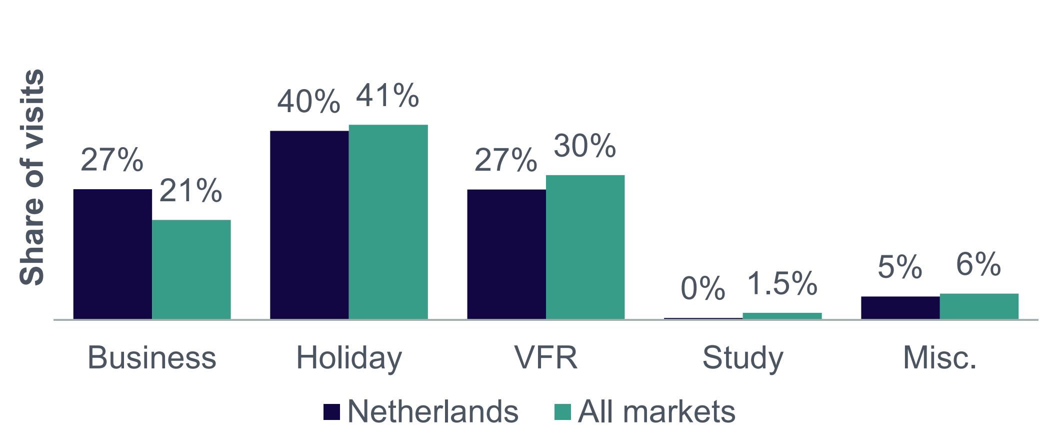
Key metrics by journey purpose

Averages by journey purpose in 2019	Nights per visit	Spend per night	Spend per visit
Holiday	5	£101	£504
Business	2	£168	£374
Visiting Friends/ Relatives	5	£48	£262
Misc.**	2	£114	£266
All visits	4	£92	£400

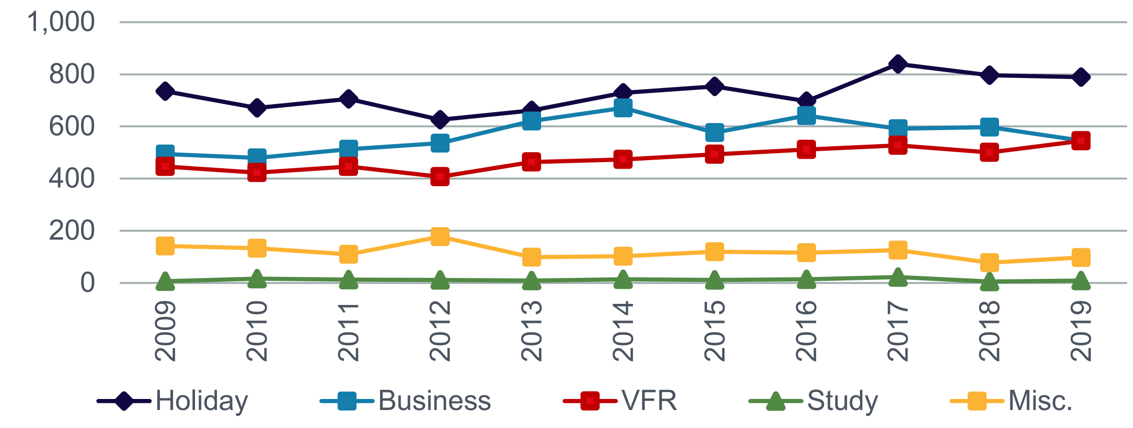
Source: International Passenger Survey by ONS, **small base

1.1 Key statistics: journey purpose

Journey purpose 2019



Journey purpose trends (visits 000s)



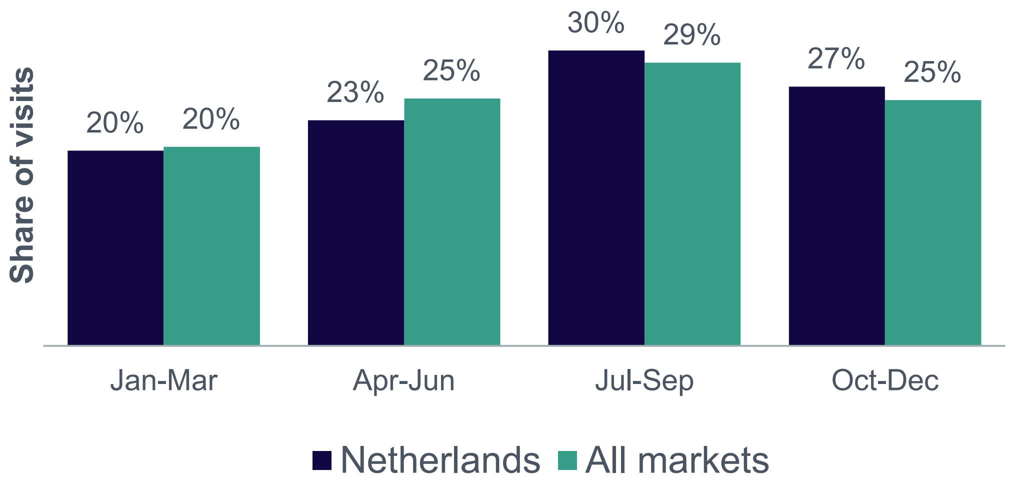
- Overall, the UK welcomed just under 2m visits from the Netherlands in 2019, on par with 2018. Visitors nights grew by 1% whilst spend was up 10% reaching a record £796m.
- 40% of all visits to the UK from the Netherlands were made for holiday purposes, followed by 27% for business visits and 27% for visits to friends and/or relatives (VFR) in 2019.
- There were 790,000 Dutch holiday visits with record spend of £398m in 2019, accounting for half of overall spend. VFR visits to the UK set records for volume and value, reaching 545,000 visits worth £142m.
- Whilst business visits were down in volume by 9% compared to 2018 to 546,000, business spend accumulated to £204m, up 7% on 2018, and the highest figure since 2016.

- On average, visitors residing in the Netherland spent £400 per visit in the UK; on holiday this rises to £504 per visit.
- Looking at the trend over the past decade, Dutch holidays reached a record 839,000 visits in 2017 but have not managed to keep up with this peak in the following two years. Business visits peaked in 2014 but have been declining since with business visits down 19% in 2019 compared to the last record. Elsewhere, VFR visits have been growing over the past decade reaching a record in 2019 (albeit with a slight dip in 2018) now making up an equal share of Dutch visits as business visits.

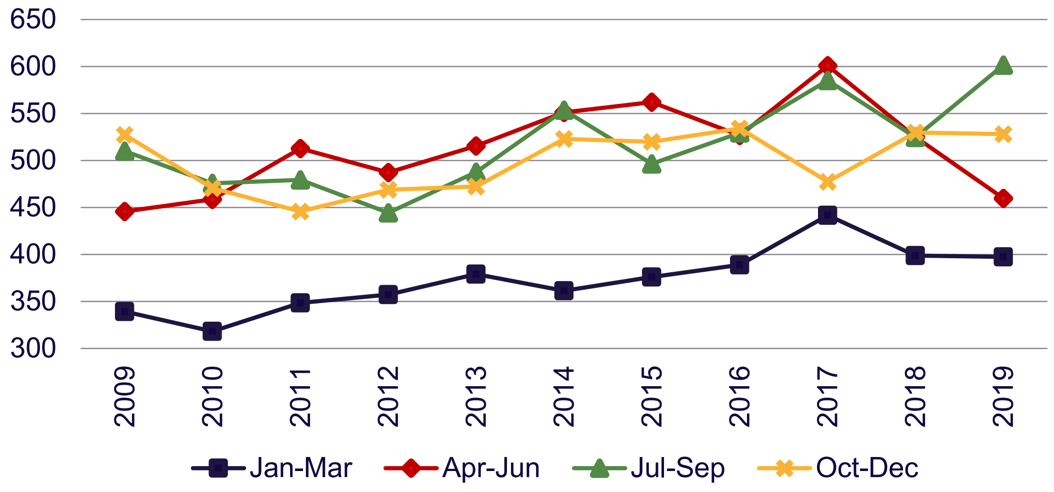
Source: International Passenger Survey by ONS

1.1 Key statistics: seasonality

Seasonality 2019



Seasonality trend (visits 000s)

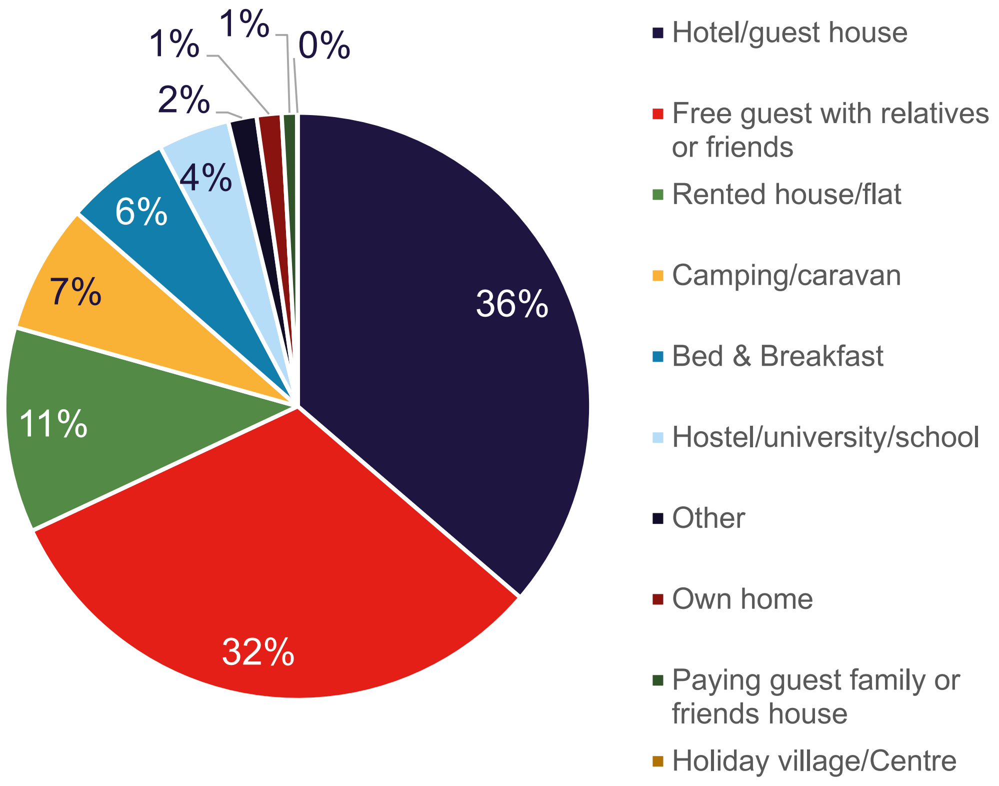


- In 2019, 30% of visits from the Netherlands to the UK were made in the summer season from Jul-Sep, followed by 27% from Oct-Dec. The first and second quarters saw round about one fifth of Dutch visits made in each.
- The volume of Dutch visits made to the UK in the first and second quarters of the year peaked in 2017, but these shares dropped in 2018 and 2019. Visits in the second half of the year have fluctuated in the past decade but the summer season of 2019 saw a record 602,000 Dutch visits worth an unprecedented £276m in visitor spend whilst the final quarter saw 528,000 visits (1% below the 2016 peak) with £212m spend, the highest spend since the 2010 record of £220m.

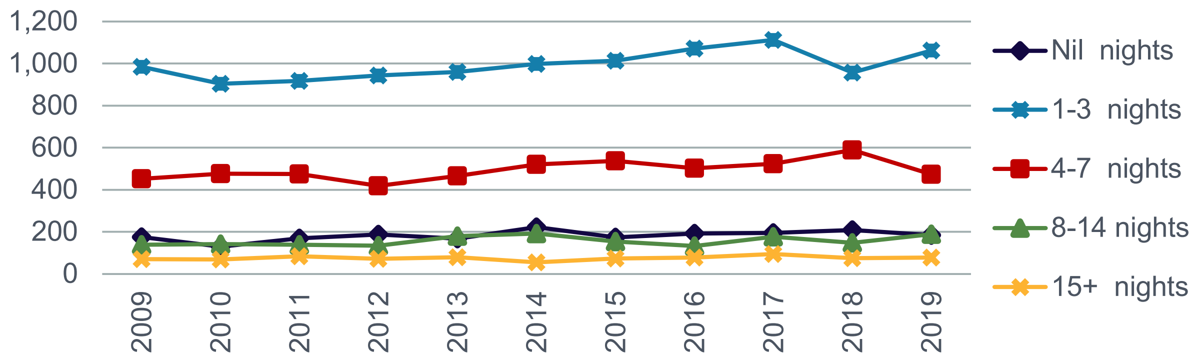
Source: International Passenger Survey by ONS

1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, in 2019 (nights, %share)



Duration of stay trend (visits 000s)

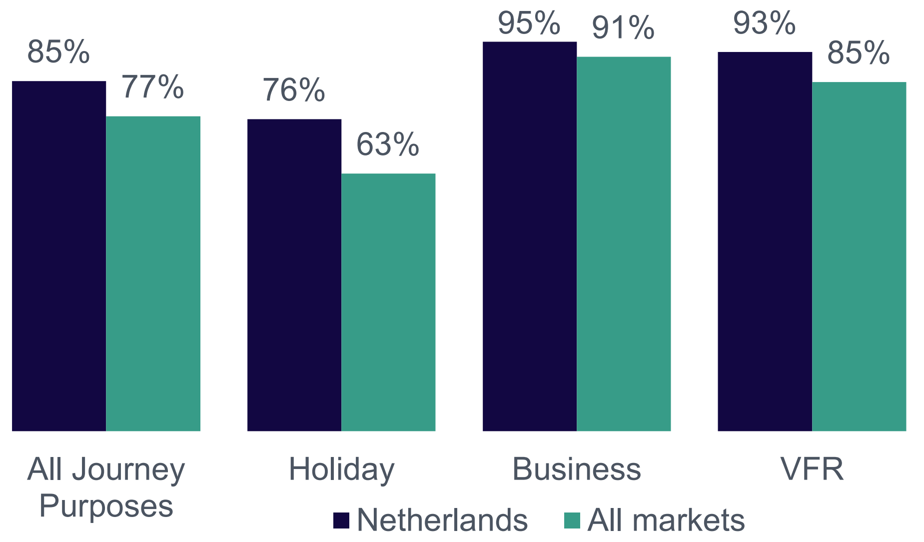


- Short trips of 1-3 nights and 4-7 nights are the most popular duration of stay amongst Dutch visitors. Over the past decade trips of 8-14 nights have shown the strongest growth, up 36% in this timeframe. Trips lasting 1-3 nights peaked in 2017 with 2019 figures just 5% below, but these visits set a new spend record worth £337m in 2019 (42% of total spend). Stays of 4-7 nights had been growing steadily accounting for a record 589,000 visits in 2018; however, they dropped by 20% in 2019. Stays of 15+ nights have grown 10% in the last decade.
- Two forms of accommodation dominate the picture with about 68% of Dutch visitor nights spent either staying at a hotel/guest house or as a free guest with family or friends. Rented houses/flats, camping/caravan, B&Bs, and hostels/university/school accommodation, are also popular.

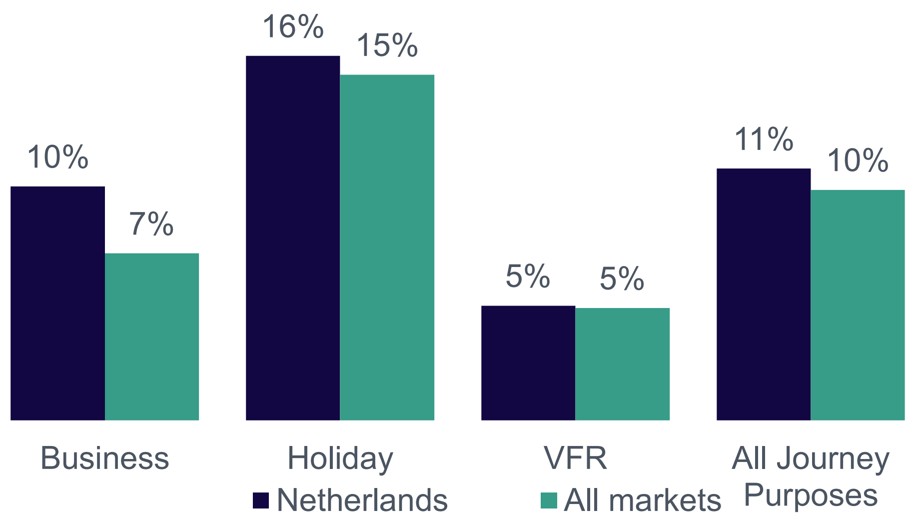
Source: International Passenger Survey by ONS

1.1 Key statistics: repeat visits and package tours

Proportion of overnight holiday visitors to the UK who have been to the UK before*



Proportion of visits that are bought as part of a package or all-inclusive tour in 2019**



- 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 seven times (a high average visit frequency compared to other markets) and spent on average £2,977 in the UK over the past ten years.
- 95% of those coming to the UK for business visits (excl. expats) had been to the UK before, followed by those coming to visit friends or relatives who live in the UK (93%).
- Just over 1 in 10 visits from the Netherlands were bought as part of a package or all-inclusive tour in 2019. Business visitors, Holidaymakers and those that visited for misc. purposes from the Netherlands were more likely to do so compared to the all market average.

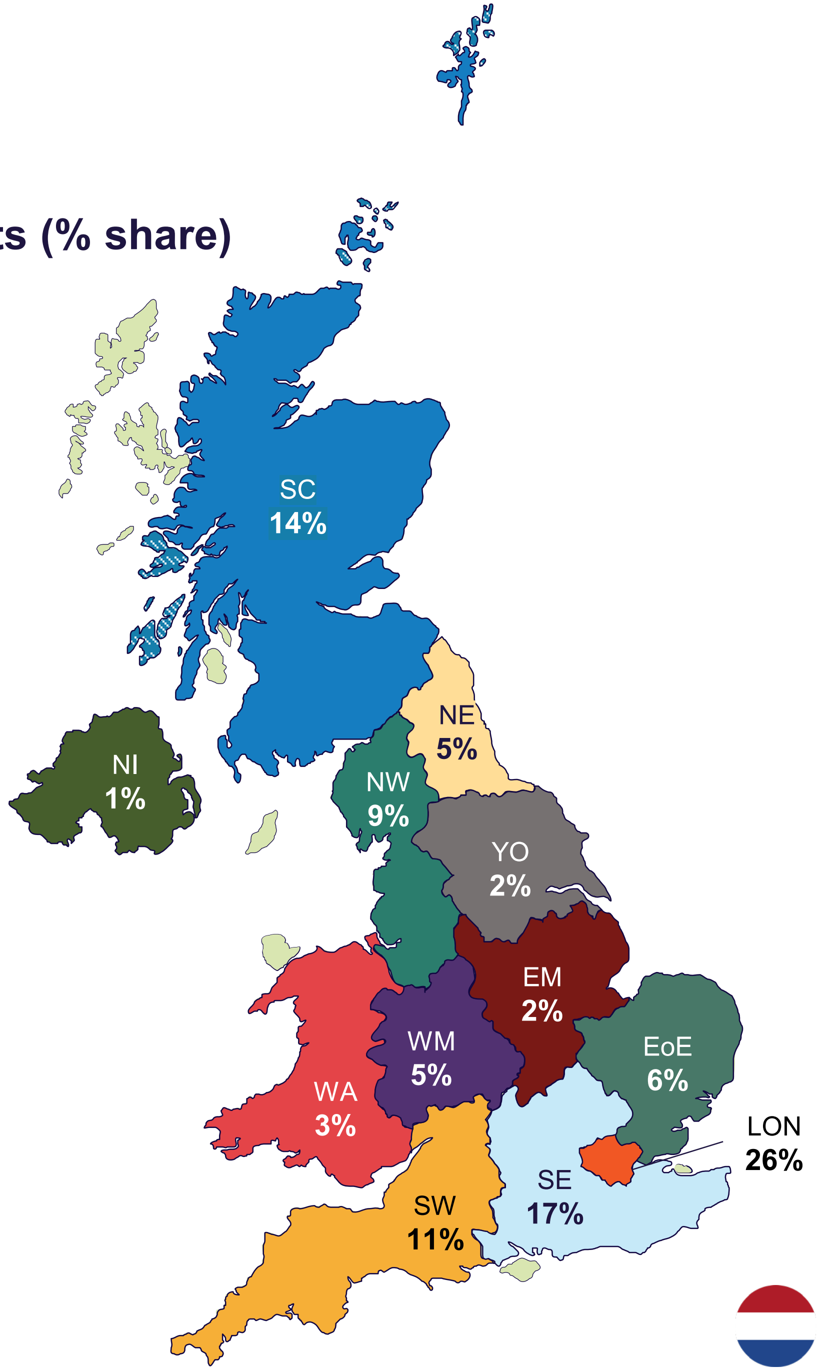
International Passenger Survey by ONS. *2015, excluding British nationals; **See definition of a package holiday in appendix; base for misc. visits is small

1.2 Getting around Britain

Annual visits to the UK (2019)

Region	Nights stayed (000)	Visits (000)	Spend (£m)
Total	8,627	1,987	796
Scotland (SC)	1,210	182	95
Wales (WA)	268	63	15
Northern Ireland (NI)	83	22	12
London (LDN)	2,248	712	314
North East (NE)	391	35	19
North West (NW)	807	156	83
Yorkshire (YO)	189	57	14
West Midlands (WM)	408	133	36
East Midlands (EM)	198	47	12
East of England (EoE)	491	127	26
South West (SW)	952	157	60
South East (SE)	1,491	321	95
Nil nights (Nil)	-	185	14

Nights (% share)



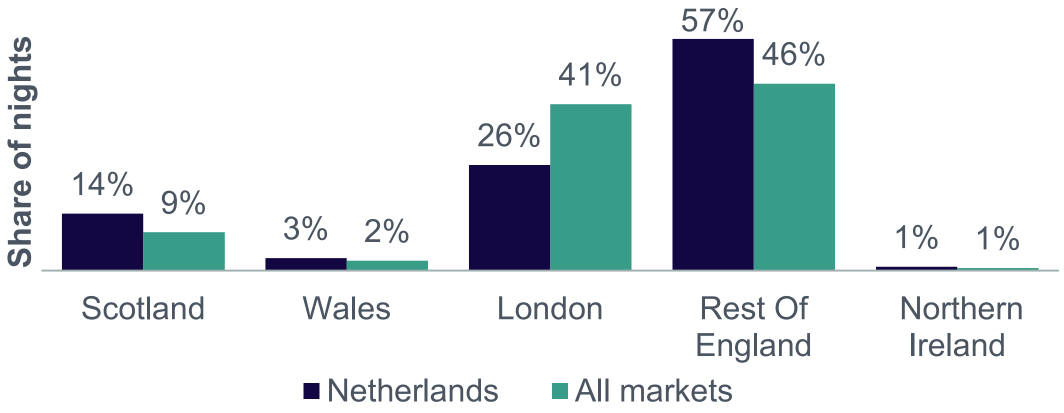
Source: International Passenger Survey by ONS

1.2 Getting around Britain: regional spread and top towns/cities

Top towns and cities visited (2017-2019 average)

Town	Visits (000s)
London	749
Edinburgh	77
Manchester	61
Birmingham	46
Glasgow	37

Regional spread 2019

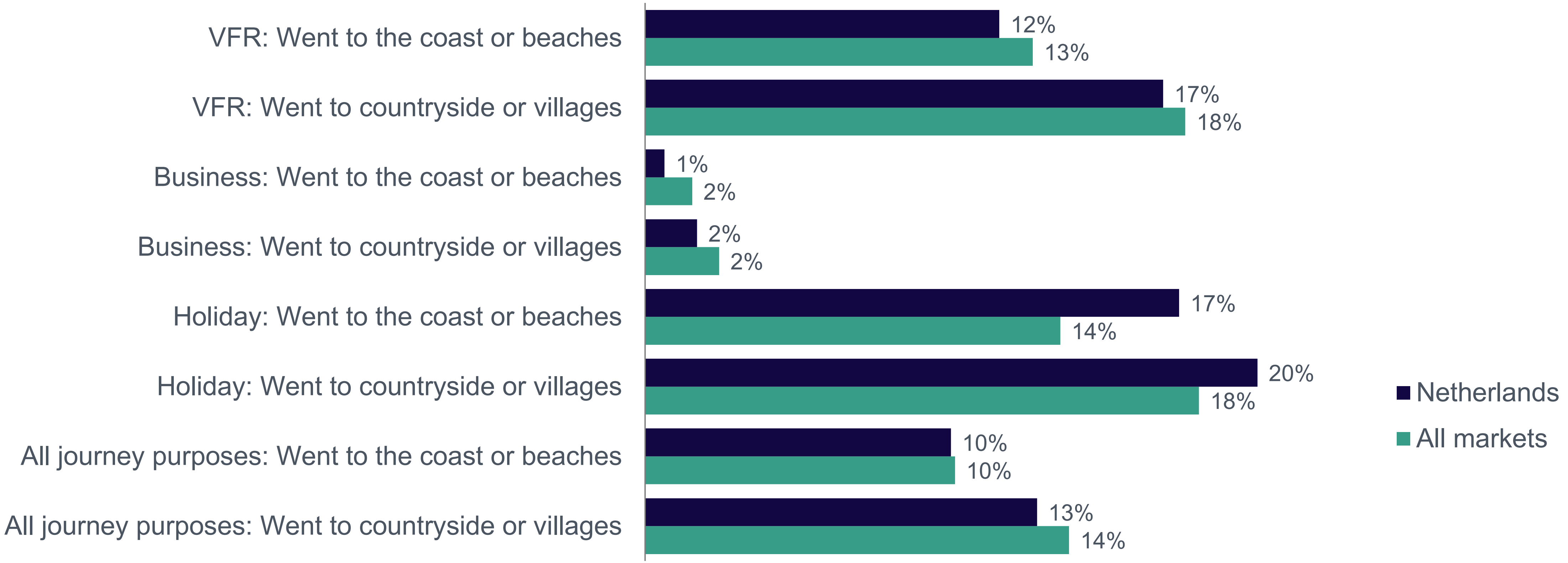


Source: International Passenger Survey by ONS

- London is the leading destination for a trip to the UK, accounting for 26% of visitor nights, but the South East, Scotland and the South West are also popular based on the average nights spent in the UK (2019).
- Dutch visits stand out as a market which has excellent regional spread showing that visitors are prone to venture beyond London when they travel in the UK. Compared to the all market average where more than two in five (41%) visitor nights are spent in London, in the Dutch market it accounts for just over a quarter (26%) which means that almost three quarters of Dutch visitor nights are spent elsewhere in the UK. Nonetheless, Dutch visits to the capital set a new spend record in 2019 making them worth a total of £314m.
- Visits to Scotland saw a volume record in 2019, with 182,000 visits, up 6% on 2018. Dutch visitor spend in Scotland also increased by 11% compared to 2018, reaching £95m.
- New volume records were also set in the North West and West Midlands (156,000 and 133,000 visits respectively), and visitor spend records were set in the North West (£807m) and North East (£391m).
- The number of Dutch visits to Wales reached 63,000, up 14% on 2018 worth a total of £15m.

1.2 Getting around Britain: visits to coast, countryside and villages

Propensity to visit coast, countryside and villages

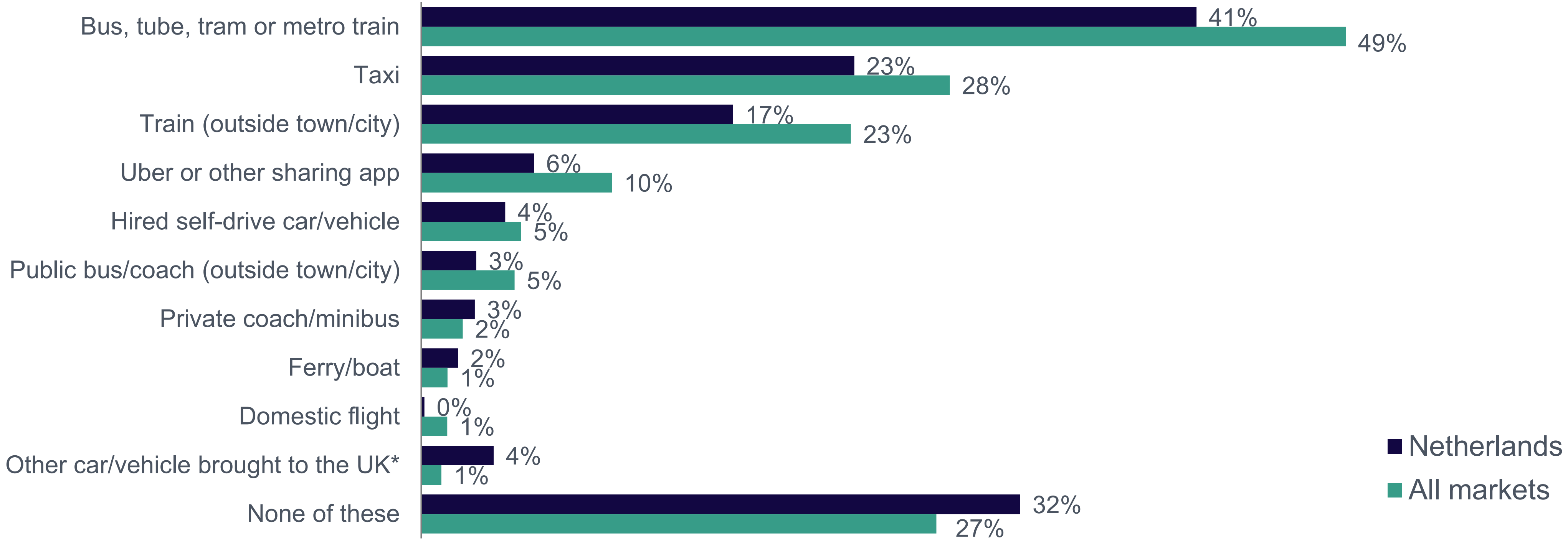


- More than one in ten Dutch visits are likely to go to the countryside or villages as part of their visit and one in ten visit coasts or beaches. Propensity is above the all-market average for those who are visiting for a holiday.

Source: International Passenger Survey by ONS 2016

1.2 Getting around Britain: use of internal modes of transport

Propensity to use internal modes of transport

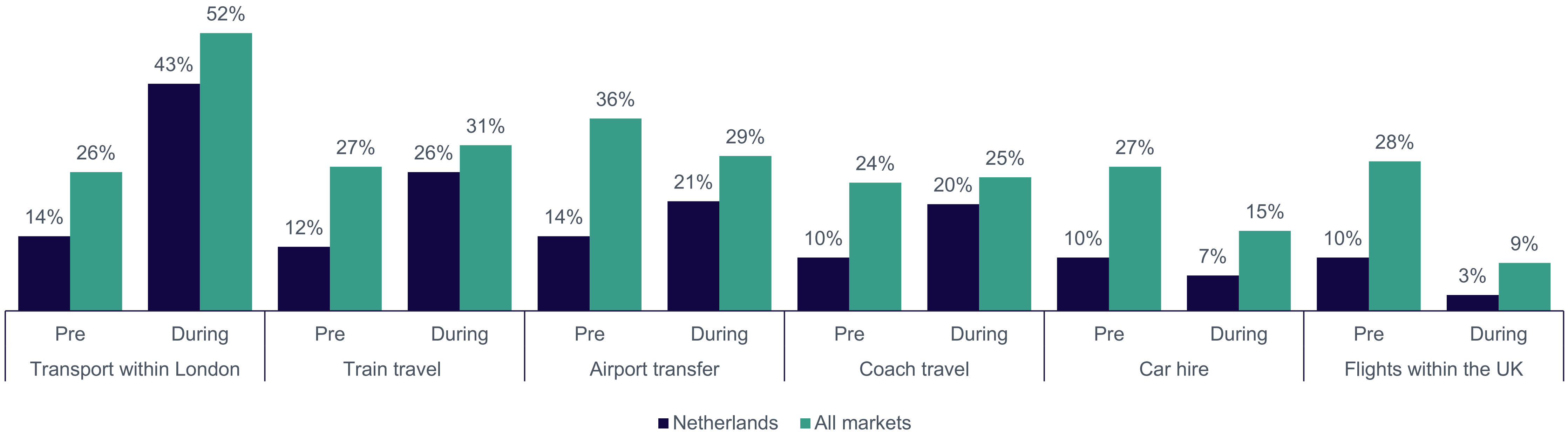


- Dutch visitors have a below-average propensity to use public transport in the UK but when they do they are most likely to use it in cities.
- Almost one in ten Dutch visits involve travellers bringing their own vehicle or hiring a car while in the UK.

Source: International Passenger Survey by ONS 2018; most lorry drivers were not asked this question, and as a consequence, are not taken into account in the results for 'car/vehicle you/group brought to the UK

1.2 Getting around Britain: purchase of transport

Transport services purchased before or during trip (%)



- More than two in five Dutch visitors buy their tickets for transport within London, such as Tube or rail travel tickets, during their stay, rather than before. This pattern applies to all options outlined in the graph including train travel, airport transfers and coach travel, with the exception of car hire and domestic flights in the UK. One in ten Dutch visitors pre-book car hire and flights they plan to take within the UK.

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

1.3 Visitor demographics

Visitor characteristics

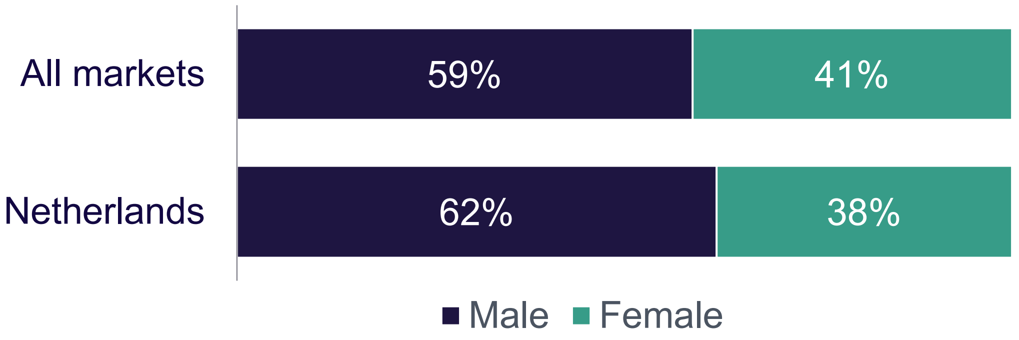
- The age cohort 45-54 makes up the largest volume of visits from the Netherlands to the UK in 2019, followed by 25-34s and then 35-44s. Visits from those aged 55-64 grew in 2019 reaching a record 283,000 visits worth a record £135m. Visits from those aged 45-54 also contributed a record of £208m to the UK in 2019.
- The majority of Dutch visitors are male (62% vs 38% female). Business visitors are nearly four times as likely to be men than women.
- Dutch visitors mostly travel on their own (37%) followed by travelling with a spouse/partner (29%). The Dutch also have a slightly higher propensity to travel with adult friends or with business colleagues than the average visitor.
- Most visits from residents of the Netherlands to the UK were made by Dutch nationals (80%), although 26% of those visiting friends/relatives were British nationals.
- The largest proportion of Dutch visitors who visit the UK reside in Noord Holland (45%), followed by Zuid Holland (26%).*

Business visitors are nearly four times as likely to be men than women

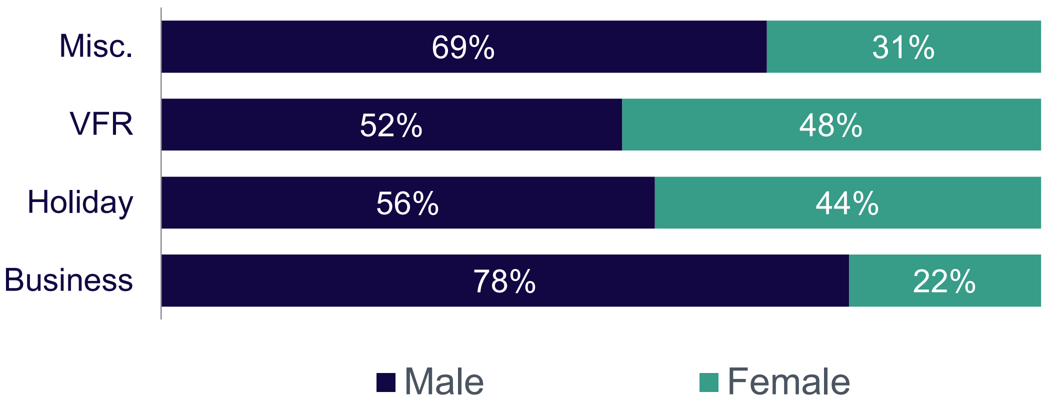
Source: International Passenger Survey by ONS, *IPS 2015

1.3 Visitor demographics: gender and age groups

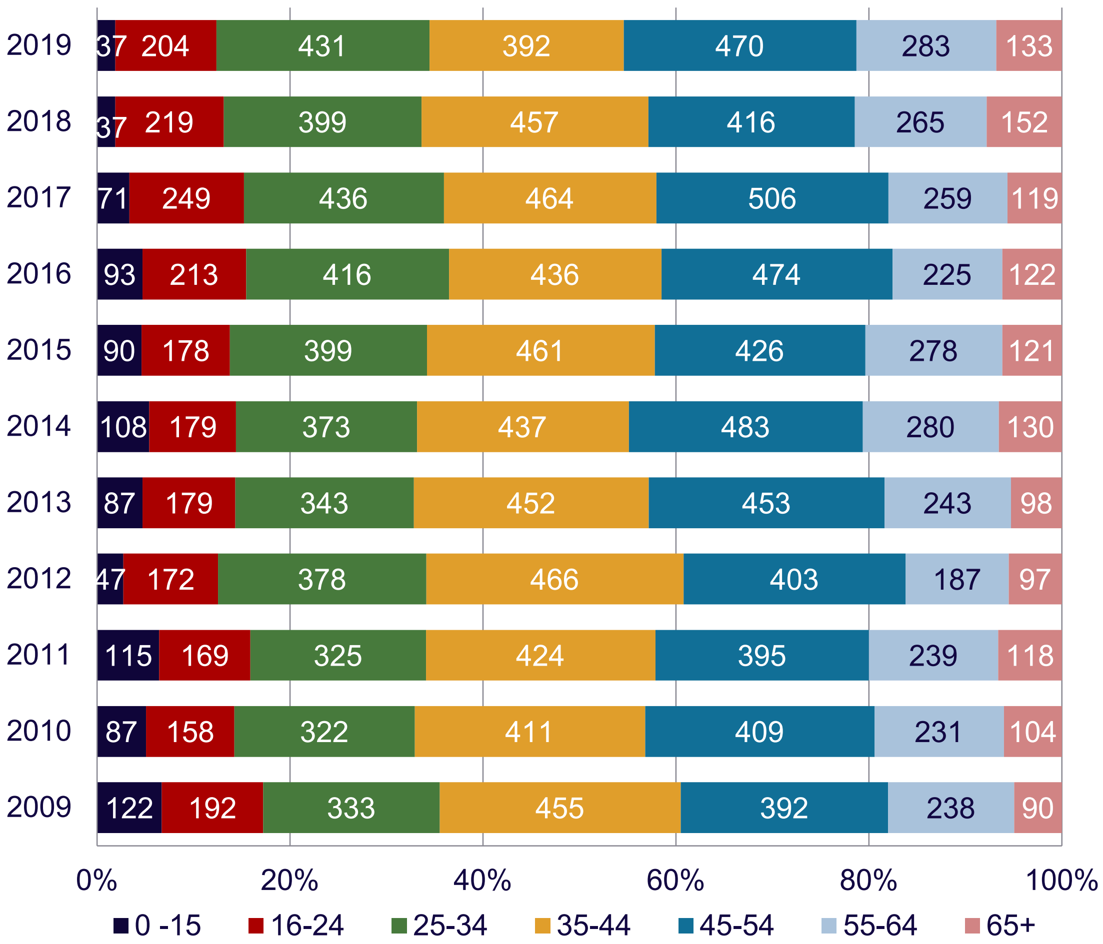
Gender ratio of visits (2019):



Gender ratio of visits from the Netherlands by journey purpose (2019):



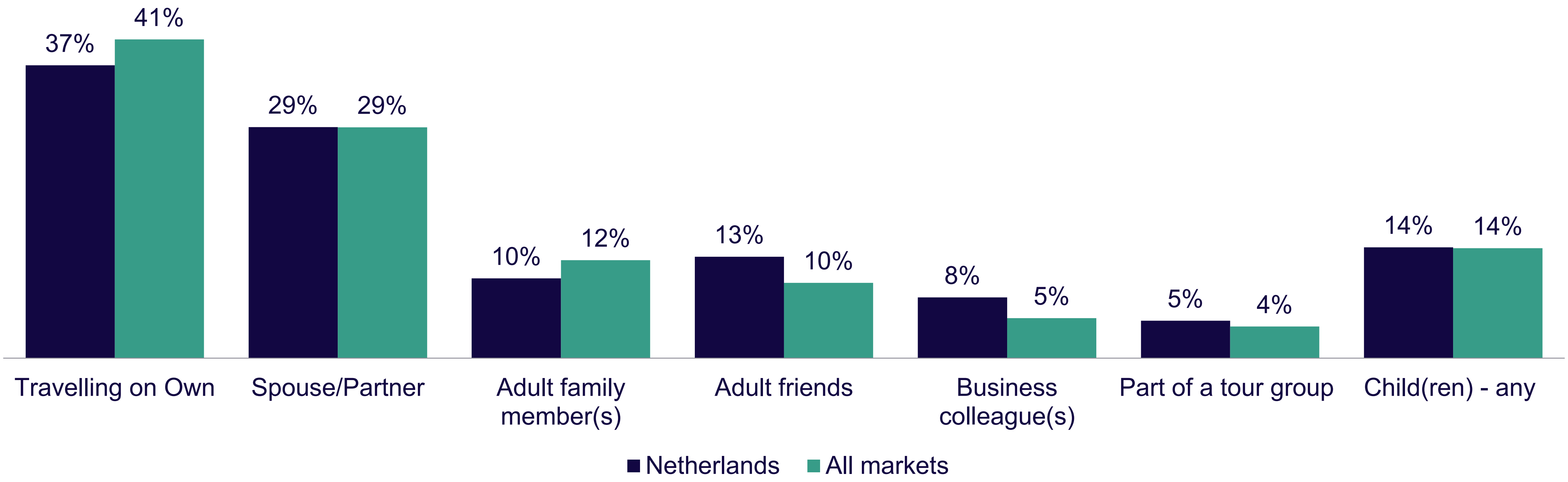
Age group trend (visits in 000s)



Source: International Passenger Survey by ONS

1.3 Visitor demographics: travel companions

Who have Dutch visitors to the UK travelled with?



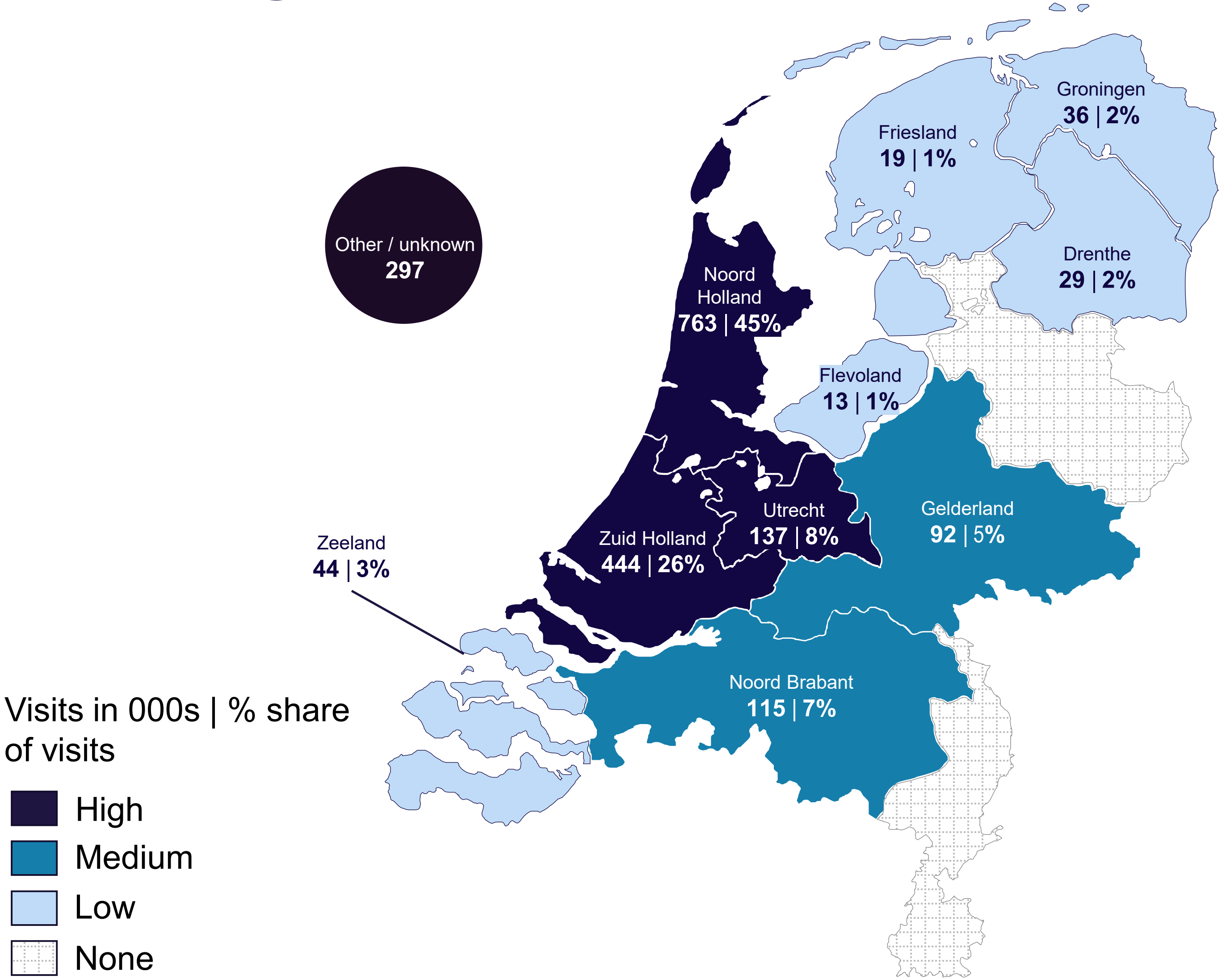
- Almost two in five of Dutch visits are made by travellers on their own and 29% travel with their partner/spouse.
- The Dutch have a slightly higher propensity to travel with adult friends or with business colleagues than the average visitor.
- In line with the global average, 14% travel with children.

Source: International Passenger Survey by ONS, 2017, Who accompanied you on your visit to the UK, excluding UK residents you may have visited during your trip?

1.3 Visitor demographics: origin

Visits to the UK

- The largest proportion of Dutch visitors who came to the UK reside in Noord Holland and Zuid Holland followed by Utrecht (2014).
- 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.



Source: International Passenger Survey by ONS 2014, CIA World Factbook 2021

1.4 The UK and its competitors (1)

Visitor characteristics

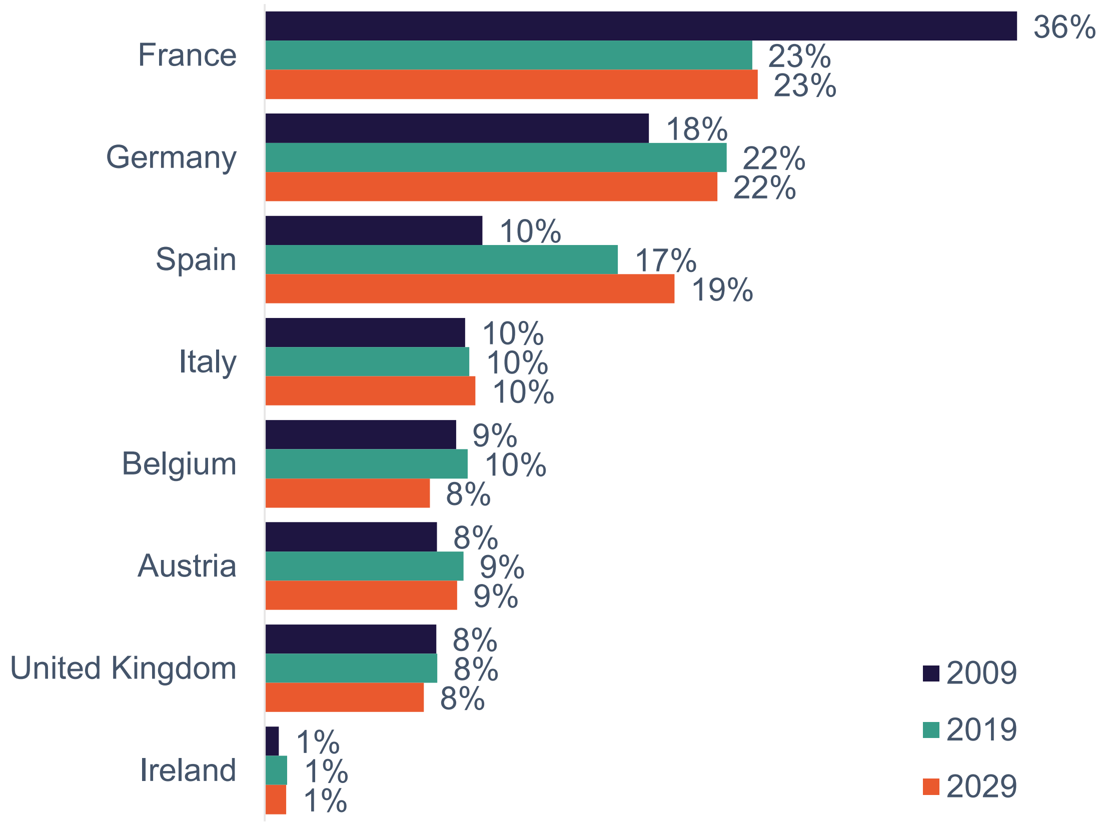
- In 2019, the UK was the 7th most visited destination by Dutch travellers behind France, Germany, Spain, Italy, Belgium and Austria. The UK's position in the destination ranking has been stable since 2016.
- In a highly competitive set of destinations within Europe, the UK is projected to struggle keeping its market share, as are Austria, Germany, Belgium, and Ireland, albeit none set to lose much of it. Spain on the other hand is forecast to expand its market share, as are France and Italy but to a smaller degree.
- Due to COVID-19 there is a higher interest in the domestic market with 50% making plans to staycation in 2021.
- The volume of Dutch visits to the UK has steadily grown by 9% from 2009 to 2019 – primarily boosted by holiday and VFR visits.
- Due to COVID-19, both visits and spend dropped by 69% in 2020.
- Despite the severe shorter-term impact of the COVID-19 pandemic, visits from the Dutch market are forecast to grow by 13% comparing 2019 and 2030, and Dutch visitor spend in the UK by 31% in the same timeframe, with the value of the Dutch market forecast to exceed £1 billion from 2029.

The UK ranks
7th
for Dutch
overnight visits in
2019.

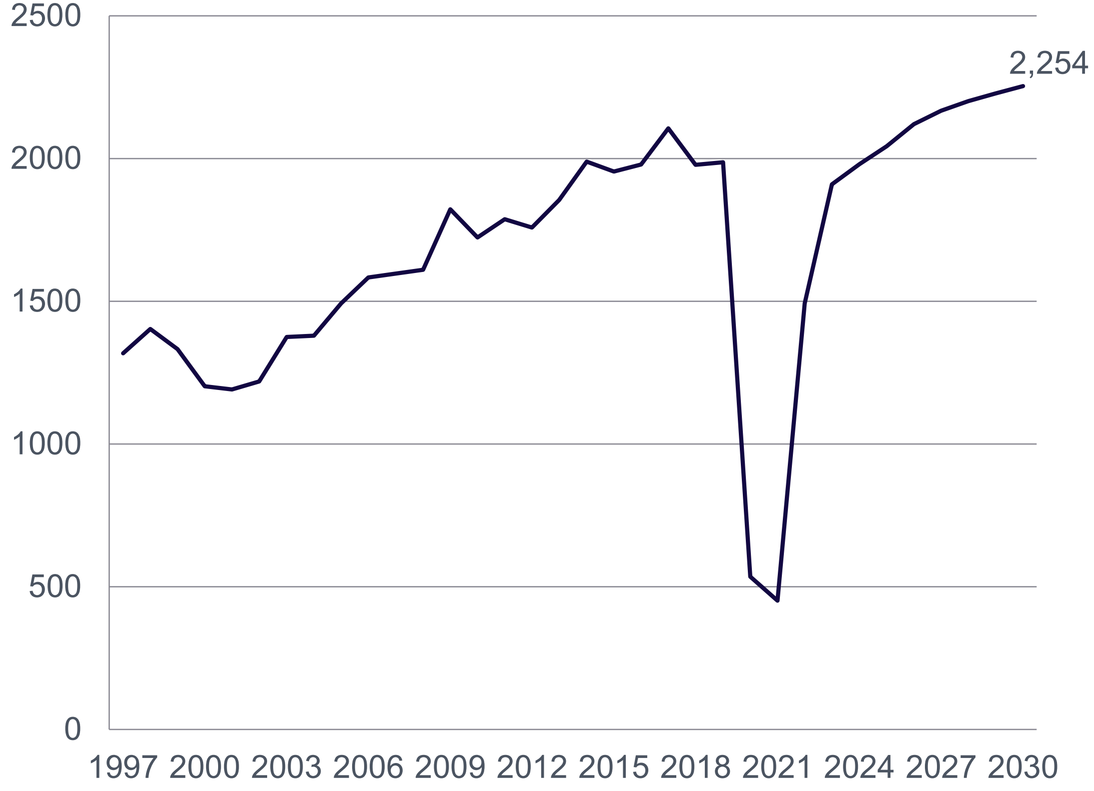
Source: *NBTC-NIPO, Oxford Economics for competitor set based on overnight visits, 'Historic and potential visits' displays total visits based on International Passenger Survey historic data and Oxford Economics forecasts with VisitBritain adaptations. Please note that given the current situation, prospects can change rapidly, whether for overall inbound tourism or for market-to-market prospects.

1.4 The UK and its competitors (2)

The UK's market share of Dutch visits among competitor set



Historic and potential visits to the UK (000s)



Source: Oxford Economics for competitor set based on overnight visits, 'Historic and potential visits' displays total visits based on International Passenger Survey historic data and Oxford Economics forecasts with VisitBritain adaptations. Please note that given the current situation, prospects can change rapidly, whether for overall inbound tourism or for market-to-market prospects.

Experiences and perceptions

Chapter 2

2.1 Inbound activities: summary

- Dining in restaurants is the number one activity which is enjoyed by around 62% of inbound Dutch visitors to the UK. Around half of Dutch travellers also enjoy going shopping and going to the pub. When the Dutch visit the UK for a holiday they have an even higher propensity to engage in these activities.
- When in the UK to visit friends and relatives, half of the Dutch enjoy socialising with locals.
- Sightseeing is the second most popular activity for Dutch visitors on holiday in the UK. Around half of them also visit castles and historic houses and spend time at parks and gardens. More than two in five go to museums and galleries while on holiday in the UK.
- Close to 77,000 Dutch visits per annum feature time watching football.
- Spending time outdoors walking in the countryside and along the coast are popular with many Dutch holiday visitors and those seeing friends and family here.

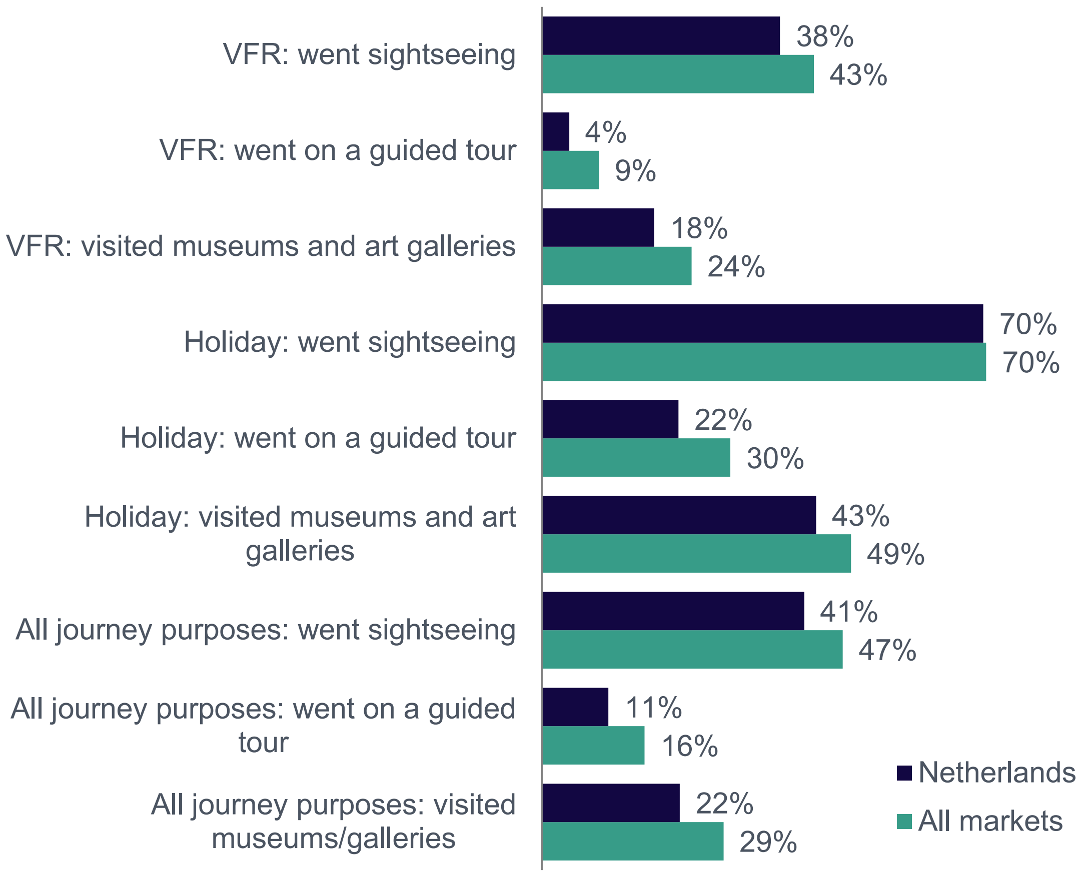
Top 10 activities for Dutch visitors during their visit to the UK

1. Dining in restaurants
2. Going shopping
3. Going to the pub
4. Sightseeing famous monuments/ buildings
5. Socialising with locals
6. Visiting parks or gardens
7. Visiting castles or historic houses
8. Walking in the countryside
9. Visiting museums and art galleries
10. Visiting religious buildings

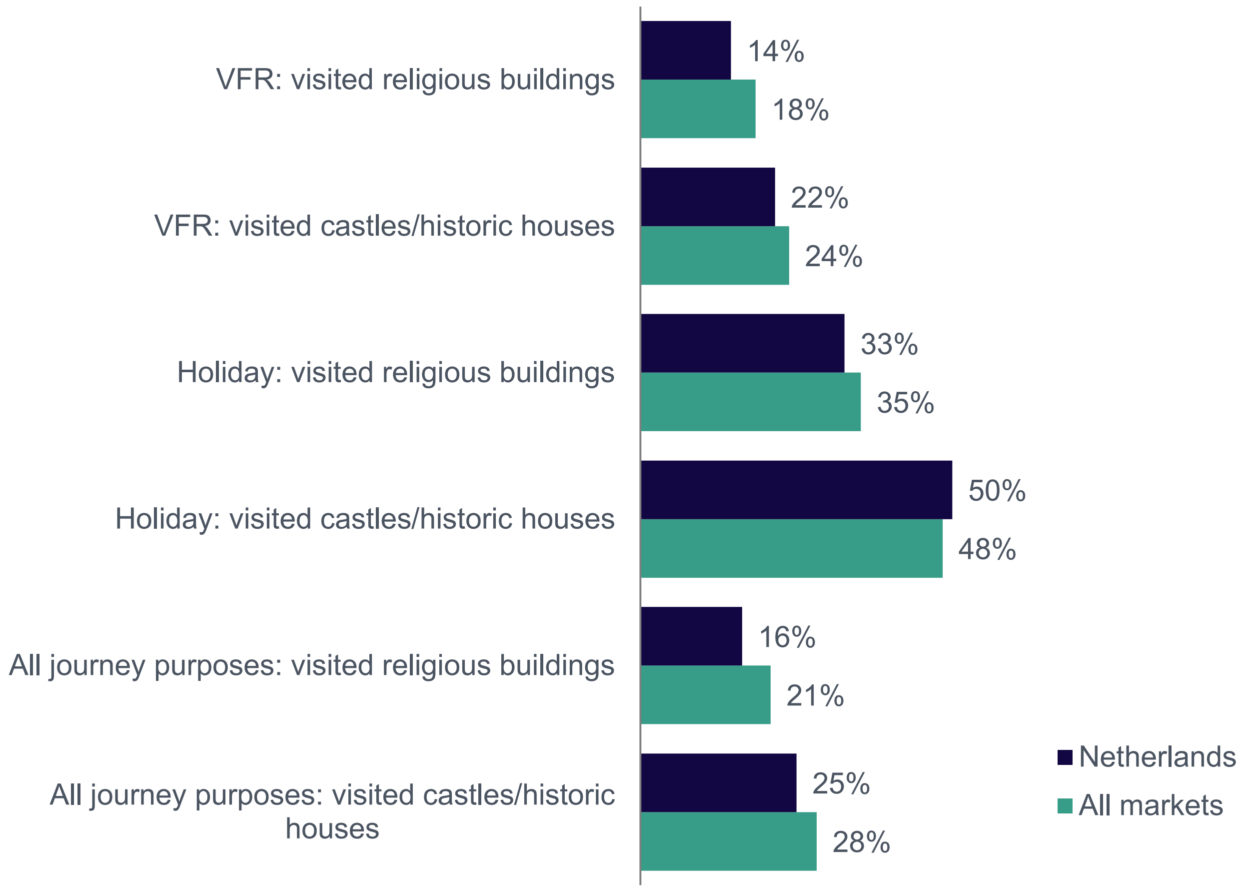
Source: International Passenger Survey by ONS, rankings based on 2007-2019 data

2.1 Inbound activities: tourism and heritage

Propensity to go sightseeing, visit museums and galleries or to go on a guided tour



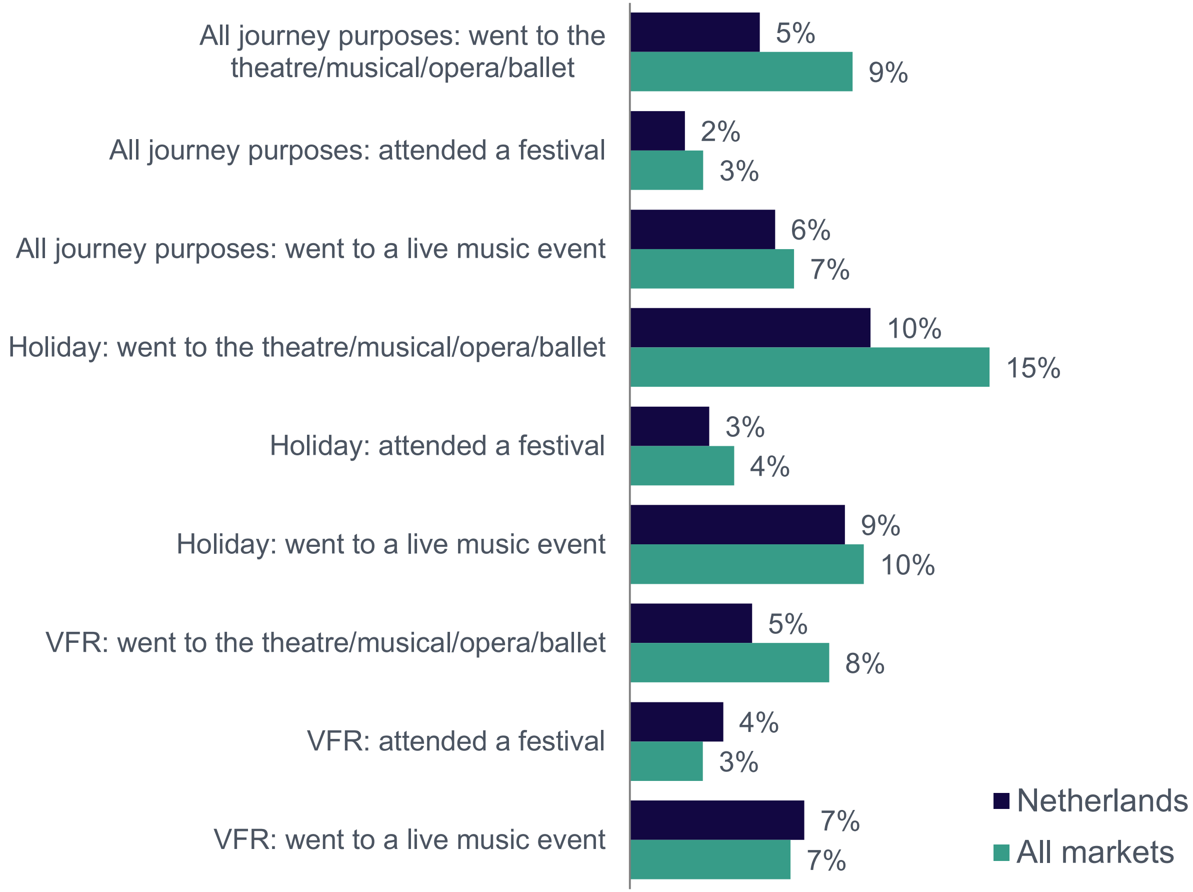
Propensity to visit built heritage sites



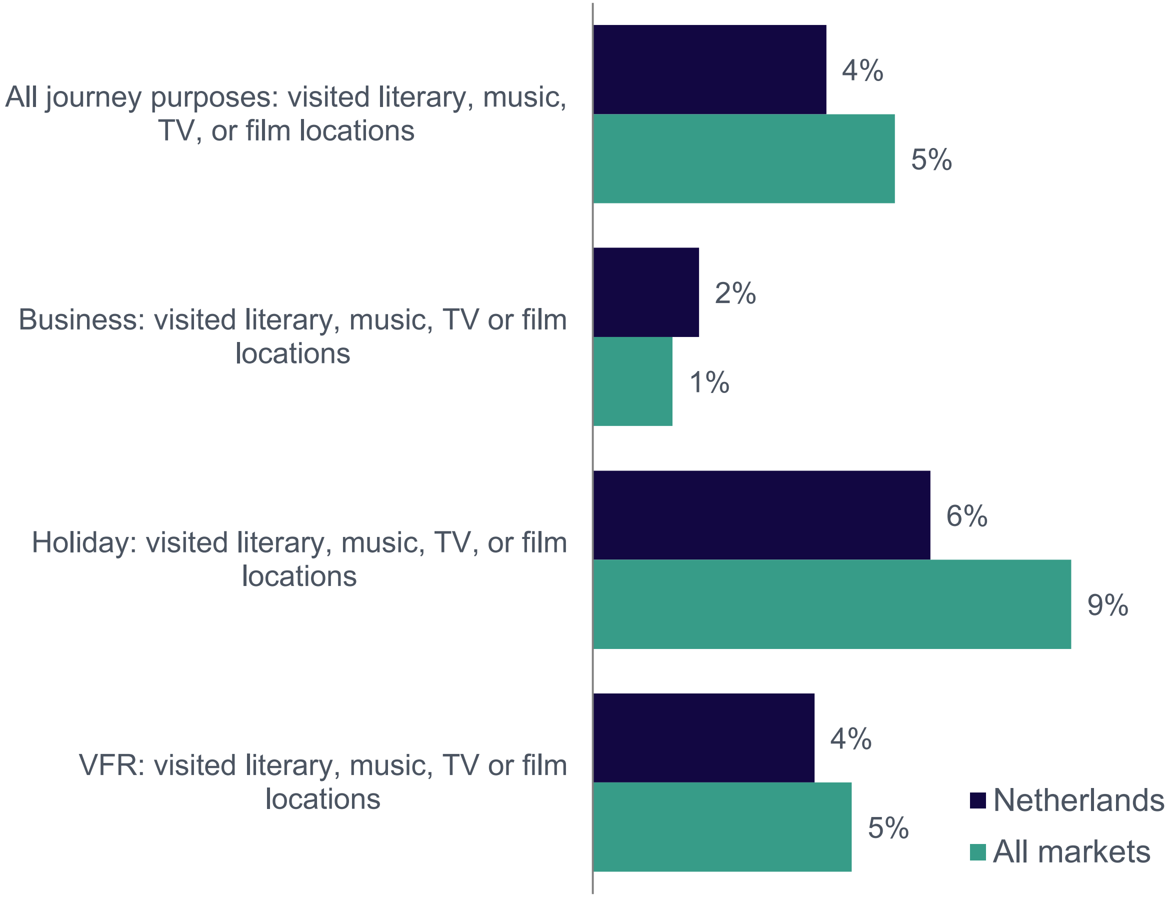
Source: International Passenger Survey by ONS, 2016

2.1 Inbound activities: culture

Propensity to attend the performing arts



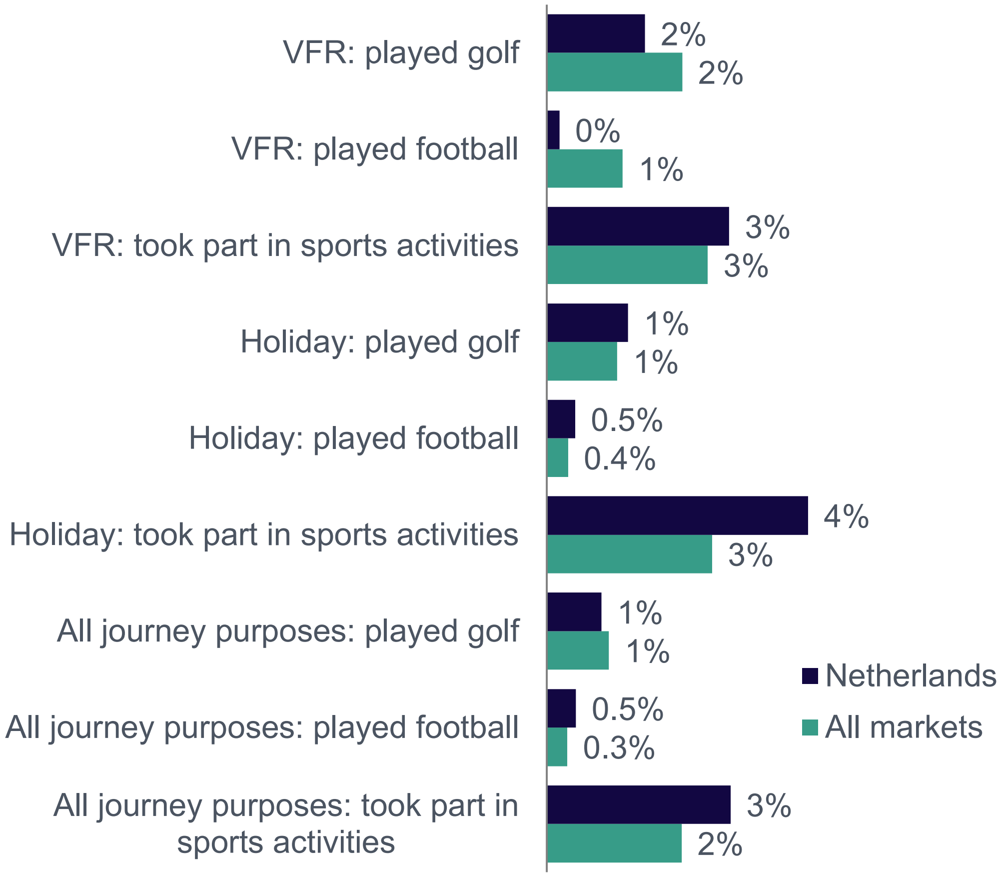
Propensity to visit literary, music, TV, or film locations



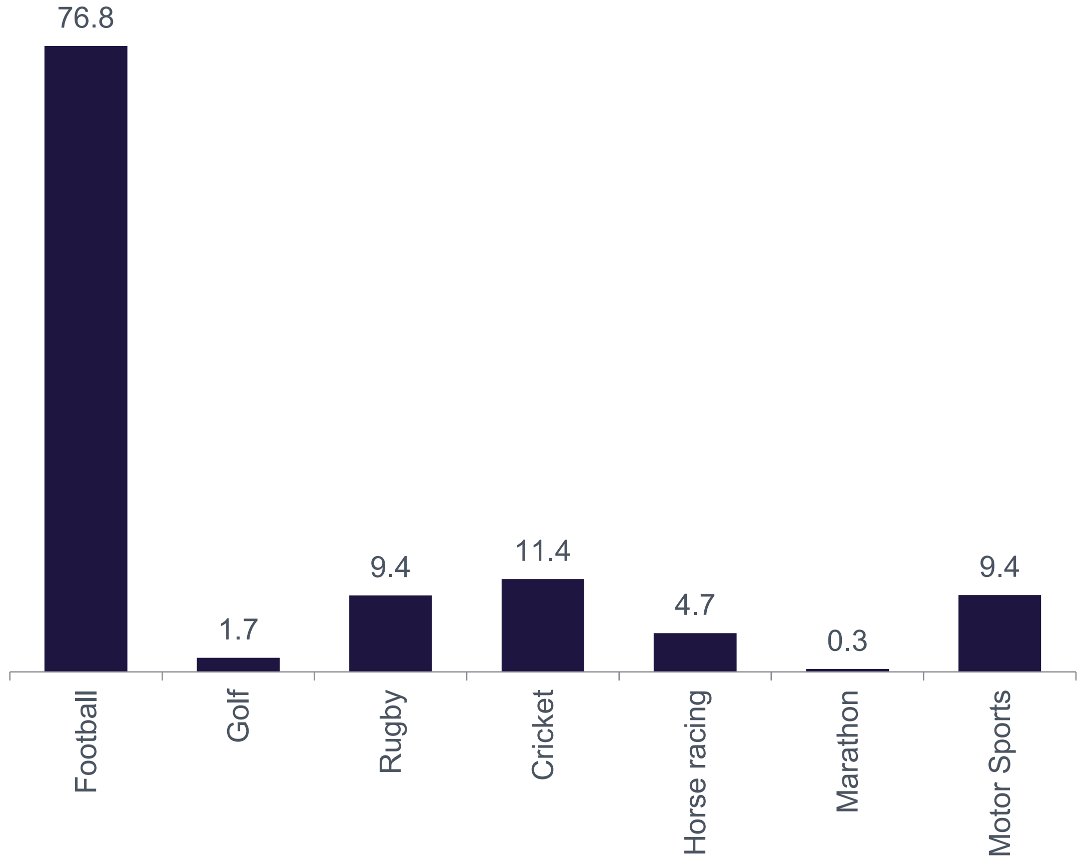
Source: International Passenger Survey by ONS, 2016 (performing arts)

2.1 Inbound activities: sports

Propensity to partake in sports-related activities



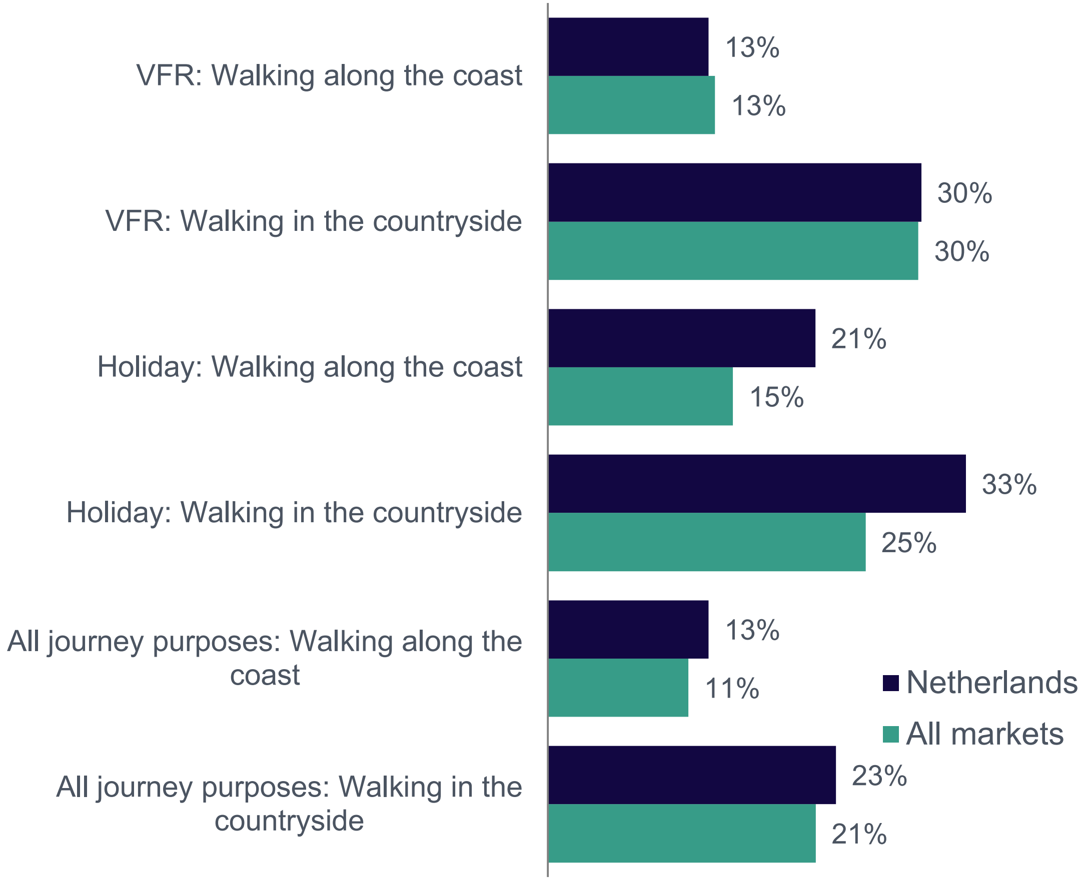
Number who watched sports live during trip (000s)



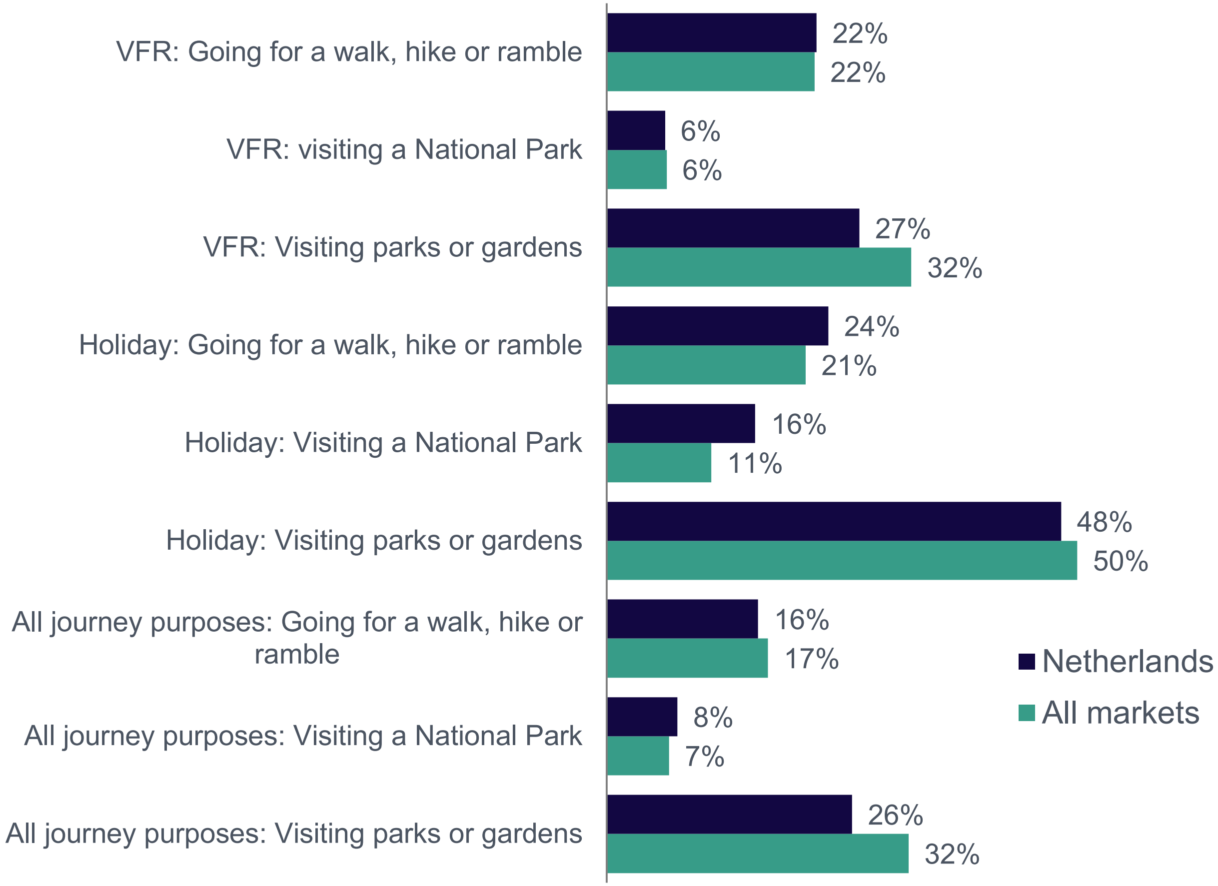
Source: International Passenger Survey by ONS, 2011, 2014 and 2019 (watched sports live)

2.1 Inbound activities: outdoors

Propensity to go walk along the coast or in the countryside



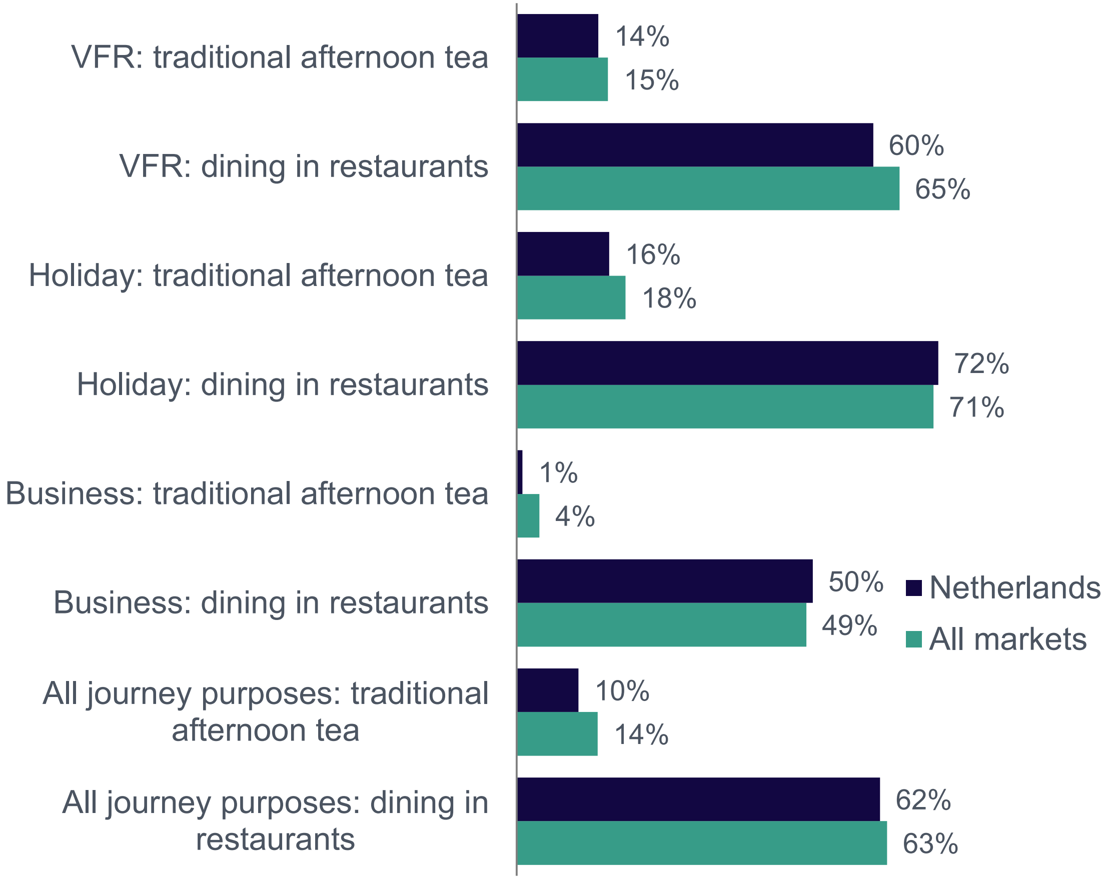
Propensity to enjoy the outdoors



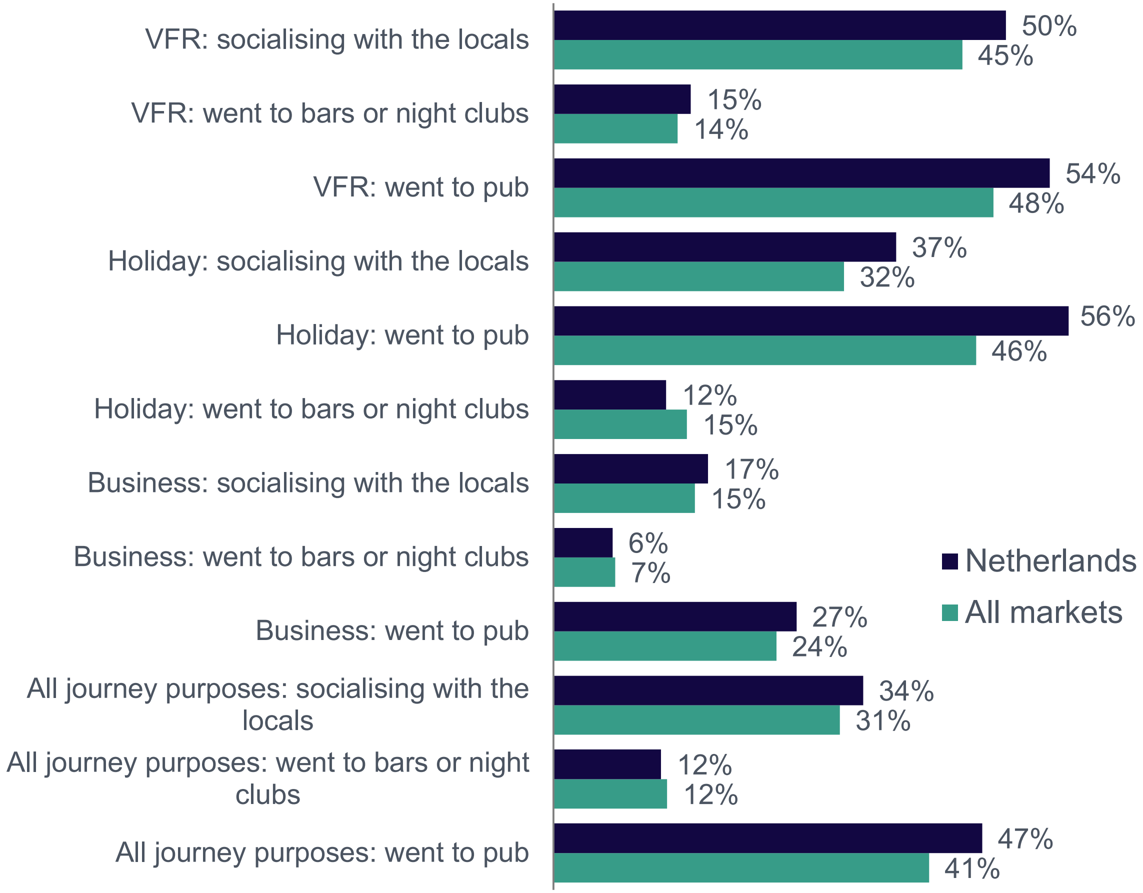
Source: International Passenger Survey by ONS, 2019 (walking along the coast/in the countryside), 2016 (visiting parks and gardens and a national park), 2014 (hiking/rambling)

2.1 Inbound activities: going out

Propensity to go to restaurants, or to have a traditional afternoon tea



Propensity to go to the pub or bars and night clubs, or to socialise with locals

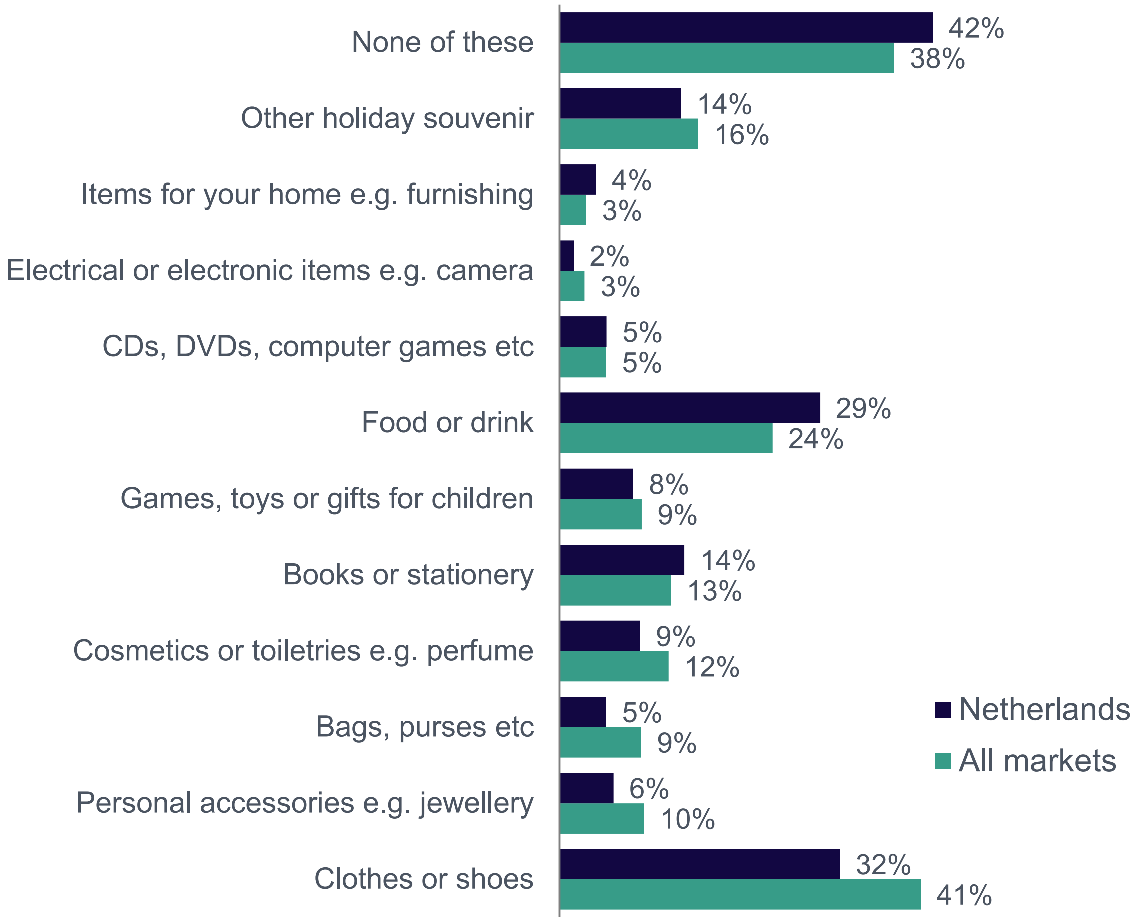


Source: International Passenger Survey by ONS, 2019 (dining in restaurants and having a traditional afternoon tea) and 2017 (all other activities)

2.1 Inbound activities: shopping

Propensity to go to shopping

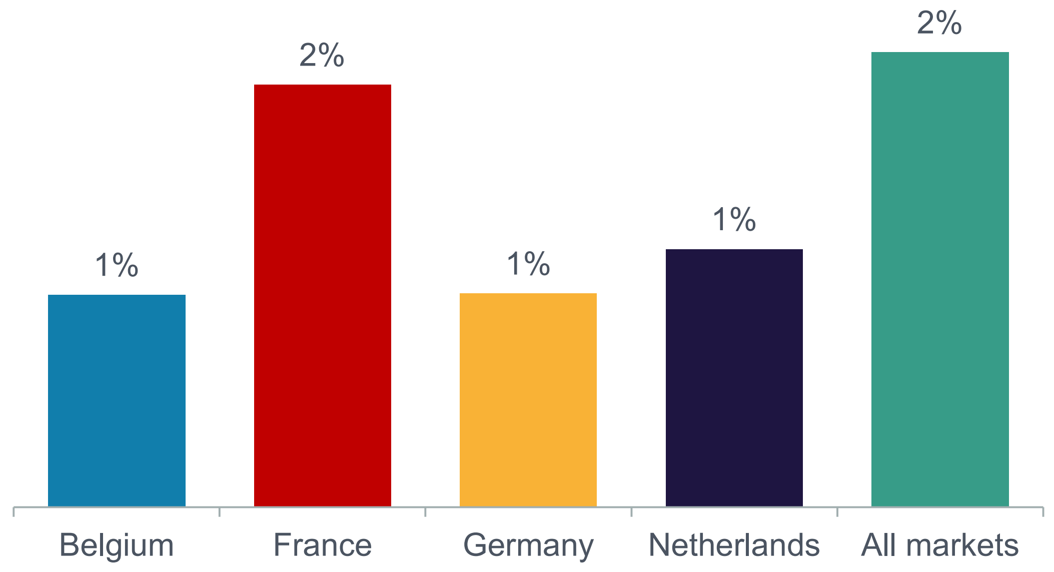
Propensity to purchase selected items



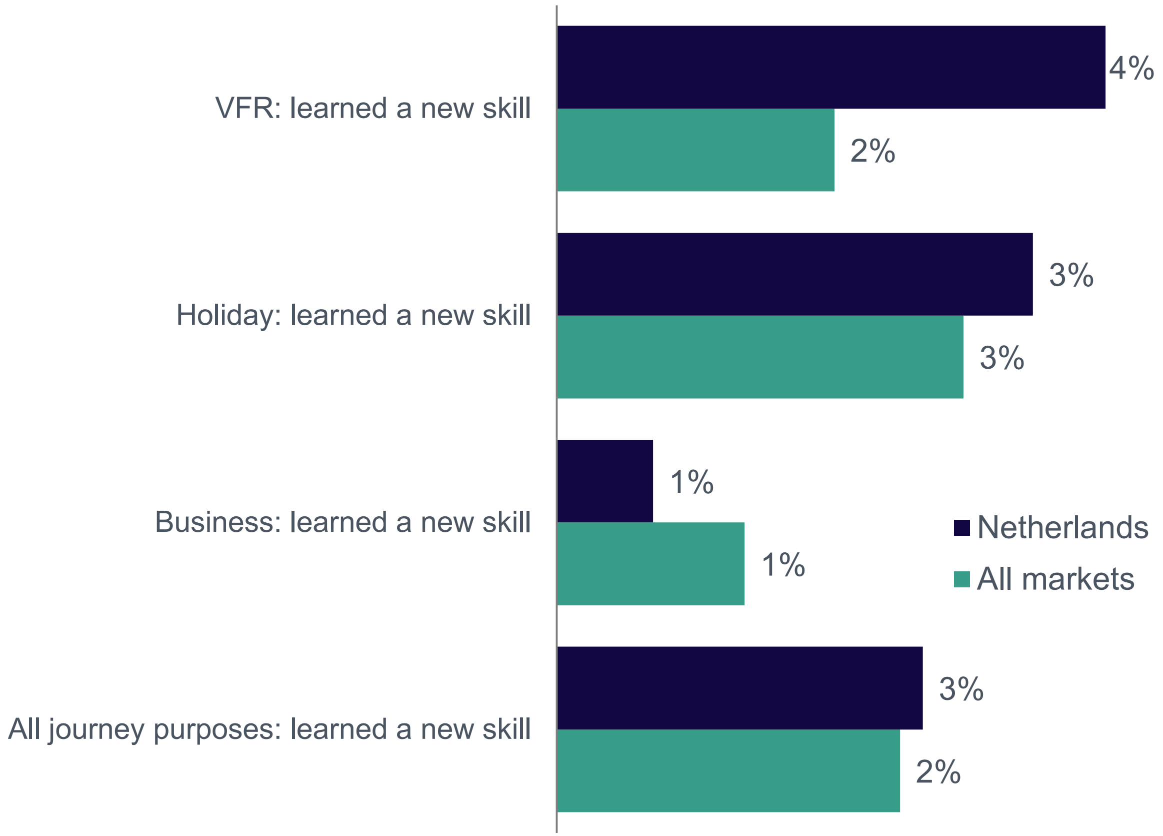
Source: International Passenger Survey by ONS, 2017 (shopping) and 2013 (purchase of selected items) – please note that the data about purchased items is to be updated shortly given the revision of the 2009-2018 IPS data in May 2020

2.1 Inbound activities: learning

Propensity to participate in an English language course during a visit to the UK (share of all visits)



Propensity to learn a new skill or craft



Source: International Passenger Survey by ONS, 2019 (new skills/craft), 2018, Did you go on any English language courses during this visit? Displayed as % of all visits in this market, visits incl. participation in an English language course might be based on a small sample.

2.2 Experiencing a visit to the UK

- Eight in ten visitors from the Netherlands felt ‘Very Welcome’ during their stay in the UK, in line with the inbound average.
- 96% of Dutch visitors are either ‘Very’ or ‘Extremely’ likely to recommend the UK for a holiday or short-break.
- Asked for reasons which would encourage Dutch visitors to travel back to the UK for a holiday, more than half said that they’d want to visit a different part of the country.
- About half said that the UK is easy for them to get to. Two in five state they’d go back to see attractions they didn’t see on a previous visit and almost as many that the country caters well to tourists. Almost a third are motivated by the ease of getting around the UK. More than a quarter would like to experience an activity they have not engaged in on a previous visit to the UK.
- The Dutch have a below-average propensity to return e.g. for food and drink which is in general a draw to return for more than two in five for other destinations.
- Just over one in ten respondents were not planning to come to the UK for another visit.

96%

of Dutch visitors would recommend a holiday or short break in the UK*

Source: IPS by the ONS (2017; *all visits, excluding UK nationals), Ipsos-Anholt Nation Brands Index 2019 (previous visits refer to previous holiday visit(s) made to the UK)

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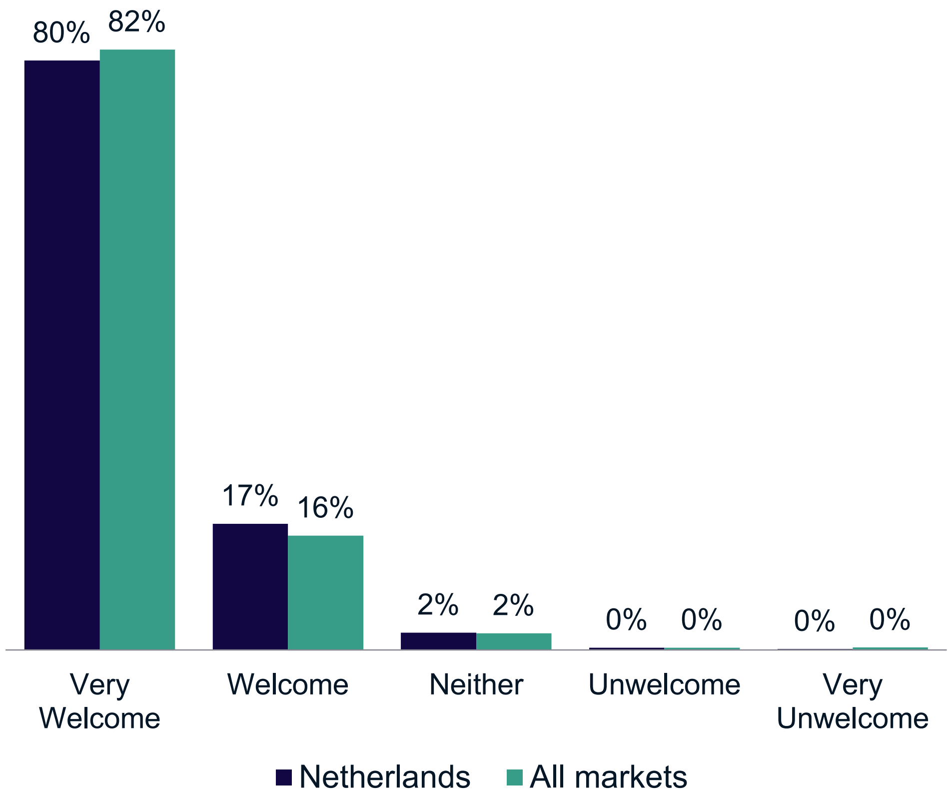
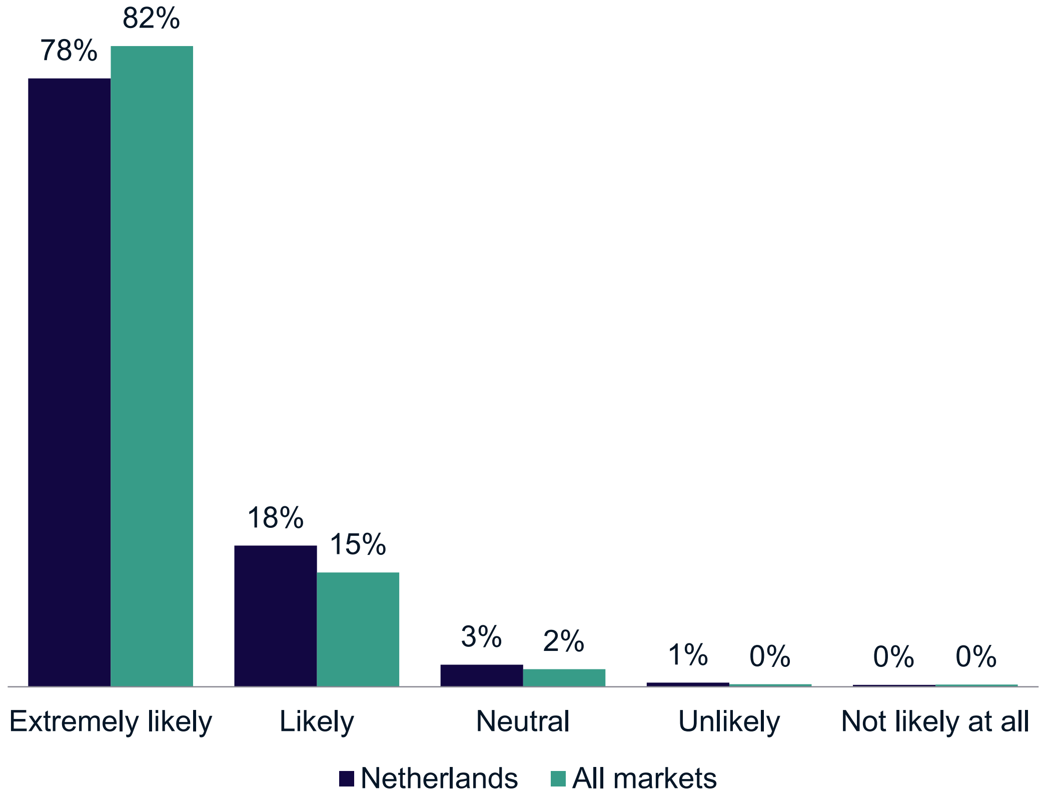
2.2 Welcome and recommending Britain

Feeling of ‘welcome’ in Britain



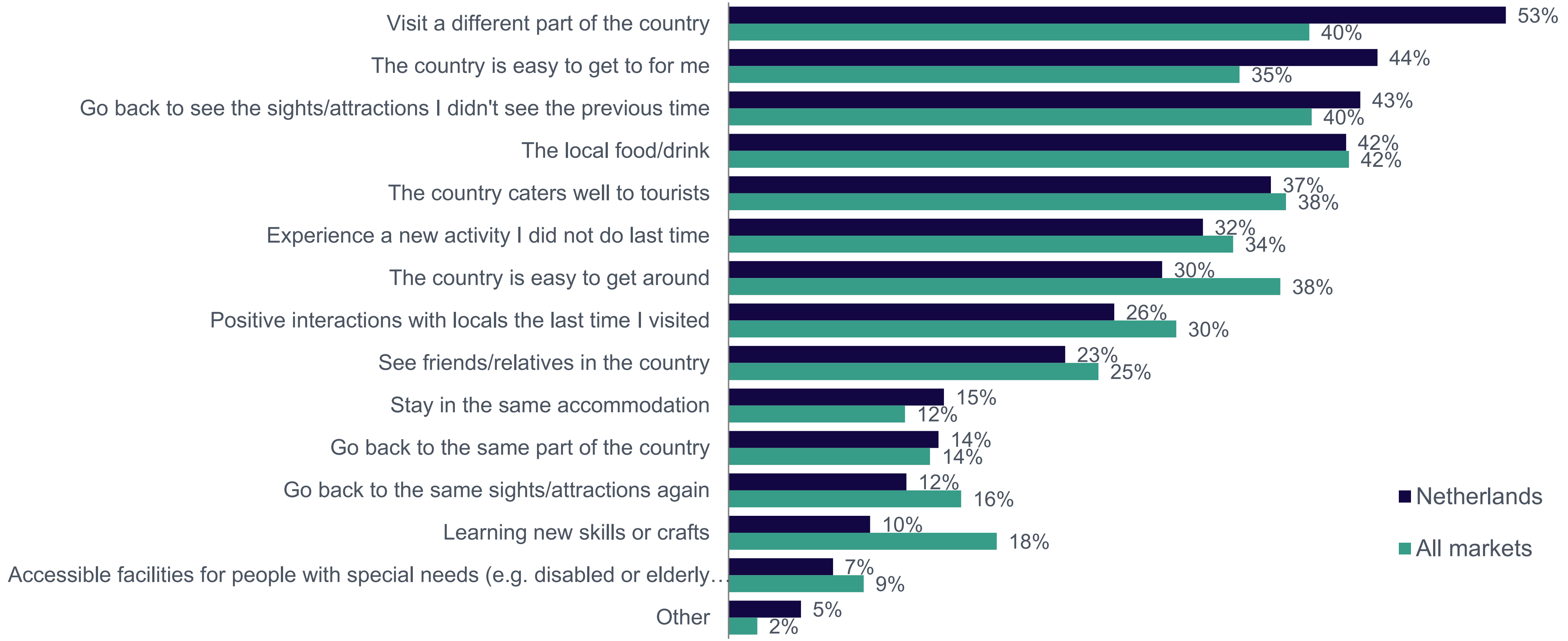
Likelihood to recommend Britain



Source: International Passenger Survey by ONS, 2017 (excl. UK nationals and nil nights)

2.2 Reasons to return to a holiday destination

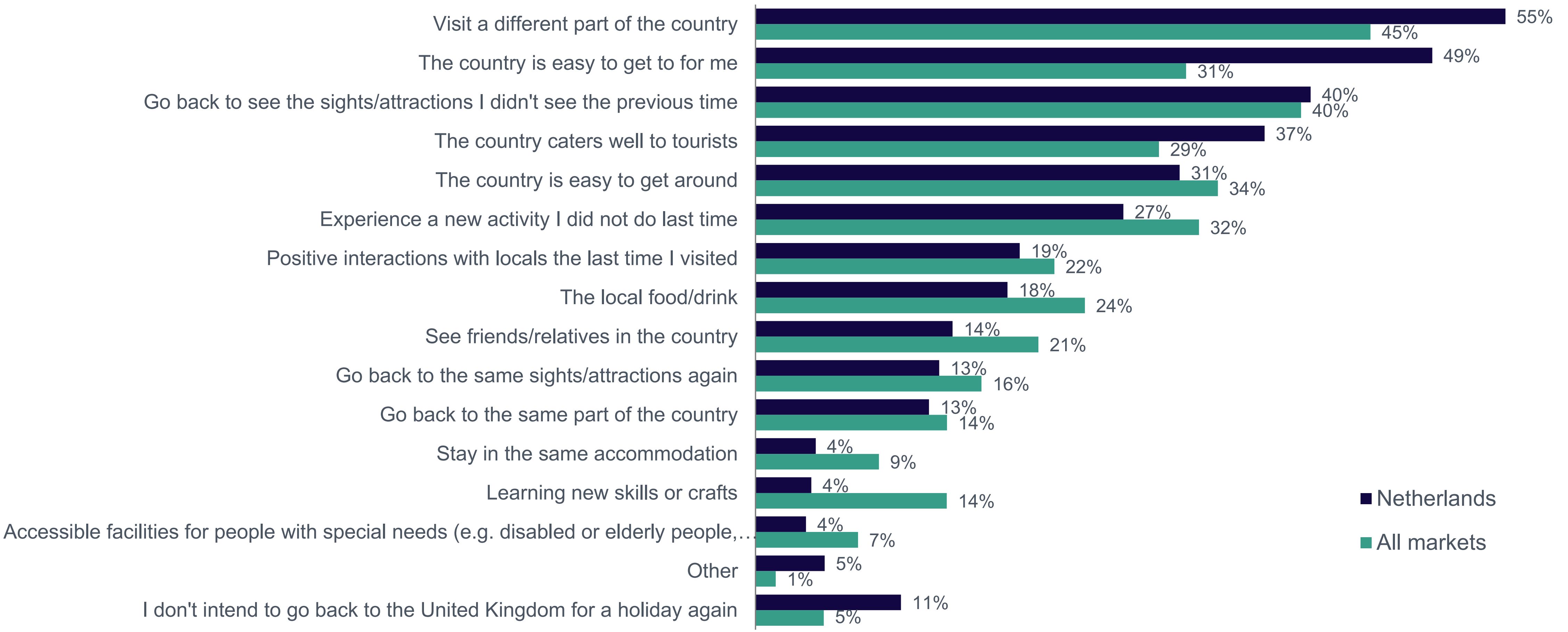
Reasons to return to a destination in general



Source: Anholt-Ipsos Nation Brands Index 2019

2.2 Reasons to return to the UK

Reasons to return to the UK



Source: Anholt-Ipsos Nation Brands Index 2019

2.3 Perceptions of the UK (1)

- The Dutch rate the UK highly for culture in general, contemporary culture, sports, vibrant cities and cultural and built heritage, but less for welcome and scenic natural beauty; the UK was rated 16th and 26th out of fifty nations respectively on these two attributes in 2019.
- Music, films, museums and sports are the cultural products/ services most strongly associated with the UK among the Dutch.
- A trip to the UK would be expected to be 'Relaxing', 'educational' and 'fascinating' by the Dutch.
- 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.
- Activities that appeal to potential visitors from the Netherlands include spotting wildlife in the Scottish Highlands, enjoying a traditional afternoon tea, taking a canal boat tour in England, riding the scenic 'Hogwarts Express' (Harry Potter train) in the Highlands, walking along Hadrian's Wall in Northern England, staying the night in a fairy-tale castle, driving through the countryside of England, and sharing stories over a pint with locals in a cosy rural pub.

Biggest draws for Dutch holiday visitors:

Cultural attractions, vibrant cities and countryside

Source: Ipsos-Anholt Nation Brands Index 2018 and 2019, VisitBritain/Ipsos 2016, VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (2)

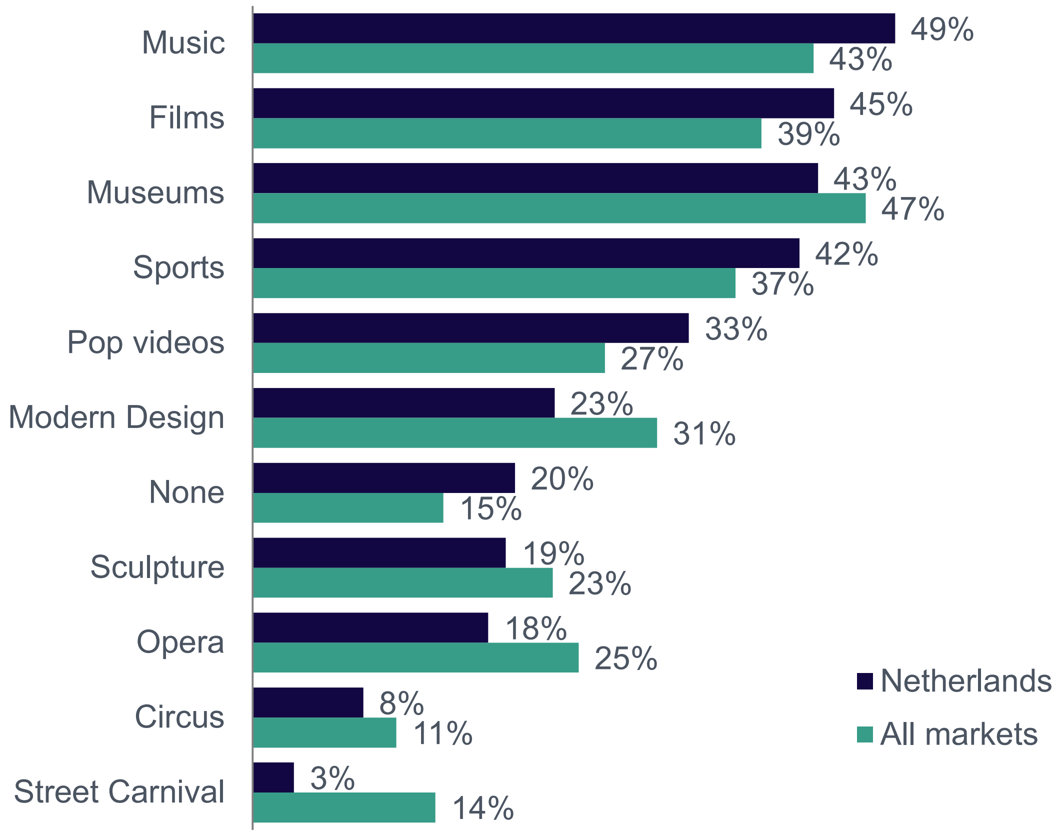
UK's ranking (out of 50 nations)

Measure	Dutch respondents	All respondents
Overall Nation Brand	**11**	**4**
Culture (overall)	**3**	**5**
The country has a rich cultural heritage	5	7
The country is an interesting and exciting place for contemporary culture such as music, films, art and literature	4	3
The country excels at sports	4	5
People (overall)	**12**	**7**
If I visited the country, the people would make me feel welcome	16	16
Tourism (overall)	**7**	**4**
Would like to visit the country if money was no object	13	6
The country is rich in natural beauty	26	26
The country is rich in historic buildings and monuments	5	5
The country has a vibrant city life and urban attractions	5	4

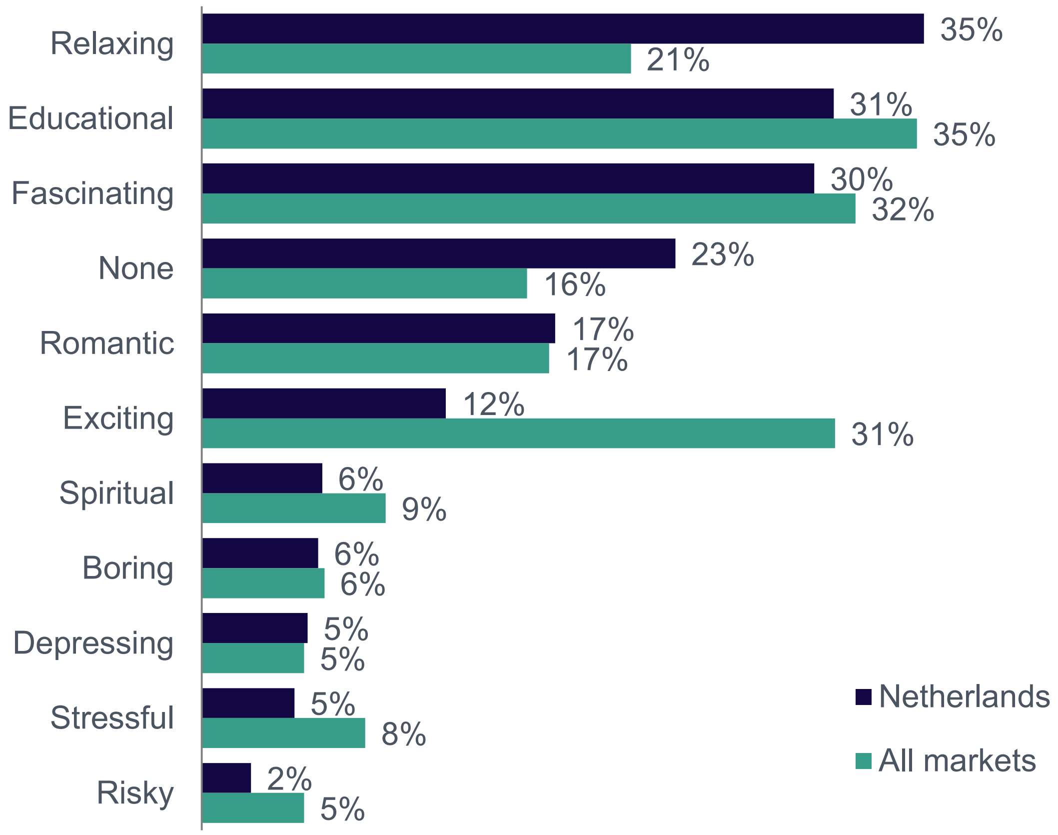
Source: Ipsos-Anholt Nation Brands Index 2019

2.3 Perceptions of the UK (3)

Cultural associations



Adjectives describing a potential trip to the UK



Source: Ipsos-Anholt Nation Brands Index 2019

2.3 Perceptions of the UK (4)

Holiday wants and % saying destination is best place for… top 20

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%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (5)

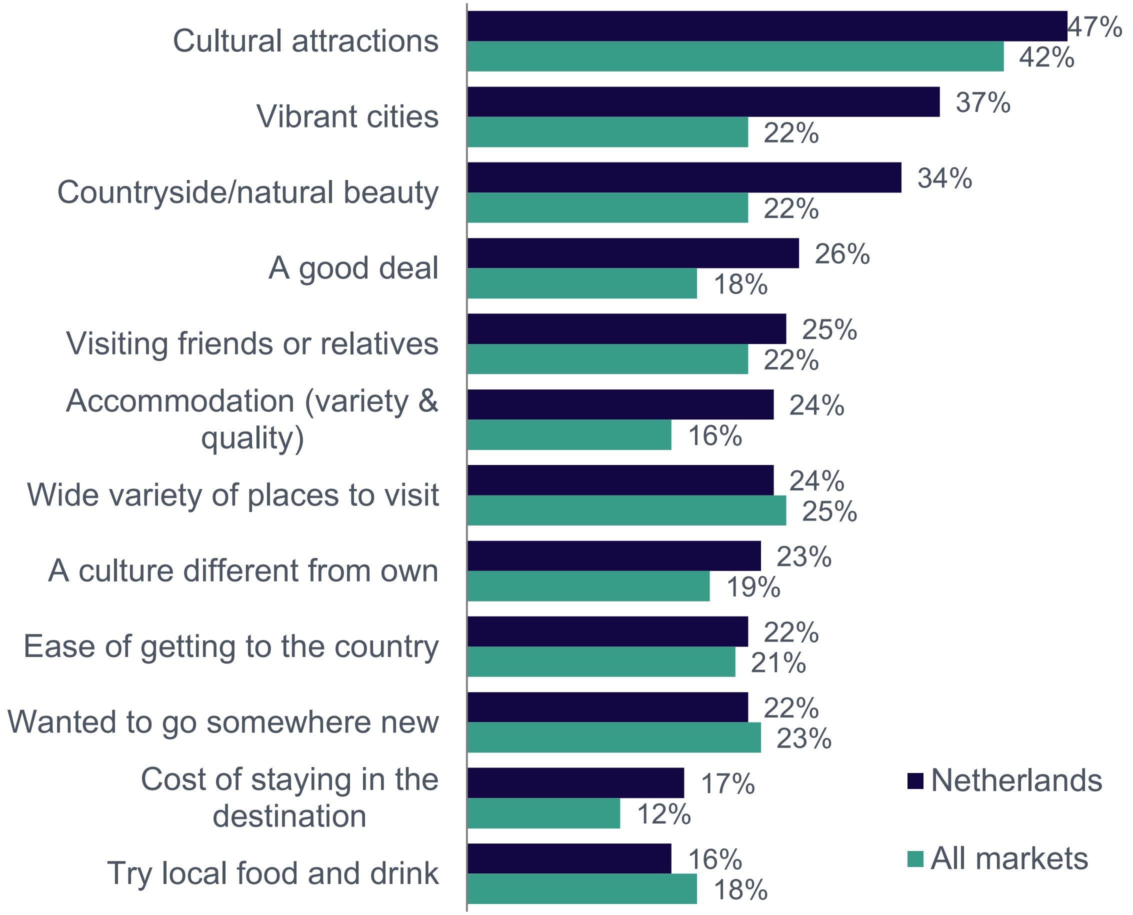
Holiday wants and % saying destination is best place for… bottom 20

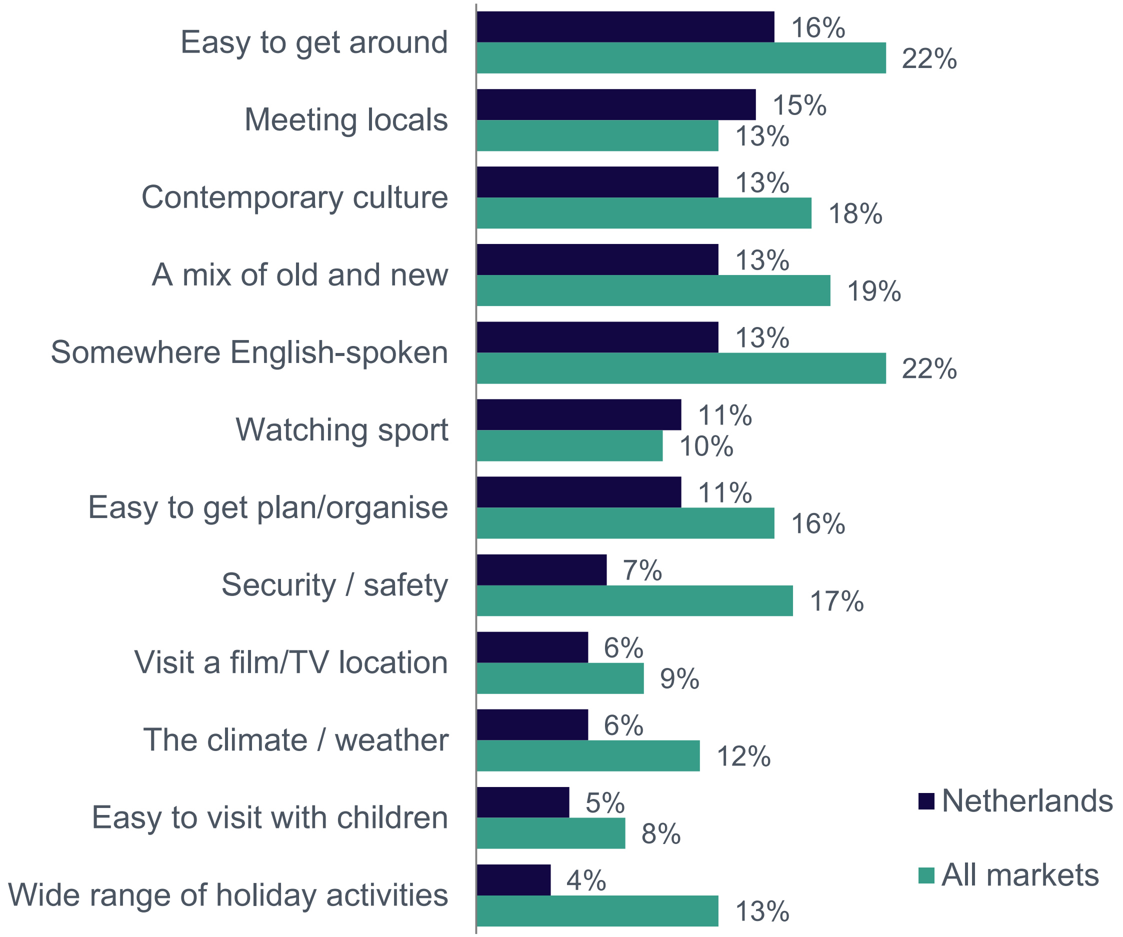
Importance	Perception	GB	FR	IT	AU	US	GE
4.86	Experience activities/places with a wow factor	18%	9%	16%	62%	61%	11%
4.85	Visit a place with a lot of history/historic sites	34%	34%	49%	10%	20%	30%
4.66	A good place to visit at any time of year	15%	20%	20%	36%	36%	17%
4.65	Feel special or spoilt	17%	21%	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

2.3 Perceptions of the UK (6)

Motivations for choosing Britain as a holiday destination





Source: VisitBritain/IPSOS 2016, adjusted data, base: visitors (Market scores have been adjusted so that the sum of all motivations for each market is equivalent to the global total, to enable meaningful comparisons)

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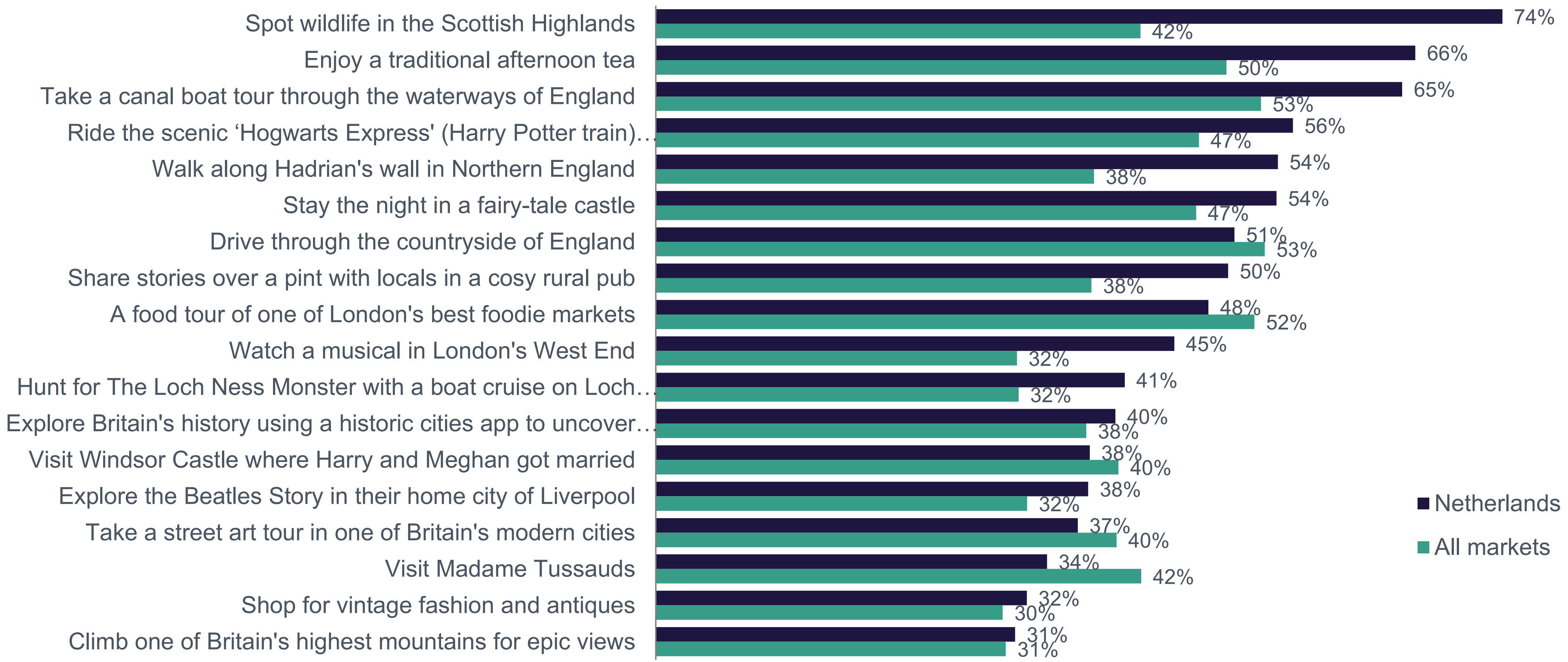
2.3 Perceptions of the UK (7)

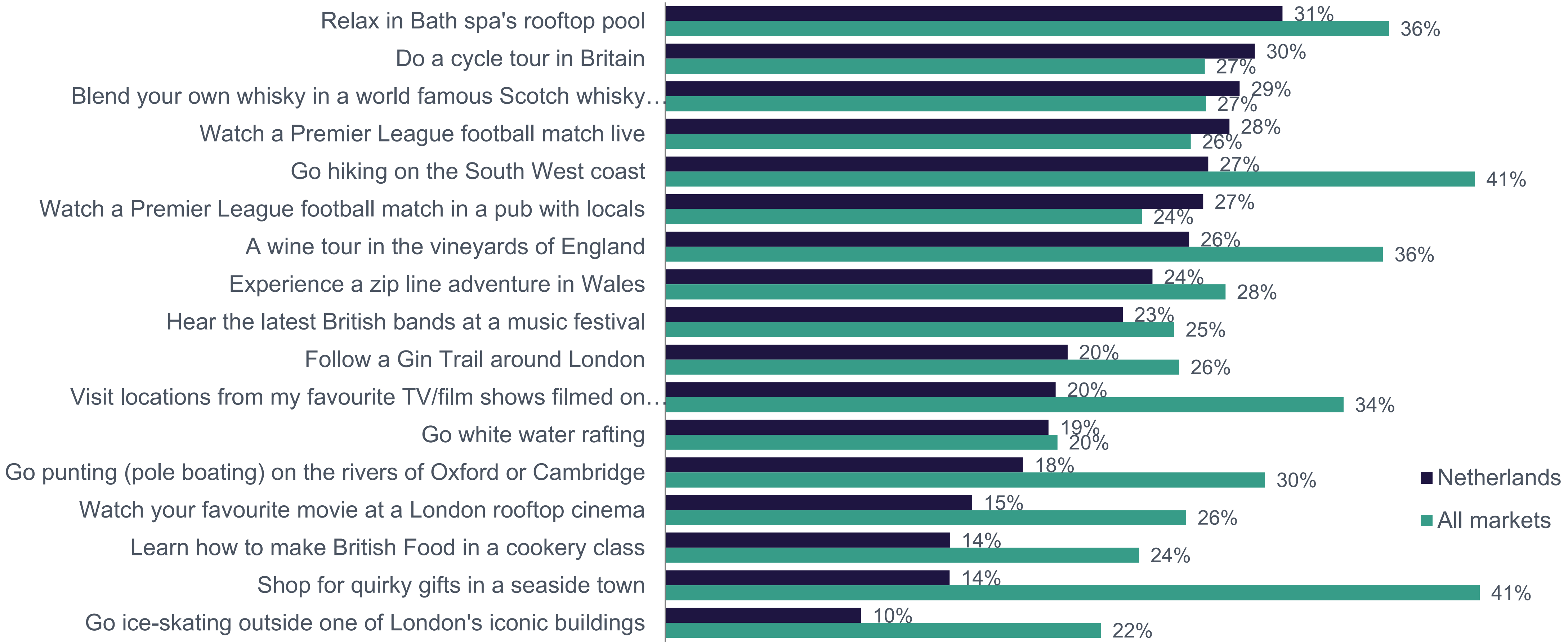
Sought-after Britain activities (top 18)



Source: Anholt Nation Brands Index, powered by Ipsos 2018; Rankings based on market-level scores that have been adjusted so that the sum of all activities for each market is equivalent to the all-market total, to enable meaningful comparisons, including across markets. For full list please see report at www.visitbritain.org/understanding-international-visitors

2.3 Perceptions of the UK (8)

Sought-after Britain activities (bottom 17)



Source: Anholt Nation Brands Index, powered by Ipsos 2018; Rankings based on market-level scores that have been adjusted so that the sum of all activities for each market is equivalent to the all-market total, to enable meaningful comparisons, including across markets. For full list please see report at www.visitbritain.org/understanding-international-visitors

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Understanding the market

Chapter 3

3.1 Structural drivers

- The Netherlands has a population of 17.5 million.
- Like the UK, 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, Friesland, 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.
- 91% 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.

17.5m
Dutch
Population

Source: Oxford Economics, CIA World Factbook 2021

3.1 Structural drivers: general market overview

General Market Conditions

- The Netherlands were the UK's seventh largest source market in terms of visits and tenth most valuable in terms of visitor spending in 2019.
- As of 28 September 2021, Oxford Economics expects the Dutch economy to be on a robust path to recovery which saw a upward revision of GBP growth for the second quarter of 2021 and raised the prospect of 3.8% in growth for the whole year.
- Risks to the downside remain further supply chain disruption, rising inflation and cautious household spending.
- During the COVID-pandemic, the Dutch government installed several support schemes which included a job retention scheme. These had underpinned household consumption. As these measures are phased out at the end of Q3 2021, the unemployment rate is expected to rise slowly.

Key demographic and economic data

Measure (2021 data)	Neth.	Eurozone
Population (m)	17.5	339.8
GDP per capita PPP (US$)	53,241	43,875
Annual average GDP growth over past decade (%)	1.1	0.8
Annual average GDP growth in 2021 (%)	3.8	5.1

Economic indicators (%)

Indicator	2019	2020	2021	2022
Real GDP growth	1.9	-3.8	3.8	3.4
Real consumer spending growth	0.9	-6.6	2.4	6.2
Unemployment rate	4.3	4.8	4.3	4.9

Source: Oxford Economics

3.1 Structural drivers: demographic and social indicators

Population dynamics

Measure	Estimate
Total population (2021)	17.5m
Median age (2019 est.)	43 years old
Overall growth rate (2020-2025)	1.9%

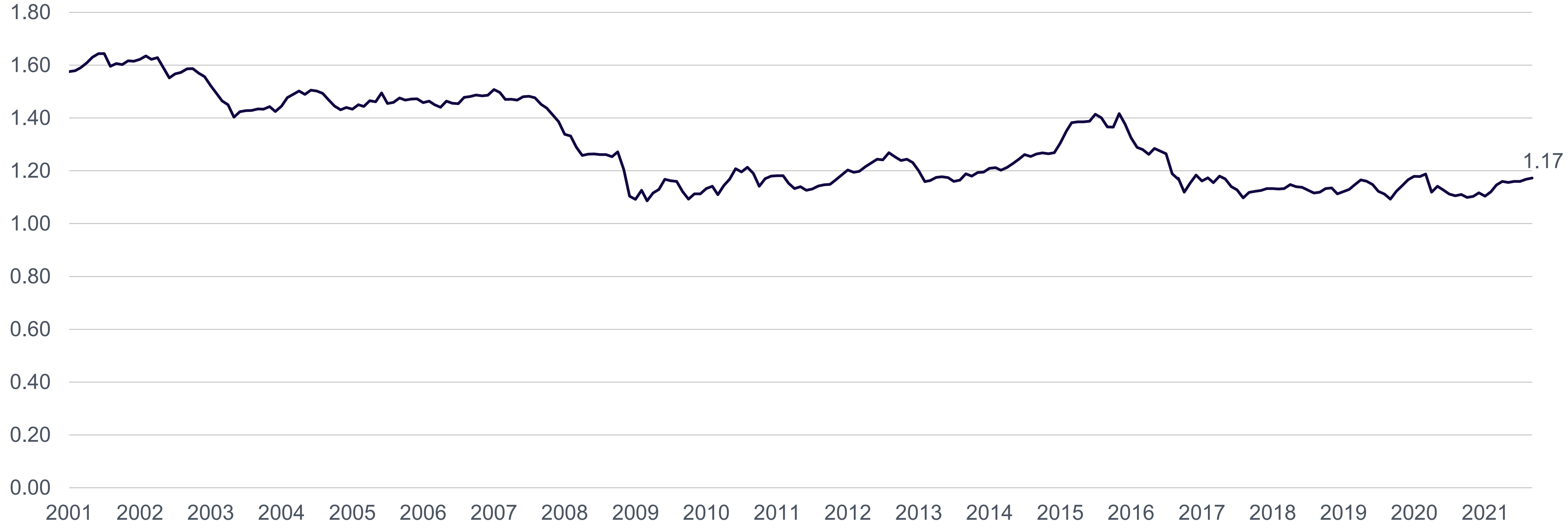
Indicator	2010	2020	2030	2040
Median age (in years)	40.8	43.3	44.7	46.3

- The Netherlands has a population of more than 17 million with a median age of 43 years. The Dutch population is ageing. In terms of median age, the Netherlands ranks globally in 32nd place.
- Most Dutch people are well-educated and enjoy a good standard of living; with real GDP per capita in purchasing power parity terms well above the Eurozone average.
- 91% of Dutch people live in cities (World Bank est.).
- English is taught as the first foreign language in school and linguistic proficiency among Dutch visitors tends to be high.
- According to the Capgemini World Wealth Report 2021 there were 299,000 High Net Worth Individuals (HNWI)* resident in the Netherlands in 2019, up 4% on 2019. It is Europe's sixth largest and globally the 10th largest HNWI population.

Source: Oxford Economics, CIA World Factbook 2020, Statista 2019, World Bank, Capgemini World Wealth Report 2021 *definition in appendix

3.1 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 on our website.

Source: Bank of England

3.2 Consumer trends

- The Dutch took 28.7 million holiday trips in 2020, 30% fewer than in 2019 where it had exceeded 40 million as a result of the COVID-19 pandemic. The volume of holiday trips abroad was particularly affected as the Dutch stayed closer to home which increased the popularity of trips within Europe and triggered a boom of staycations and a shift of perceptions about taking a holiday in one's own country.
- Holidays in the Netherlands experienced new heights of popularity in 2020 increasing to 10.5 million such trips (up 6% on summer 2019), with more pre-booked accommodation in comparison to the previous year and plans often confirmed at short notice.
- Nonetheless, the third wave of VisitBritain's international recovery sentiment tracking research reveals: 83% of the Dutch considered taking an international leisure trip in the next 12 months (fieldwork 23th August – 6th September 2021), showing the strongest desire to travel since the start of the tracker. Of them, 75% are considering Europe and 10% Britain. Short notice bookings and avoiding crowds are still very prevalent shifts in behaviour. Together with the COVID-19 situation, flexibility like money-back guarantees is a consideration.
- More than half (53%) of the Dutch state that they will think more about sustainability and the environmental impact when planning a future holiday.

83%

of the Dutch are keen to travel internationally in the next 12 months

Sources: CVO NBTC-NIPO 2021 reporting on calendar year 2020, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published October 2021, NB: Sentiment data is from a tracking study, and results may change in subsequent waves

3.2 Consumer trends: overall travel trends (1/2)

Travel trends and attitudes towards holidays

- Based on CVO reported by CBS, the Dutch took 28.7 million holiday trips in 2020, 30% fewer than in 2019 where it had exceeded 40 million. Consequently, consumer spending on holidays reached 10.3 billion euros in 2020, down from 22.5bn euros in 2019. The decrease in spending affected summer holidays in particular.
- The volume of Dutch holidays abroad fell to 11.7 million, down 11.2 million compared to 2019. 17 million of the Dutch took a staycation.
- Holidays in the Netherlands experienced new heights of popularity in 2020 increasing to 10.5 million such trips (up 6% on summer 2019), with more pre-booked accommodation in comparison to the previous year and plans often confirmed at short notice. The share of nights spent in hotels and holiday homes increased by 30% and 11% respectively, but the highest increases were recorded for holidays with a camper (up 68% to over 140,000 such holiday trips. Accommodation for groups saw the strongest declines. ANWB reports that there are now about three million active campers, one million more than before the COVID-19 pandemic, as the Dutch rediscovered this holiday form and its ability to cater for the need for flexibility and peace and quiet as well as space.
- While staycations boomed in summer 2020, summer holidays abroad fell sharply in the same season to only 4.4 million (compared to 13.7 million in summer 2019). Most of these trips were made to a European destination; Western Europe was especially popular.
- The COVID pandemic has triggered a shift in the way the Dutch think about their holidays. More than half of the Dutch now say that they look differently about the details of future holidays, especially when it comes to safety and security which are now more important than before. Avoiding crowds, staying closer to home and travelling post pandemic are key considerations. The perceptions of taking holidays in the Netherlands has particularly improved as two in five Dutch people expect to spend their summer holiday/ their main holiday in their own country more often in future.

Source: CVO NBTC-NIPO 2021 reporting on calendar year 2020, ANBW 2021

3.2 Consumer trends: impact of COVID-19

The impact of COVID-19 on Dutch travel behaviour

- 2020 saw an estimated 68% year-on-year decline in volume and 69% decline in value of visitation from the Netherlands to the UK as a result of the COVID-19 pandemic.
- The third wave of VisitBritain's international recovery sentiment tracking research reveals: 83% of the Dutch considered taking an international leisure trip in the next 12 months (fieldwork 23th August – 6th September 2021), showing the strongest desire to travel since the start of the tracker. Of them, 75% are considering Europe and 10% Britain.
- Britain ranks 4th for consideration of the Dutch hoping to go on a European leisure trip, behind Spain, France, and Germany, ahead of Italy, Belgium and Greece.
- As of summer 2021, 63% of the Dutch will still look to avoid crowds even if they could miss must-see attractions and they intend to book last minute. Once vaccinated, 62% aim to travel internationally and three in five are happy to take a pre-trip COVID test if required. More than half of the Dutch think of booking through a travel agent as a safer option. Travel concerns of around seven in ten of the Dutch mostly centre around the worry that others around them may not follow COVID-19 policies/procedures and the extra admin involved with new policy/rules during the trip. Access to healthcare is a key concern.

Key activators for an international leisure trip	Netherlands	All markets
Money-back guarantee should one wish to cancel the trip	39%	35%
Removal of quarantine policies in destination country	32%	28%
Decrease in coronavirus cases at destination	26%	31%
An attractive offer e.g. discounts on flights or accommodation	23%	25%
Insurance for COVID-19 related travel/regulation changes	22%	25%

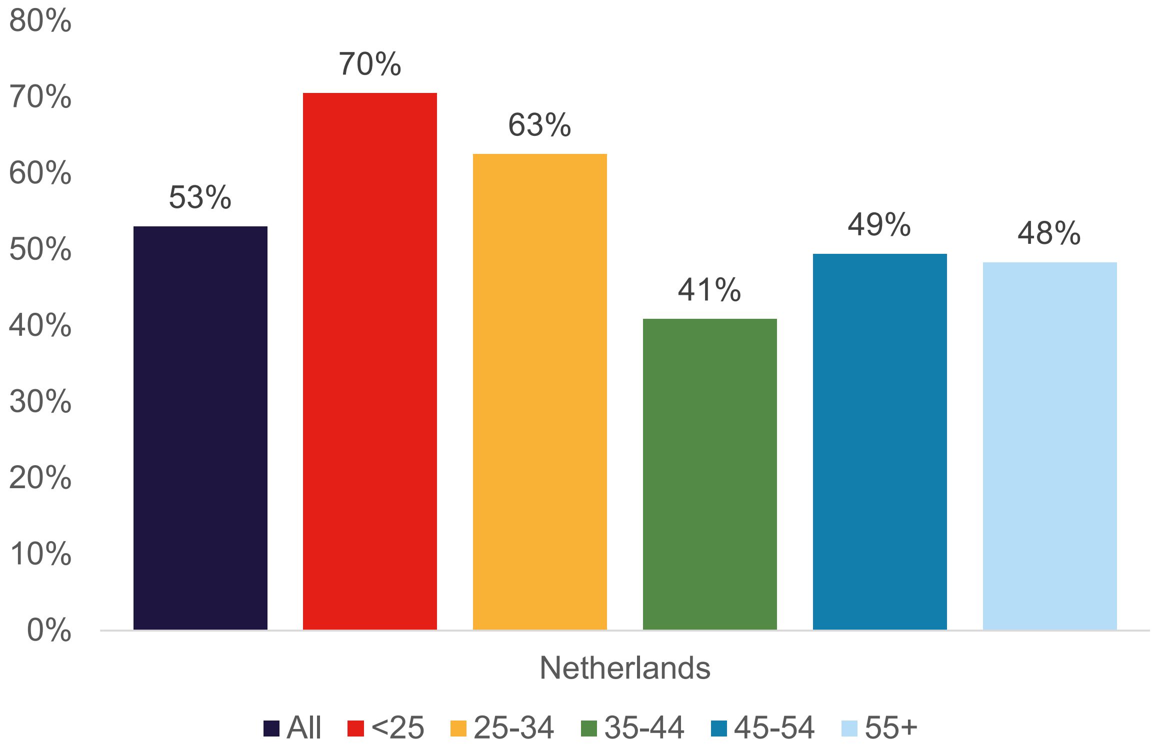
Source: Oxford Economics/VisitBritain, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published October 2021, NB: Sentiment data is from a tracking study, and results may change in subsequent waves

3.2 Consumer trends: sustainability

Travel trends – sustainability is an increasingly key consideration for holiday planning and behaviour

- More than half (53%) of the Dutch state that they will think more about sustainability and the environmental impact when planning a future holiday. The youngest age groups show the strongest intention to change their behaviour.
- Tracking the environmental impact of their action is something that many Dutch are interested in. In spring 2021, more than three in five of Dutch responded that they would be interested in an app to track their personal carbon footprint to understand their impact on the environment.
- When surveyed in spring 2020, more than half of the Dutch expressed a propensity to buy from companies which work to reduce climate change. Only 14% of the Dutch stated that they had already chosen an alternative method of transport to avoid flying for environmental reasons but a further 30% who had not previously done this, are interested in taking this action in the future. 44% of respondents resident in the Netherlands are consciously trying to minimise their use of plastic to help the environment.
- While 46% of the Dutch currently are most comfortable using their own car to travel, many also feel confident to use public transport in Britain, most notably more than two in five would consider taking the train.

Share of the Dutch who now think more about sustainability and the environment in their future holiday planning by age group*



Sources: TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published October 2021, NB: Sentiment data is from a tracking study, and results may change in subsequent waves; Foresight Factory spring 2020 and 18th February - 15th April 2021; **The base for individual age groups may be small

3.3 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.
- Almost half of Dutch visitors book tickets/passes for attraction during their visit to the UK. They have a low propensity to pre-book such services.
- In general, the gap between early and late bookers in the Dutch market is widening recently with many now booking within few weeks of their departure. This pre-COVID trend is not only true for short-haul travel within Europe but also applies to long-haul travel.
- Most recently, the COVD-19 pandemic has triggered a majority of the Dutch to favour last minute bookings as Zoover Holiday and VisitBritain and partners' consumer sentiment tracking confirm.

68%

of Dutch visitors started thinking about their trip 3 or more months before their arrival in Britain

Source: VisitBritain/IPSOS 2016; TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published October 2021; Zoover Holiday

3.3 Booking and planning: booking channels and ticket sales (1)

How trips to Britain were booked

Booking method	Neth.	All markets
Online	93%	85%
Face-to-face	2%	10%
By phone	3%	4%
Don't know	2%	1%

- 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 27%.

How trips to Britain were booked: accommodation only

Booking method	Neth.	All markets
Online	72%	70%
Face-to-face	6%	7%
By phone	0%	3%
Did not book/stayed with friends/relatives	20%	17%
Don't know	2%	2%

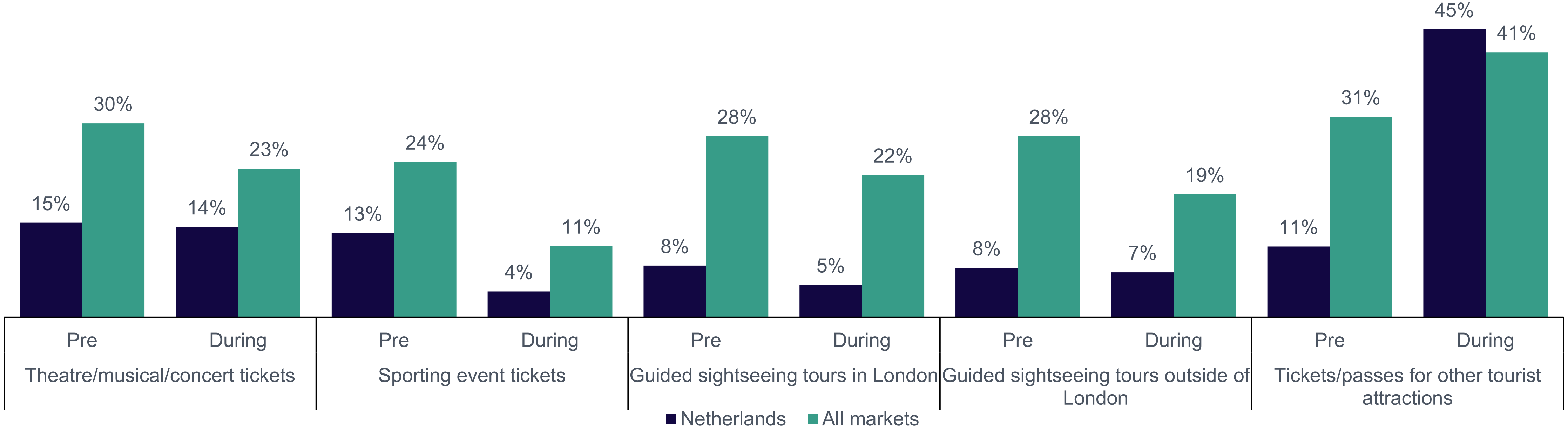
How trips to Britain were booked: travel + accommodation

Booking method	Neth.	All markets
Online	80%	64%
Face-to-face	10%	27%
By Phone	6%	8%
Don't know	4%	1%

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

3.3 Booking and planning: booking channels and ticket sales (2)

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. 15% book theatre/musical/concert tickets prior to the trip, which was the highest proportion of any pre-booked item for the Dutch, but well below the all-market average of 30%.
- During the trip: 14% of Dutch visitors purchased tickets to theatre/musical/concerts; nearly half bought tickets/passes for miscellaneous tourist attractions.

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

3.3 Booking and planning: lead-times (1)

Decision lead-time for visiting Britain

Starting to think about trip

Lead time	Neth.	All markets
6+ months	32%	45%
3-6 months	36%	31%
1-2 months	18%	13%
Less than 1 month	9%	5%
Don’t know	6%	3%

Deciding on the destination

Lead time	Neth.	All markets
6+ months	18%	32%
3-6 months	42%	38%
1-2 months	22%	19%
Less than 1 month	11%	7%
Don’t know	8%	3%

Looking at options/prices

Lead time	Neth.	All markets
6+ months	9%	21%
3-6 months	38%	37%
1-2 months	30%	27%
Less than 1 month	16%	12%
Don’t know	8%	4%

Booking the trip

Lead time	Neth.	All markets
6+ months	7%	14%
3-6 months	29%	32%
1-2 months	29%	28%
Less than 1 month	27%	21%
Don’t know	9%	5%

Source: VisitBritain/IPSOS 2016, base: visitors

3.3 Booking and planning: lead-times (2)

Decision lead-time for visiting Britain

- 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. Almost 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.

Dutch travellers are more likely to make their booking closer to the departure than the all market average

Source: VisitBritain/IPSOS 2016, base: visitors

3.4 Reaching the consumer

- The most influential source for destination choice for Dutch visitors to Britain 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, 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.
- Looking at influences on destination choice by the Dutch overall, photos seen on social media come out as most important and recent studies suggest that many people now take holiday tips on Facebook, Instagram and blogs more seriously than suggestions from friends and family. Search engines remain the key source for additional information and price comparisons.
- Prior to the pandemic, the Dutch spend on average 8.5 hours per day on media. On-demand viewing has again risen sharply, as well as smartphone use. A third of reading time now takes place on screen, two thirds via paper sources.

Information from search engines
#1 Influence for the destination choice of Dutch visitors to Britain

Source: VisitBritain/IPSOS 2016, Media Tijd April 2019

3.4 Reaching the consumer: broadcast media, radio and papers

Broadcast media

- The Dutch watch an average of 3 hours and 5 minutes of films, series and videos per day. Traditional television is still popular, but the Dutch watch more and more 'on demand': on average, this is now 58 minutes a day (up from 38 minutes just three years ago). Watching on demand is particularly true for online/streaming/ downloading video services (like e.g. Netflix, Disney or Prime) and watching short videos on services such as YouTube.
- Travel shows on Dutch TV are slowly coming back after the COVID pandemic. The main ones are: 3 op Reis, Reizen Waes, Floortje naar het einde van de Wereld, Rail Away.

Radio

- On average, the Dutch listen to the radio for about two hours a day (1 hour and 53 minutes). They listen to their own music for 15 minutes a day and to music via the internet, for example via a streaming service such as Spotify, for an average of 19 minutes.

Newspapers

- Compared to three years ago, the average reading time has remained level at 42 minutes. There is a trend to read more and more digitally: on average 14 minutes a day (an increase from 12 minutes in 2015).
- Men have a slightly higher propensity to read more digitally: this is mainly because they use news sites and news apps more often. Women read books and magazines more often.
- There are 9 national newspapers in the Netherlands. De Telegraaf has a reach of 1,150,000, de Volkskrant 660,000, NRC has a reach of 437,000. Trouw has 282,000, Reformatorisch Dagblad 147,000, FD 136,000 and Nederlands Dagblad 110,000. The reach of the free daily Metro is 800,000. In addition, there are 18 regional papers; many of them have local editions of the paper.

Source: TBO by Sociaal Cultureel Planbureau; Media Tijd April 2019

3.4 Reaching the consumer: magazines and online media

Magazines

- The challenges of publishing a magazine in today's media market are having a big impact on the Dutch media landscape. Many big titles like Vogue, Glamour and Esquire ceased their activities in 2020. Some magazines made a shift to online only. It's mainly special interest magazines that manage to keep their audience.
- Top Dutch travel magazines are National Geographic Traveler (circ. 50,000), Lonely Planet Traveller (circ. 30,000) and Columbus Travel (circ. 29,000).

Online media

- Social media use increased further during the COVID-19 pandemic. In line with the growth of the past few years, more Dutch people started using social media. 13.7 million Dutch people aged 15 and older are active on social media; a further increase on 13.5 million in 2020 and 13.3 million in 2019.
- Young people say they spend more than 15 minutes a day on social media in 2021 than in 2020. In total, social media users spend an average of 160 minutes per day on it, compared to the average of all Dutch people of 97 minutes per day.
- Both the number of platforms used and the number of platforms used daily are increasing considerably. On average, we use 4 platforms, 2 of which on a daily basis. This number is considerably higher among those aged 15-19 years and 20-39-year-olds, who use an average of 5.1 and 5 platforms respectively.

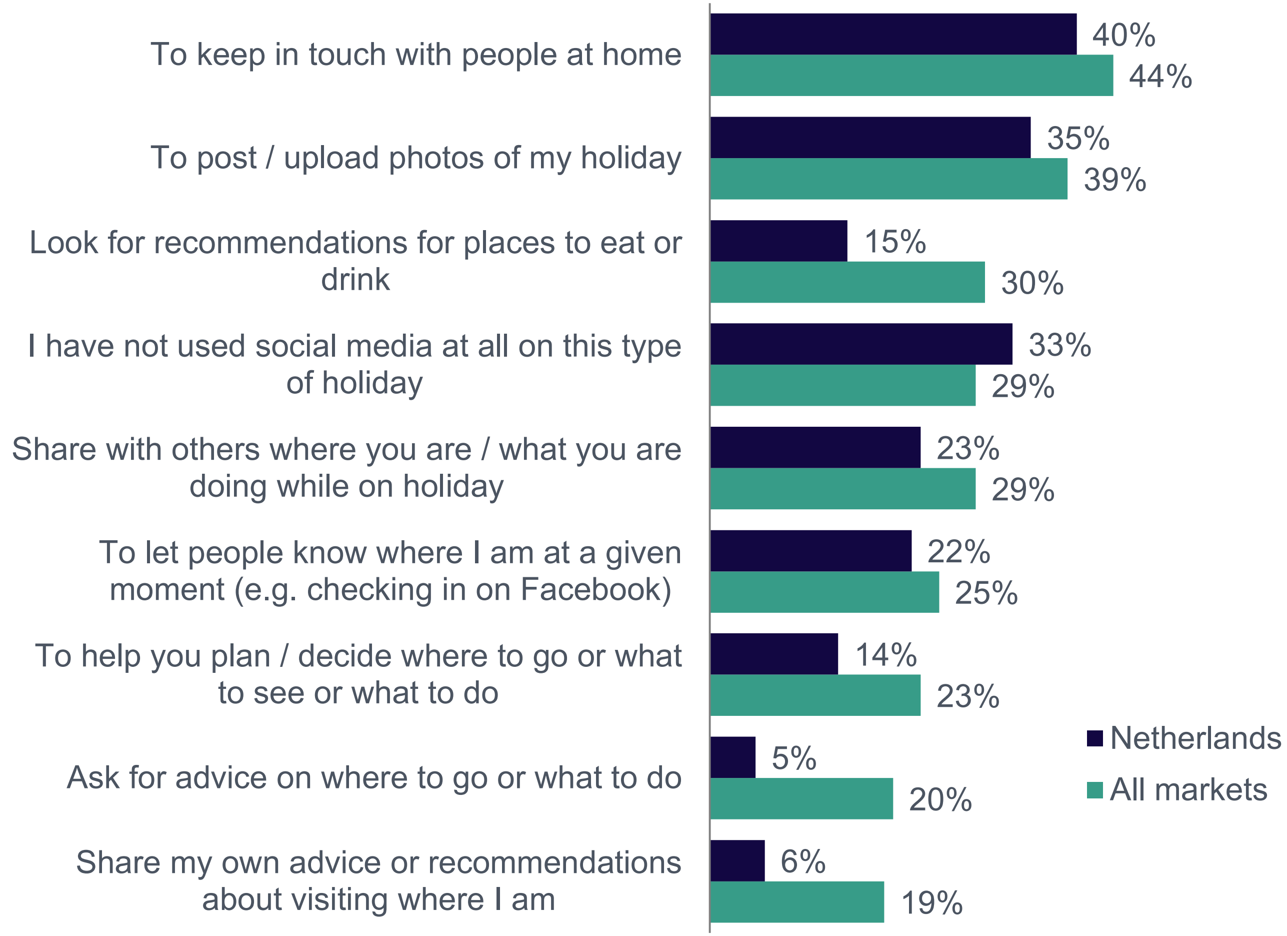
Media trends

- Media is mainly consumed online these days: In 2019, 12% of the Dutch read news media only in paper format, 43% both on paper and digitally and 24% only digitally. Young people, in particular 18 to 34 year olds, often only consume papers digitally.
- Shopping via social: In 2020, the Dutch shopped a lot online. The COVID-19 pandemic had, and still has, a great impact on their shopping behaviour but online shopping is also becoming easier and safer which underpins the trend further.
- Influencer marketing remains a successful tool in the marketing mix and continues to grow.
- Social advertising: organic reach is dropping. Anyone who wants to be visible will therefore have to adjust the type of content. Another way to increase visibility is advertising on social media, something that more and more companies are including in their social media strategy. In 2021, social advertising is still a good way to win back your place in the algorithm.

Source: TBO by Sociaal Cultureel Planbureau; Media Tijd April 2019

3.4 Reaching the consumer: social media on holiday

Use of social media on holiday

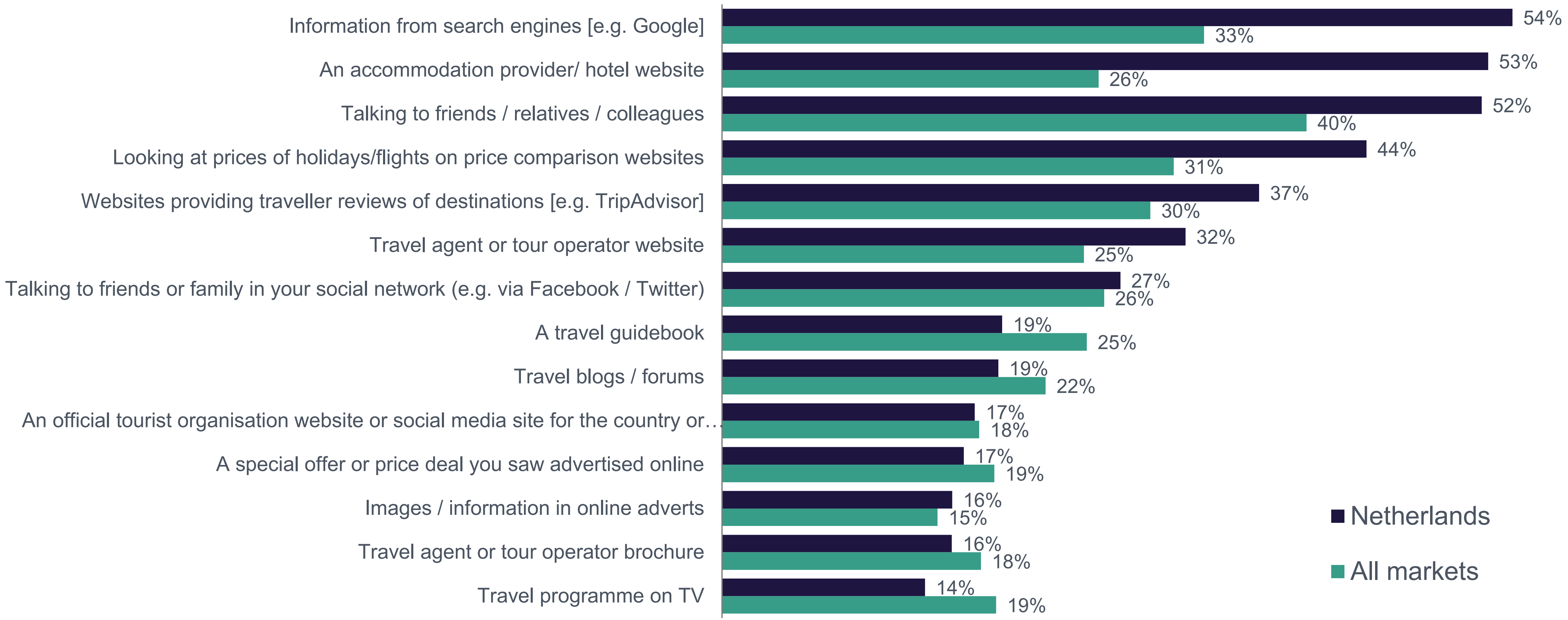


- The social media platforms most used in the Dutch market are WhatsApp, Facebook, Youtube, Instagram, LinkedIn, and Pinterest, followed by Twitter, Snapchat and TikTok.
- 40% like to keep in touch with people at home and 35% like to post/upload their holiday photos.
- 62% like to stay connected whilst 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)?, Statista January 2021

3.4 Reaching the consumer: influences (top 14)

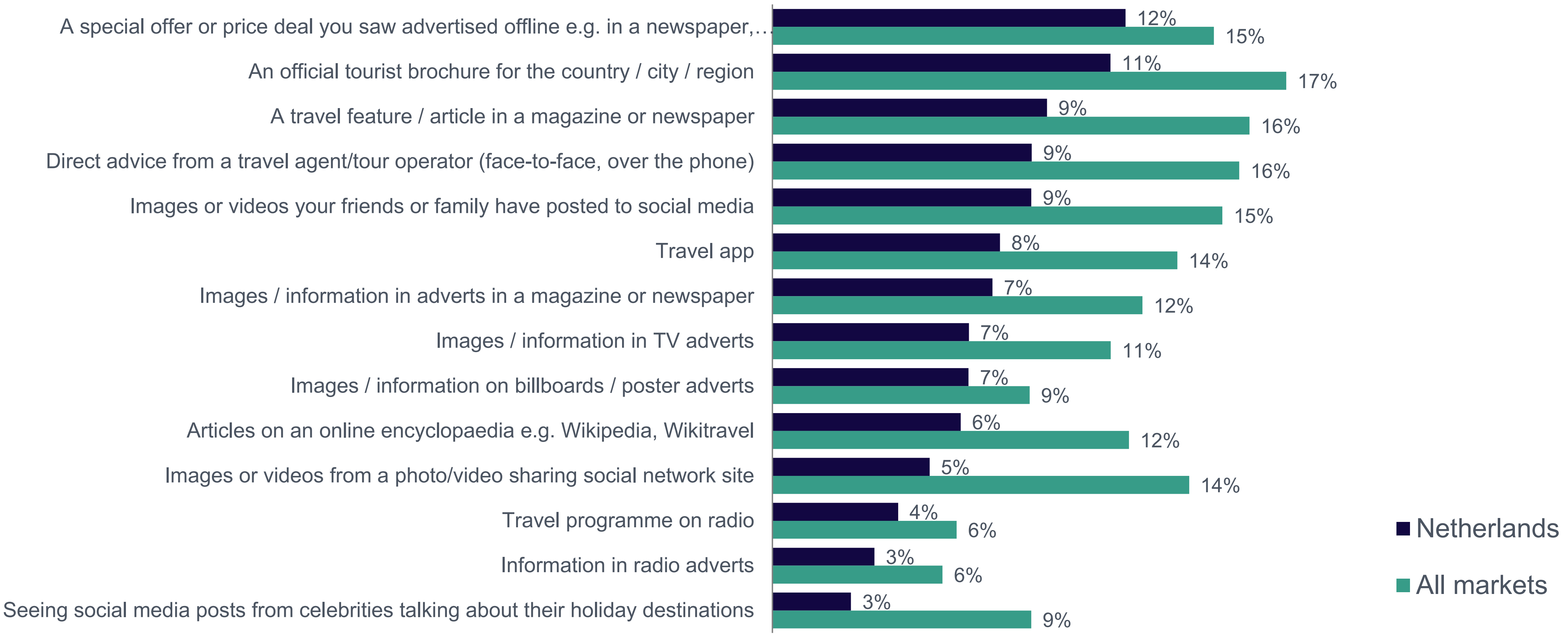
Influences on destination choice – top 14



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)

3.4 Reaching the consumer: influences (bottom 14)

Influences on destination choice – bottom 14



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)

Access and travel trade

Chapter 4

VisitBritain/ Guy Richardson

4.1 Access: key facts

- 59% of Dutch visitors travel to the UK by plane. It is a short non-stop flight: usually 1-1.5 hrs flight time.
- 25% of Dutch visits came to the UK over the Channel, i.e. by ferries, with 69% of those who chose this mode of transport bringing a private vehicle (2019). 16% of visits are made via the Channel Tunnel, also boosted by the non-stop Amsterdam to London Eurostar service.
- The pace of growth in annual aircraft seat capacity from the Netherlands to the UK has slowed to more modest levels recently with growth from 2018 to 2019 at 2%. The strongest growth was seen during the period of recovery from the financial crisis years up to 2017. Due to COVID-19, capacity declined by 63% in 2020 on 2019 with the effects of the pandemic also felt strongly in Channel Tunnel and sea traffic.
- 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 UK.
- The small annual share of some regional airports can be due to seasonal connectivity e.g. only included in the summer schedule.

The majority of Dutch visitors travel to the UK by plane.

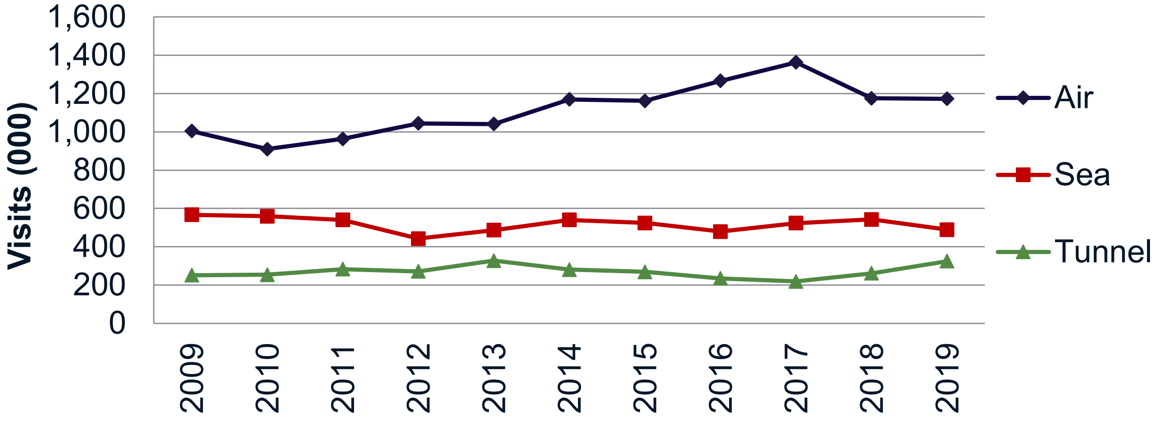
Access to Britain

Measure	2019
Weekly aircraft departures	966
Weekly seat capacity	129,148
Airports with direct routes in the Netherlands	5
Airports with direct routes in Britain	26
Weekly ferry crossings	27
Non-stop Eurostar trains per day to Amsterdam	3

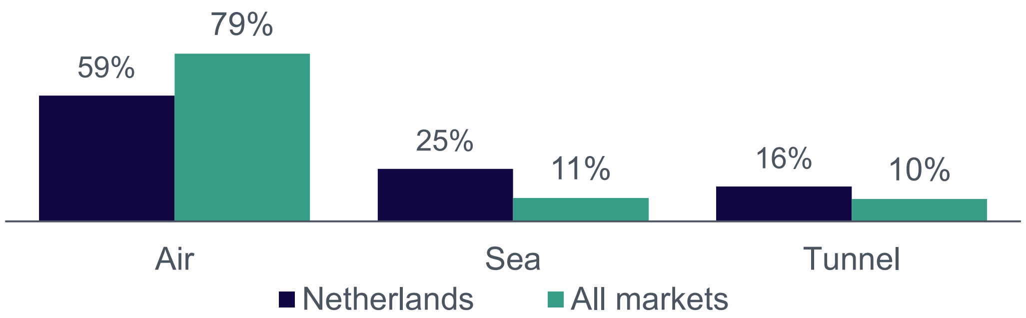
Source: Apex, non-stop flights only, International Passenger Survey by ONS, Eurostar 2019, Direct Ferries 2019

4.1 Access: mode of transport

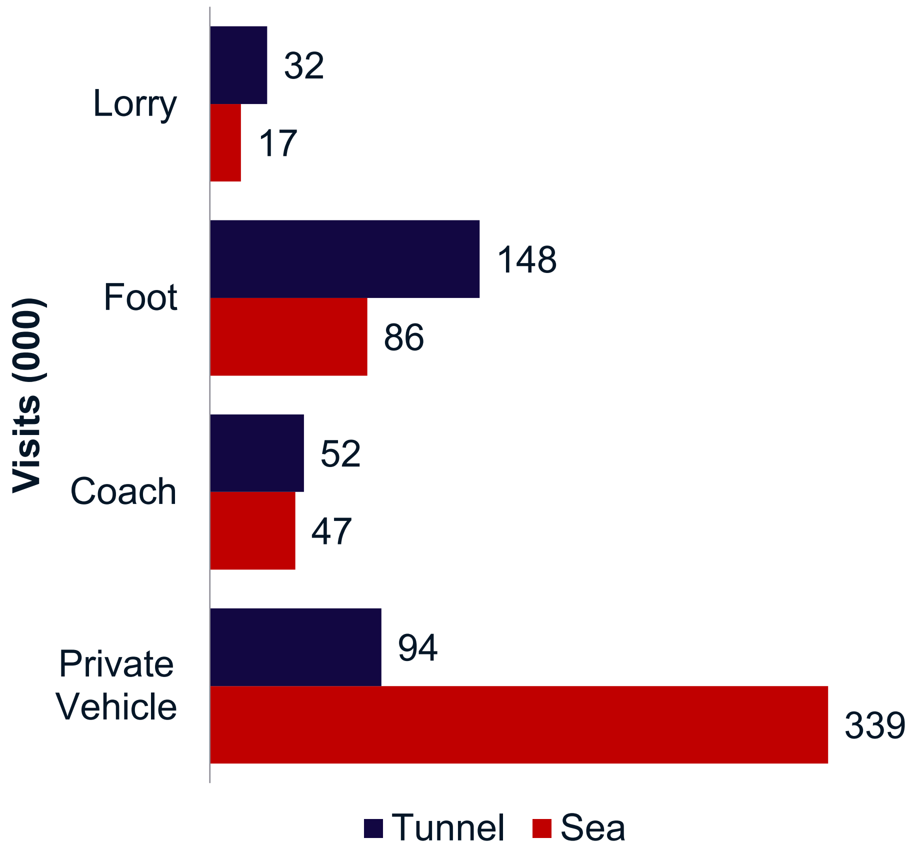
Visits by mode of transport



Annual share by mode (2019)



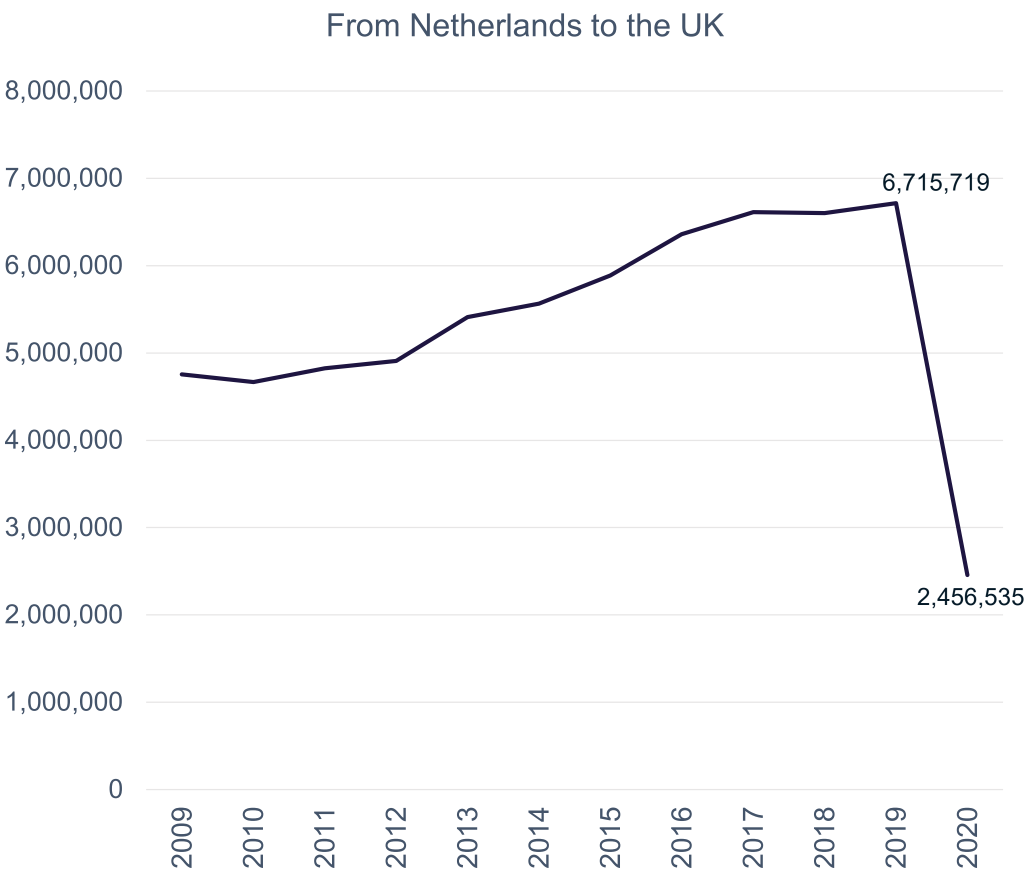
Sea and tunnel travel (000s) in 2019



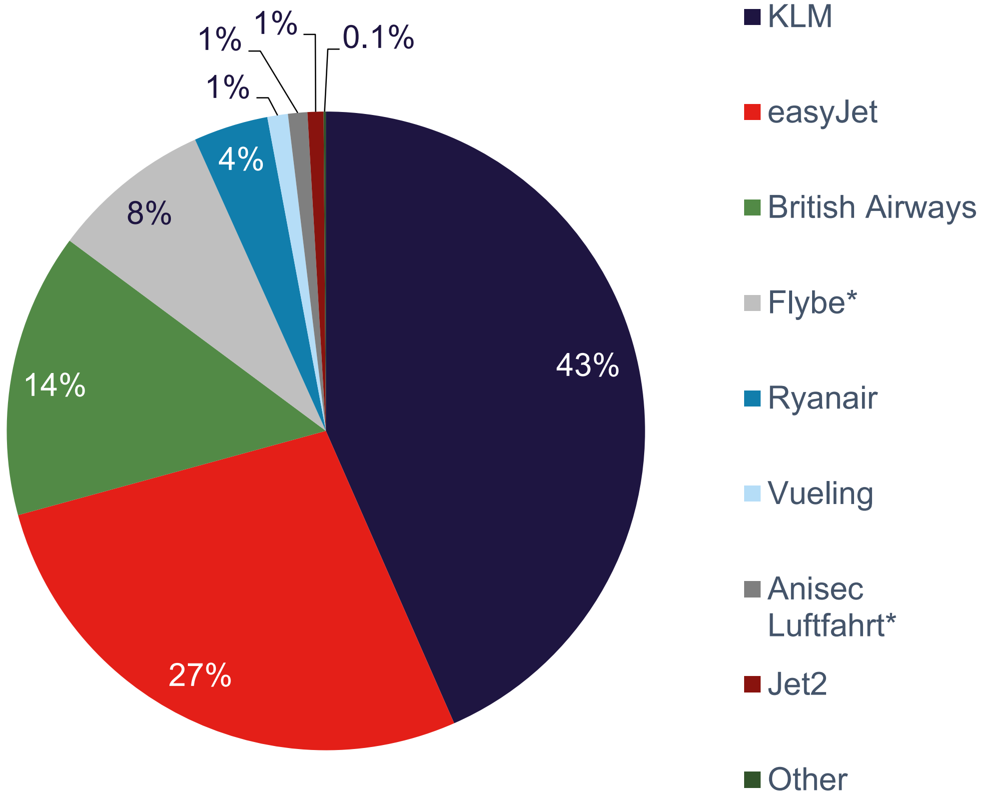
Source: International Passenger Survey by ONS

4.1 Access: capacity (1)

Annual airline seat capacity trends



Airline seat capacity by carrier (2019)

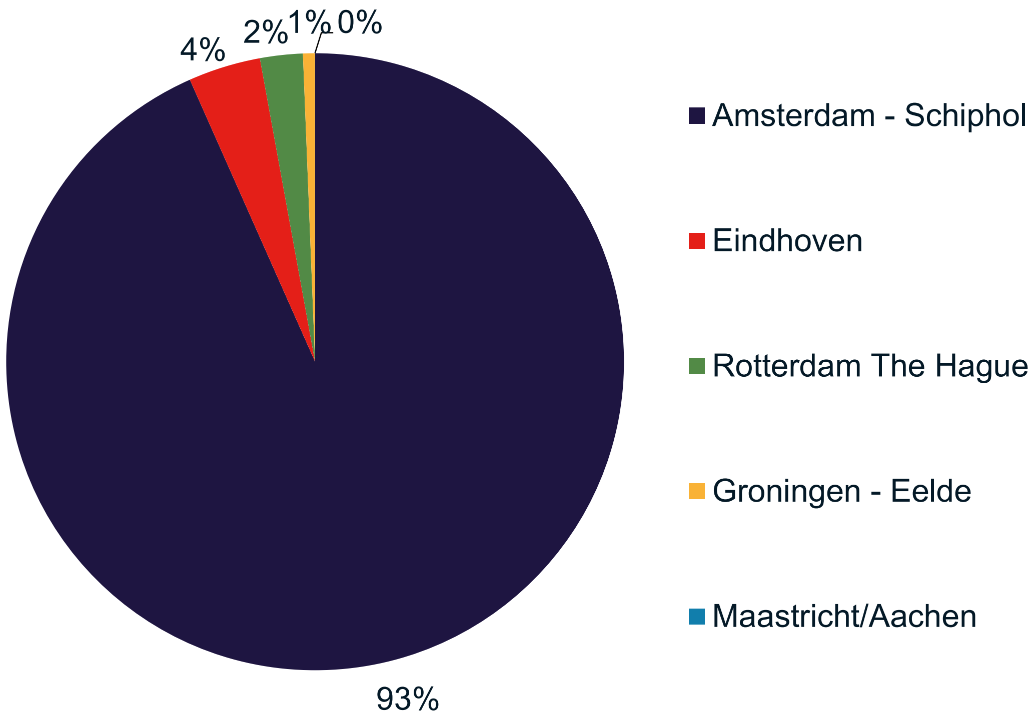


Note: please read the pie chart clockwise

Source: Apex, non-stop flights only. Other groups: Air Antwerp, Corendom Dutch Airlines and TUIfly Belgium.
NB. Flybe went into administration in early March 2020; Anicsec Luftfahrt rebranded to Level Europe in 2019 and ceased short-haul operations in June 2020 including flights from Amsterdam.

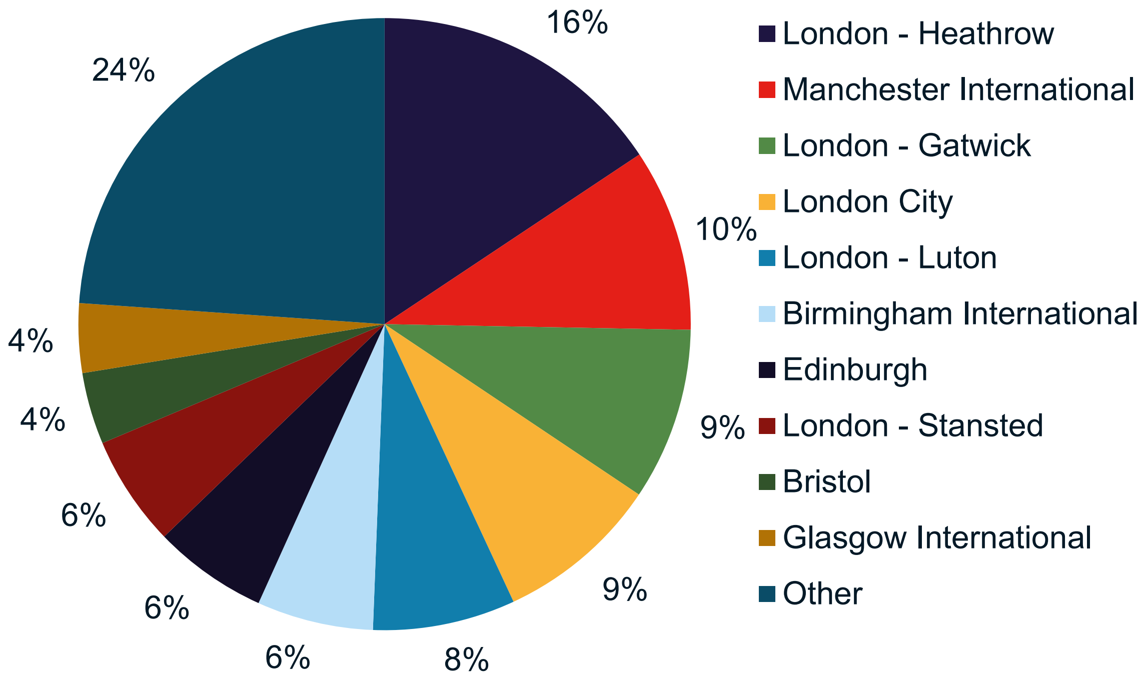
4.1 Access: capacity (2)

Origin airport annual seat capacity (2019)



Note: please read the pie chart clockwise

Destination airport seat capacity (2019)



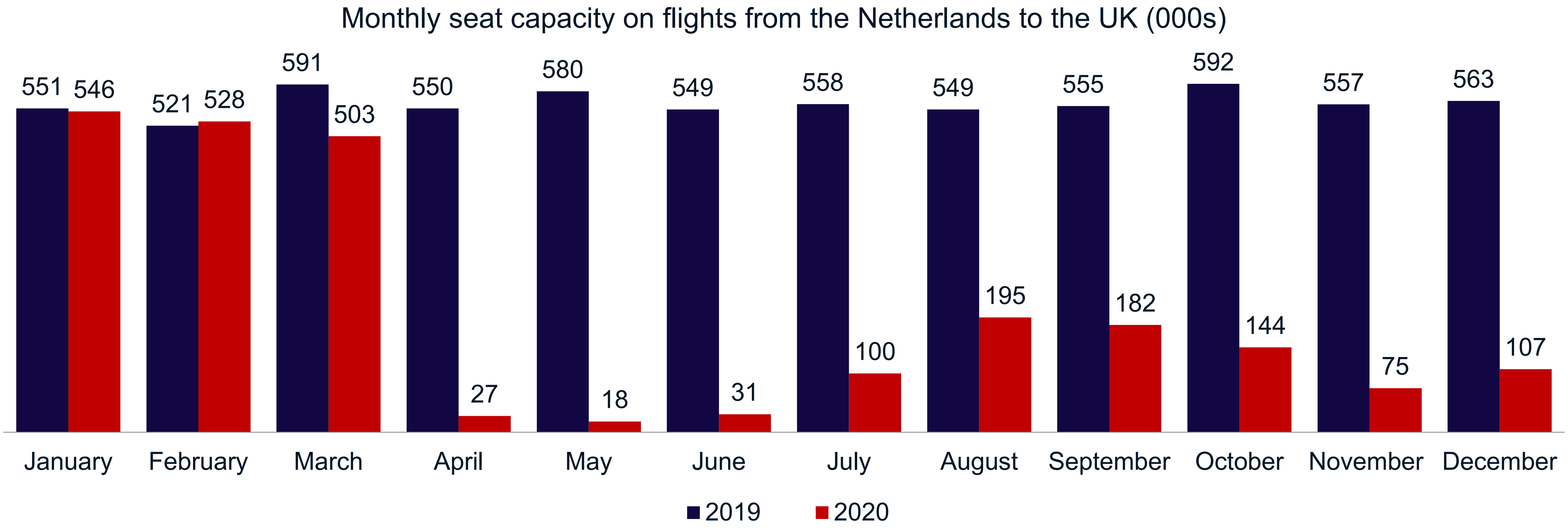
Note: please read the pie chart clockwise

Other in destination airports groups: Newcastle, Aberdeen, London Southend, Leeds/Bradford, Liverpool John Lennon, Southampton, Norwich, Cardiff, Humberside, Durham Tees Valley, Belfast International, Inverness, Exeter International, Belfast City, East Midlands, and Doncaster Sheffield.

Source: Apex, non-stop flights only.

4.1 Access: impact of the COVID-19 pandemic

Impact of the COVID-19 pandemic on connectivity



- Seat capacity on non-stop flights between the Netherlands and the UK declined by 63% in 2020 compared to 2019 as a result of the COVID-19 pandemic. The impact was felt most from April 2020, and hardly any capacity was flown between April and June, until it picked up slightly for the summer months but recovered only to about -64% of 2019 levels in August.
- The effect of the pandemic was also felt severely in Channel Tunnel and sea connectivity.

Source: Apex, non-stop flights only.

4.2 Travel trade: general overview (1)

- 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.
- For Britain a range of smaller and specialist operators are also important.
- 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 feature 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

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

Source: VisitBritain Office Netherlands

4.2 Travel trade: Dutch tour operators (2/2)

Top ten operators in the Netherlands in 2019

Top Ten Tour Operators	Turnover 2019 €m	Pax 2019
TUI Nederland	1.368	1,755,248
Corendon	637	782,000
Sunweb Group	420	585,000
ANWB reizen groep	192	218,851
Oyo Vacation Homes	175	Unknown
Vacansoleil	98	488,000
Viabus (Bolderman/Effeweg)	77	150,000
E-hoi (Cruisewinkel/Zeetours)	73	Unknown
De Jong Intra vakanties	71	157,213
Bookit/Weekendjeweg	66	unknown

Major tour operators with a Britain programme are:

Source: TravMagazine Top 50 December 2020, NB. Thomas Cook ceased trading in 2019

4.2 Travel trade: Dutch holidays

National public holidays:

Date 2022	Date 2023	National Holiday
1 January	1 January	New Year's Day
15 April	7 April	Good Friday
18 April	10 April	Easter Monday
27 April	27 April	King's Birthday
5 May	5 May	Liberation Day
26 May	28 May	Ascension Day
6 June	29 May	Whit Monday
25 December	25 December	Christmas Day
26 December	26 December	Boxing Day

Source: Government of the Netherlands

4.2 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.

4.2 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:

- Many Dutch Tour operators are working from home or started with hybrid working. So please check if your contact wants to meet in real life and where would be the best location.
- Provide the operators you are visiting with a comprehensive information pack about your products, ideally in advance so they can prepare for the meeting. They like to go through all information thoroughly and it is important that any questions are answered transparently and timely.
- 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.

4.2 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. Alternatively, many restaurants also accept UK debit cards.
- 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 a full Euro amount. A rule of thumb is to add roughly 5-10%.

4.3 Caring for the consumer

Advice on caring for Dutch consumers

- The Dutch tend to be sceptical about traditional British cuisine. However, Celebrity Chefs (Jamie Oliver, Gordon Ramsay, 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. 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; 7% of nights spent in the UK in 2019 were spent in camping accommodation and 11% in rented flats/houses.
- Complaints from Dutch visitors should be resolved promptly.

Source: International Passenger Survey by ONS

Useful links and further information

Appendix

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Appendix 1: Working with VisitBritain (1)

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 partnering to host journalists, influencers, and broadcast shoots
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Retailing your product through the VisitBritain shop
- Joining the Tourism Exchange GB platform – giving you access to a wide range of international customers, via connected distributors. Connection to the platform is free.
- 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 or trade website

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)

or VisitBritain shop team
(Email: product@visitbritain.org)

Appendix 1: Working with VisitBritain (2)

VisitBritain's strategy to grow tourism to 2025

- **Developing world-class English tourism product:** VisitBritain has collaborated with VisitEngland to develop and deliver the **Discover England Fund** since April 2016
- **Collaborating globally:** VisitBritain's network extends in four regions: Europe, the Americas, APMEA and North East Asia. Meet those teams and their trade partners at VisitBritain's different trade events, VIBE, ExploreGB, or Destination Britain events in market.
- **Inspiring the world to explore Britain** as a **GREAT Britain** campaign partner and through our global and regional marketing campaigns.
- **Acting as trusted partner and advisor** to the industry, but also our Government and Public Diplomacy partners by generating and offering them world-class market insights.

VisitBritain also develops and promotes products for Business Events, food & drinks, rail, luxury, regional gateways, and the Discover England Fund. Find out more at our Discover England Fund page.

To find out more information, browse:

VisitBritain's mission

The Government's Tourism Action Plan

VisitBritain's events

Business Recovery Webinars

DCMS's Tourism Recovery Plan

Appendix 1: Working with VisitBritain (3)

VisitBritain's global audience segments

- From 2017, VisitBritain has carried out a research project across all its main inbound target markets to define global audience segments and identify best opportunities in each of those international travellers' market. On the right is a summary of VisitBritain's 5 global audience segments. To learn more visit our page on understanding our customers.

- In the Netherlands, VisitBritain focuses on two audience segments among the international travellers:
  - **Explorers in the Neth.:** Mainly couples and empty nesters who have time and are flexible travellers. Looking for a slower paced trip.
  - **Buzzseekers in the Neth.:** Often singles, pre-family couples and young professionals. Active, enjoy foreign cultures.

Segments (& global attributes)	Global market share	Market share in the Netherlands
Buzzseekers (free spirited and spontaneous, they like holidays full of action and excitement)	38%	23%
Explorers (they enjoy outdoors, must-see sites, and embracing local cultures at a more relaxed pace)	23%	34%
Adventurers (they live to go off the beaten track, spending time outdoors and trying out new experiences)	16%	20%
Sightseers (they prefer staying within comfort zone, preferring cities to countryside, planning in advance)	12%	14%
Culture Buffs (image and brand conscious, travel is seen as a status symbol; they like well-known, safe destinations)	12%	9%

Source: VisitBritain/Kubi Kalloo, 2017

Appendix 2: Useful research resources (1)

We have dedicated research and insights available which include:

- Latest monthly, quarterly overall and quarterly by area data from the International Passenger Survey by ONS.
- Inbound Tourism Trends by Market
- Inbound activity data
- Inbound nation, region and country data
- Inbound town data
- Sector-specific research which includes topics such as accomodation, countryside and coast, culture heritage and attractions, food and drink, football tourism, shopping, transport and visits with a health condition or impairment.
- 2021 Inbound Tourism Forecast
- Britain's competitiveness

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

To find out more about the Netherlands or other inbound markets browse our:

Markets & segments

Inbound research & insights

Or contact us directly
(Email: research@visitbritain.org)

Appendix 2: Useful research resources (2)

We have dedicated research and insights available which include:

- COVID-19 consumer sentiment tracker
- Perceptions of Britain overseas
- Planning, decision-making and booking cycle of international leisure visitors to Britain
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more
- Food & drink research

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To find out more about the Netherlands or other inbound markets browse our:

Markets & segments

Inbound research & insights

Or contact us directly
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VisitBritain VisitEngland

Appendix 3: Definitions, sources and information on this report (1)

Details on main sources:

- The **International Passenger Survey** (IPS) is a UK-wide departure survey, carried out by the Office for National Statistics (ONS). All data are based on data collected as visitors are about to leave the UK about what they did, not on their intentions or perceptions. Except when specified, IPS refers to people according to their country of residence, not nationality. Where we talk about mode of transport, it refers to what is used on departure to leave the UK, with the presumption that shares are similar on arrival. To find out more and consult the release calendar, browse our IPS page.
- **Oxford Economics** tourism forecasts are from the 1 October 2021 update of the 'Global Travel Service' databank. Other information on Netherlands and the Eurozone were updated on 23 and 28 September 2021.
- **Apex** data was last updated with September 2021 data.
- **UNWTO** data are based on their latest Tourism Barometer and Statistical Annex, July 2021.
- **VisitBritain/IPSOS 2016** refers to the 'Decisions & Influences' research project carried out in Australia, Brazil, Canada, China, Denmark, France, GCC (UAE and Saudi Arabia), Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, South Korea, Spain, Sweden, and USA. Its all-market averages are based on weighted average of those markets. Only international travellers participated, half of each market sample having travelled to Britain before.
- The **Ipsos-Anholt Nation Brands Index** (NBI) was carried out online in July/August 2020 in Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK and USA. Its all-market averages are based on those markets. It is based on nation-wide representative samples. More detail in our 'How the world views the UK' foresight.

Appendix 3: Definitions, sources and information on this report (2)

Useful definitions and abbreviations

- **VFR** means Visiting Friends and/or Relatives.
- **Misc** journey purpose means Miscellaneous – other journey purposes.
- In IPS, to be defined as a **package**, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.
- **High Net Worth Individuals**, or HNWIs, are people with liquid assets valued over USD1million.

Other useful information

- **Top 10 activities in Britain** is based on propensity for visitors to have undertaken activities whilst in Britain, data having been collected between 2007 and 2019. Where an activity was asked about more than once, only the most recent answers were taken into account.
- **Repeat visits** are visits made by people who had already visited the UK before; British expats have been excluded for better representation of the market's propensity to visit Britain repeatedly. IPS question asked in 2015.
- **Likelihood to recommend Britain** as a destination is based on holiday visits, of at least one night, excluding British expats.

Market and Trade Profile: Netherlands

October 2021

Destination Bristol ©Gary Newman