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 laid out.

• ‘Chapter 4: 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 travel trade in the Netherlands.

• Further ways of working with VisitBritain and other useful research resources are pointed out in the appendix.
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Executive summary
1: Inbound market statistics

Chapter summary

• The Dutch outbound market is forecasted to account for almost 49 million trips abroad with at least one overnight stay by 2028. The UK was the seventh most popular destination globally for such trips in 2018.

• The Dutch rank globally in 15th place for international tourism expenditure with more than US$21.1bn.

• The Netherlands was the 6th largest inbound source market for the UK for volume and 8th most valuable for spend in 2018.

• France was the most considered alternative destination by Dutch visitors, whilst more than a third did not consider an alternative destination to Britain.

• The Dutch source market has excellent regional spread. London is the leading destination for a trip to Britain, accounting for 24% of visitor nights, but South West, South East and Scotland are also popular (2018).

Source: International Passenger Survey by ONS, Oxford Economics (overnight trips), UNWTO, VisitBritain/IPSOS 2016
Chapter summary

- Dining in restaurants, shopping and going to the pub are the top three most popular activities undertaken during Dutch visits in the UK overall.
- Sightseeing is the second-most popular activity for Dutch holiday visitors with almost seven in ten such visits featuring this activity. Half of Dutch holidaymakers visit castles or historic houses, and museums and arts galleries as well as religious buildings are also popular.
- Almost two in five Dutch visitors on holiday in the UK like to socialise with locals.
- Many Dutch holidays feature time outdoors with almost half visiting parks or gardens and a third enjoying walking in the countryside.
- 96% of Dutch visitors are ‘Very’/’Extremely’ likely to recommend Britain for a holiday/short break.

Source: International Passenger Survey by ONS, Ipsos-Anholt Nation Brands Index 2019
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.
• 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.
• 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 trend is not only true for Dutch short-haul travel within Europe but also applies to long-haul travel.
• 84% of the Dutch population went on at least one holiday in 2018. Dutch travellers have a high frequency of holidays with an average of about 3 holidays per person per year.

Source: VisitBritain/IPSOS 2016, CVO 2017, NBTC-NIPO 2019, Travelpro, Booking.com
4: Access and travel trade

Chapter summary

- Access to Britain is easy. 59% of Dutch visits were made by plane, followed by 29% by ferry and 13% via the Channel Tunnel (previously accessed from the neighbouring countries France and Belgium; a direct Eurostar service from Amsterdam was launched in 2018).
- The excellent regional spread of Dutch visits is supported by good connectivity to a range of regional airports in the UK.
- The pace of growth in annual aircraft seat capacity from the Netherlands to the UK has slowed to more modest levels recently, following strong growth in recovery from the financial crisis years up to 2017.
- 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: International Passenger Survey, Apex 2019 non-stop flights only
Chapter 1:
Inbound market statistics
Chapter 1.1: Key statistics

Key insights

The Netherlands was the UK’s 6th largest source market in terms of visits and 8th most valuable for visitor spending in 2018, having moved up one rank for value on 2017. The UK welcomed almost 2m visits from the Netherlands in 2018, with these visitors spending a total of £716m.

Half of Dutch visitor spending came from holiday trips and a quarter from business visits in 2018.

London is the leading destination for a trip to the UK but South East, South West and Scotland are also popular (based on average nights 2018). Dutch visits to Scotland and the South West set a volume record in 2018.

76% of holiday visits from the Netherlands to the UK in 2015 were made by repeat visitors (excl. UK nationals).

Most Dutch visits were organised independently rather than bought as part of a package or all-inclusive holiday.

Source: International Passenger Survey by ONS, Oxford Economics
1.1 Key statistics: global context and 10 year trend

Global context

<table>
<thead>
<tr>
<th>Measure</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>International tourism expenditure (US$bn)</td>
<td>21.2</td>
</tr>
<tr>
<td>Global rank for international tourism expenditure</td>
<td>15</td>
</tr>
<tr>
<td>Number of outbound overnight visits (m)</td>
<td>33.5</td>
</tr>
<tr>
<td>Most visited destination</td>
<td>France</td>
</tr>
</tbody>
</table>

Inbound travel to the UK overview

<table>
<thead>
<tr>
<th>Measure</th>
<th>Visits (000s)</th>
<th>Nights (000s)</th>
<th>Spend (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 year trend</td>
<td>+7.5%</td>
<td>+0.8%</td>
<td>+2.3%</td>
</tr>
<tr>
<td>2008</td>
<td>1,818</td>
<td>8,483</td>
<td>700</td>
</tr>
<tr>
<td>2009</td>
<td>1,715</td>
<td>7,256</td>
<td>599</td>
</tr>
<tr>
<td>2010</td>
<td>1,758</td>
<td>7,870</td>
<td>717</td>
</tr>
<tr>
<td>2011</td>
<td>1,789</td>
<td>8,413</td>
<td>624</td>
</tr>
<tr>
<td>2012</td>
<td>1,735</td>
<td>7,594</td>
<td>627</td>
</tr>
<tr>
<td>2013</td>
<td>1,891</td>
<td>8,630</td>
<td>709</td>
</tr>
<tr>
<td>2014</td>
<td>1,972</td>
<td>8,292</td>
<td>701</td>
</tr>
<tr>
<td>2015</td>
<td>1,897</td>
<td>8,370</td>
<td>676</td>
</tr>
<tr>
<td>2016</td>
<td>2,062</td>
<td>8,972</td>
<td>714</td>
</tr>
<tr>
<td>2017</td>
<td>2,136</td>
<td>9,450</td>
<td>747</td>
</tr>
<tr>
<td>2018</td>
<td>1,954</td>
<td>8,547</td>
<td>716</td>
</tr>
</tbody>
</table>

| Share of UK total in 2018           | 5.2%         | 3.2%         | 3.1%       |

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics
1.1 Key statistics – volume and value

Inbound volume and value

<table>
<thead>
<tr>
<th>Measure</th>
<th>2018</th>
<th>Change vs. 2017</th>
<th>Rank out of UK top markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits (000s)</td>
<td>1,954</td>
<td>-9%</td>
<td>6</td>
</tr>
<tr>
<td>Nights (000s)</td>
<td>8,547</td>
<td>-10%</td>
<td>10</td>
</tr>
<tr>
<td>Spend (£m)</td>
<td>716</td>
<td>-4%</td>
<td>8</td>
</tr>
</tbody>
</table>

The UK welcomed 1.4m Dutch visits in Jan-Sep 2019 (down 5% on Jan-Sep 2018). This included a weak first half of 2019, but growth in the third quarter. Dutch visitors spent a total of £551m in the first nine months of 2019 (up 3% on the first nine months in 2018).*

Nights per visit, spend

<table>
<thead>
<tr>
<th>Averages by journey purpose in 2018</th>
<th>Nights per visit</th>
<th>Spend per night</th>
<th>Spend per visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>5</td>
<td>£86</td>
<td>£444</td>
</tr>
<tr>
<td>Business</td>
<td>2</td>
<td>£163</td>
<td>£319</td>
</tr>
<tr>
<td>Visiting Friends/Relatives</td>
<td>5</td>
<td>£54</td>
<td>£281</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>2</td>
<td>£147</td>
<td>£313</td>
</tr>
<tr>
<td>All visits</td>
<td>4</td>
<td>£84</td>
<td>£366</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS, *provisional data for January-September 2019
1.1 Key statistics: journey purpose

Journey purpose 2018

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Neth.</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>41%</td>
<td>40%</td>
</tr>
<tr>
<td>Business</td>
<td>29%</td>
<td>22%</td>
</tr>
<tr>
<td>VFR</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>Study</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Misc.</td>
<td>0.3%</td>
<td>1%</td>
</tr>
<tr>
<td></td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Half of Dutch visitor spending comes courtesy of holiday visits, followed by a quarter from business visits and 19% from visits to friends and/or family residing in the UK. Dutch business visits peaked in 2014 and nearly matched this record in 2016. Since then, their volume has declined (in 2018 almost 90,000 visits short of the 2014 record).

Looking at growth over the past decade (comparing 2018 and 2008), holiday visitor spend grew strongly by 64% and VFR visitor spend grew by 41%. Visitor spending of the Dutch who came for business, study or miscellaneous purposes has declined in the same timeframe.

Source: International Passenger Survey by ONS
1.1 Key statistics: seasonality

In 2018, 28% of visits from the Netherlands to the UK were made in the second quarter, closely followed by 27% in the third quarter (Jul-Sep, traditional high season), as well as 26% in the last quarter. The first quarter saw a fifth of Dutch visits made at this time of year.

The volume of Dutch visits made to the UK in the first, second and third quarters peaked in 2017. These high levels of volume could not be matched in 2018. Whilst the aforementioned periods all saw a decline in 2018, the last quarter saw growth (+6%) in the same year.
1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, 2018 (nights, %share)

- Hotel/guest house: 38%
- Free guest with relatives or friends: 27%
- Rented house/flat: 6%
- Camping/caravan: 7%
- Hostel/university/school: 8%
- Bed & Breakfast: 10%
- Own home: 2%
- Paying guest family or friends house: 0%
- Holiday village/Centre: 0%
- Other: 6%

Duration of stay trend (visits 000s)

- Nil nights: 0
- 1-3 nights: 500
- 4-7 nights: 1,000
- 8-14 nights: 1,500
- 15+ nights: 2,000

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 4-7 nights have shown the strongest growth, up 34% in this timeframe, and producing record volume and value in 2018, whilst stays of 15 nights and more have declined by 18% between 2008 and 2018.

Two forms of accommodation dominate the picture with about three in five Dutch visitor nights spent either staying at a hotel/guest house or as a free guest with family or friends. Rented houses/flats, hostels/university/school accommodation, camping/caravan and B&Bs are also popular.

Source: International Passenger Survey by ONS
1.1 Key statistics: repeat visits and package tours

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>67%</td>
</tr>
<tr>
<td>Neth.</td>
<td>76%</td>
</tr>
<tr>
<td>Germany</td>
<td>80%</td>
</tr>
<tr>
<td>Belgium</td>
<td>62%</td>
</tr>
<tr>
<td>France</td>
<td>58%</td>
</tr>
<tr>
<td>All markets</td>
<td>63%</td>
</tr>
</tbody>
</table>

Proportion of visits that are bought as part of a package or all-inclusive tour in 2018**

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Netherlands</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Holiday</td>
<td>19%</td>
<td>13%</td>
</tr>
<tr>
<td>VFR</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>Misc.</td>
<td>6%</td>
<td>8%</td>
</tr>
</tbody>
</table>

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.

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 (92%).

Sources: International Passenger Survey by ONS. *2015, excluding UK nationals; **See definition of a package holiday in appendix (p.83)
### 1.2 Getting around Britain

**Average annual visits to the UK (2018)**

<table>
<thead>
<tr>
<th>Region</th>
<th>Nights stayed (000)</th>
<th>Visits (000)</th>
<th>Spend (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>8,547</td>
<td>1,954</td>
<td>715</td>
</tr>
<tr>
<td>Scotland (SC)</td>
<td>945</td>
<td>172</td>
<td>86</td>
</tr>
<tr>
<td>Wales (WA)</td>
<td>260</td>
<td>56</td>
<td>17</td>
</tr>
<tr>
<td>Northern Ireland (NI)</td>
<td>145</td>
<td>28</td>
<td>13</td>
</tr>
<tr>
<td>London (LDN)</td>
<td>2,072</td>
<td>695</td>
<td>260</td>
</tr>
<tr>
<td>North East (NE)</td>
<td>87</td>
<td>28</td>
<td>9</td>
</tr>
<tr>
<td>North West (NW)</td>
<td>502</td>
<td>125</td>
<td>45</td>
</tr>
<tr>
<td>Yorkshire (YO)</td>
<td>360</td>
<td>95</td>
<td>30</td>
</tr>
<tr>
<td>West Midlands (WM)</td>
<td>414</td>
<td>100</td>
<td>31</td>
</tr>
<tr>
<td>East Midlands (EM)</td>
<td>754</td>
<td>56</td>
<td>26</td>
</tr>
<tr>
<td>East of England (EoE)</td>
<td>435</td>
<td>120</td>
<td>29</td>
</tr>
<tr>
<td>South West (SW)</td>
<td>1,286</td>
<td>191</td>
<td>69</td>
</tr>
<tr>
<td>South East (SE)</td>
<td>1,259</td>
<td>316</td>
<td>81</td>
</tr>
<tr>
<td>Nil nights (Nil)</td>
<td>N/A</td>
<td>191</td>
<td>14</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS
1.2 Getting around Britain: regional spread and top towns and cities

Top towns and cities visited

<table>
<thead>
<tr>
<th>Town</th>
<th>Visits (000s, 2016-2018 average)</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>776</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>65</td>
</tr>
<tr>
<td>Manchester</td>
<td>57</td>
</tr>
<tr>
<td>Birmingham</td>
<td>43</td>
</tr>
<tr>
<td>Oxford</td>
<td>36</td>
</tr>
</tbody>
</table>

Regional spread (2018, % nights)

- London: 60%
- Rest Of England: 46%
- Northern Ireland: 2%
- Scotland: 11%
- Wales: 9%
- South West: 24%
- South East: 3%
- Northern Ireland: 2%
- All markets: 1%

London is the leading destination for a trip to the UK, accounting for 24% of visitor nights, but South West, South East and Scotland are also popular based on the average nights spent in the UK (2018).

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.

Dutch holiday visits have an above-average propensity to feature rural and coastal areas of the UK.

Dutch visitors have a below-average propensity to use public transport in the UK. Almost one in ten Dutch visits involve travellers bringing their own vehicle or hiring a car while in the UK.

Dutch visits to Scotland posted a volume record in 2018 with 172,000 visits, and total visitor spend of £86m. They also set a new volume record for visits to the South West with 191,000 visits which contributed visitor spend of £69m in this part of the UK.

11% of visits from the Netherlands were bought as part of a package or an all-inclusive tour, above the all market average of 8%. Most Dutch visits to the UK were organised independently in 2018.
1.2 Getting around Britain visits to coast, countryside and villages

Propensity to visit coast, countryside and villages

- VFR: Went to the coast or beaches
  - Netherlands: 11%
  - All markets: 13%
- VFR: Went to countryside or villages
  - Netherlands: 17%
  - All markets: 17%
- Holiday: Went to the coast or beaches
  - Netherlands: 18%
  - All markets: 14%
- Holiday: Went to countryside or villages
  - Netherlands: 20%
  - All markets: 18%
- All journey purposes: Went to the coast or beaches
  - Netherlands: 10%
  - All markets: 10%
- All journey purposes: Went to countryside or villages
  - Netherlands: 13%
  - All markets: 13%

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

- **Ferry/boat**: 2% (Netherlands), 1% (All markets)
- **Car/vehicle you/group brought to the UK**: 4% (Netherlands), 1% (All markets)
- **Hired self-drive car/vehicle**: 5% (Netherlands), 5% (All markets)
- **Private coach/minibus (for group only)**: 3% (Netherlands), 2% (All markets)
- **Public bus/coach (outside town/city)**: 3% (Netherlands), 5% (All markets)
- **Uber**: 6% (Netherlands), 9% (All markets)
- **Taxi**: 22% (Netherlands), 27% (All markets)
- **Train (outside town/city)**: 17% (Netherlands), 23% (All markets)
- **Bus, Tube, Tram or Metro Train (within town/city)**: 41% (Netherlands), 48% (All markets)
- **Domestic flight**: 0% (Netherlands), 1% (All markets)

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 (%)

Dutch visitors have a below average propensity to use public transport in the UK in general, but when they do they tend to use it more in cities while here.

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.

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

Visitor characteristics

Business visitors from the Netherlands are four times as likely to be men than women.
More than three in four Dutch holiday visitors are making a repeat visit to the UK.
Most of visits from the Netherlands to the UK were made by Dutch nationals (87%), while 20% of those visiting friends/relatives were Britons.
Almost a quarter of Dutch visits were made by those in the age group of 35-44, closely followed by about one in five by those aged 45-54 and a similar proportion by those aged 25-34 in 2018.
More than a third 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.

Source: International Passenger Survey by ONS, *2015, excluding British nationals
1.3 Visitor demographics: gender and age groups

Gender ratio of visits (2018)

<table>
<thead>
<tr>
<th>All markets</th>
<th>Female</th>
<th>Male</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netherlands</td>
<td>37%</td>
<td>62%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gender ratio of visits from the Netherlands by journey purpose (2018)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Misc.</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>50%</td>
</tr>
<tr>
<td>VFR</td>
</tr>
<tr>
<td>Holiday</td>
</tr>
<tr>
<td>Business</td>
</tr>
</tbody>
</table>

Age group trend (visits in 000s)

<table>
<thead>
<tr>
<th>Year</th>
<th>0-15</th>
<th>16-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
<th>65+</th>
<th>Not Known</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td></td>
<td></td>
<td>371</td>
<td>515</td>
<td>269</td>
<td>156</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td></td>
<td></td>
<td>435</td>
<td>511</td>
<td>267</td>
<td>123</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td></td>
<td></td>
<td>425</td>
<td>493</td>
<td>236</td>
<td>131</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td></td>
<td></td>
<td>442</td>
<td>413</td>
<td>270</td>
<td>119</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td></td>
<td></td>
<td>430</td>
<td>479</td>
<td>279</td>
<td>132</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td></td>
<td></td>
<td>457</td>
<td>460</td>
<td>251</td>
<td>101</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td></td>
<td></td>
<td>459</td>
<td>398</td>
<td>184</td>
<td>96</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td></td>
<td></td>
<td>421</td>
<td>396</td>
<td>242</td>
<td>121</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td></td>
<td></td>
<td>416</td>
<td>419</td>
<td>237</td>
<td>107</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td></td>
<td></td>
<td>428</td>
<td>370</td>
<td>223</td>
<td>85</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td></td>
<td></td>
<td>457</td>
<td>389</td>
<td>234</td>
<td>84</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td></td>
<td></td>
<td>488</td>
<td>403</td>
<td>204</td>
<td>66</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td></td>
<td></td>
<td>432</td>
<td>374</td>
<td>215</td>
<td>74</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2005</td>
<td></td>
<td></td>
<td>485</td>
<td>359</td>
<td>174</td>
<td>47</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2004</td>
<td></td>
<td></td>
<td>385</td>
<td>331</td>
<td>198</td>
<td>64</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS, % share of ‘don’t know’ for gender ratio not displayed – these visits are also excluded from the age group trend.
1.3 Visitor demographics: travel companions

Who have Dutch visitors to the UK travelled with?

- Travelling on own: 43%
- Spouse/partner: 35%
- Adult friend(s): 29%
- Adult family member(s): 28%
- Business colleague(s): 13%
- Part of a tour group: 10%
- Child(ren) - any: 5%
- Child(ren) - Dutch: 14%
- Child(ren) - any other: 13%

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 (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

- **High**
- **Medium**
- **Low**

Source: International Passenger Survey by ONS, CIA World Factbook 2019
1.4 The UK and its competitors

Market size, share and growth potential

The UK was the 7th most visited destination by Dutch travellers on overnight trips in 2018, behind France, Germany, Spain, Italy, Belgium and Austria.

Forecasts suggest there is the potential for 14% growth in the number of visits to the UK over the next decade (2018 to 2028).

For holiday visits, Germany, France and Spain receive the highest number of Dutch holidaymakers; Britain ranks in 7th place.

The volume of Dutch holidays abroad increased in 2017, up 10% on the previous year. The number of domestic holidays increased remained stable at 17.6 million in 2017. Almost three quarters of 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: CVO 2017 and 2019, Oxford Economics forecasts with VisitBritain adaptations
1.4 The UK and its competitors

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.
Chapter 2: Experiences and perceptions
2.1 Inbound 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 the UK. More than 40,000 Dutch visits per annum feature time watching football. Visitors from the Netherlands have a slightly below-average propensity to visit the performing arts while here. 96% of Dutch visitors are either ‘Very’ or ‘Extremely’ likely to recommend the UK for a holiday or short-break.

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

For more information on activities, please consult: visitbritain.org/activities-undertaken-britain

Source: International Passenger Survey by ONS, rankings based on 2007-2017 data

*VFR stands for visiting friends and/or relatives
2.1 Inbound activities

Propensity to visit museums and art galleries

- VFR: visited museums and art galleries
  - Netherlands: 18%
  - All markets: 23%
- Holiday: visited museums and art galleries
  - Netherlands: 43%
  - All markets: 48%
- All journey purposes: visited museums and art galleries
  - Netherlands: 22%
  - All markets: 28%

Propensity to visit built heritage sites

- VFR: visited religious buildings
  - Netherlands: 15%
  - All markets: 18%
- VFR: visited castles/historic houses
  - Netherlands: 22%
  - All markets: 23%
- Holiday: visited religious buildings
  - Netherlands: 33%
  - All markets: 35%
- Holiday: visited castles/historic houses
  - Netherlands: 50%
  - All markets: 48%
- All journey purposes: visited religious buildings
  - Netherlands: 17%
  - All markets: 20%
- All journey purposes: visited castles/historic houses
  - Netherlands: 25%
  - All markets: 28%

Source: International Passenger Survey by ONS, 2016
2.1 Inbound activities

Propensity to attend the performing arts

- Holiday: attended a live music event (Netherlands: 9%, All markets: 10%)
- All journey purposes: attended a live music event (Netherlands: 6%, All markets: 7%)
- All journey purposes: attended a festival (Netherlands: 2%, All markets: 3%)
- All journey purposes: went to the theatre/musical/opera/ballet (Netherlands: 5%, All markets: 9%)
- VFR: attended a festival (Netherlands: 4%, All markets: 3%)
- VFR: went to the theatre/musical/opera/ballet (Netherlands: 5%, All markets: 8%)
- Holiday: attended a festival (Netherlands: 3%, All markets: 4%)
- Holiday: went to the theatre/musical/opera/ballet (Netherlands: 9%, All markets: 14%)

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

- Football: 41
- Golf: 2
- Cricket: 1
- Horse racing: 3

Source: International Passenger Survey by ONS, 2016 (performing arts) and 2013 (watch sport live). NB data for watching individual sports is based on a small sample size.
2.1 Inbound activities

**Propensity to go for a walk**

<table>
<thead>
<tr>
<th>Journeys</th>
<th>Netherlands</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday: Walking along the coast</td>
<td>16%</td>
<td>11%</td>
</tr>
<tr>
<td>Holiday: Cycling</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Holiday: Walking in the countryside</td>
<td>33%</td>
<td>26%</td>
</tr>
<tr>
<td>VFR: Walking along the coast</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>VFR: Cycling</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>VFR: Walking in the countryside</td>
<td>38%</td>
<td>28%</td>
</tr>
<tr>
<td>All journey purposes: Walking</td>
<td>10%</td>
<td>8%</td>
</tr>
<tr>
<td>All journey purposes: Cycling</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>All journey purposes: Walking in...</td>
<td>23%</td>
<td>20%</td>
</tr>
</tbody>
</table>

**Propensity to visit a park or garden, or a national park**

<table>
<thead>
<tr>
<th>Journeys</th>
<th>Netherlands</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday: Visiting a National Park</td>
<td>16%</td>
<td>11%</td>
</tr>
<tr>
<td>All journey purposes: Visiting a National Park</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>VFR: Visiting parks or gardens</td>
<td>27%</td>
<td>32%</td>
</tr>
<tr>
<td>Holiday: Visiting parks or gardens</td>
<td>48%</td>
<td>50%</td>
</tr>
<tr>
<td>Business: Visiting parks or gardens</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>All journey purposes: Visiting parks or gardens</td>
<td>26%</td>
<td>32%</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS, 2016 (visiting parks and gardens and a national park), 2010 (walking along the coast) and 2007 (walking in the countryside)
2.1 Inbound activities

Propensity to go to a pub, and to socialise with locals

- VFR: socialising with the locals
  - Netherlands: 50%
  - All markets: 45%
  - VFR: went to pub
  - Netherlands: 54%
  - All markets: 49%
- Holiday: socialising with the locals
  - Netherlands: 38%
  - All markets: 32%
  - Holiday: went to pub
  - Netherlands: 57%
  - All markets: 48%
- Business: socialising with the locals
  - Netherlands: 17%
  - All markets: 15%
  - Business: went to pub
  - Netherlands: 27%
  - All markets: 24%
- All journey purposes: socialising with the locals
  - Netherlands: 34%
  - All markets: 32%
  - All journey purposes: went to pub
  - Netherlands: 47%
  - All markets: 42%

Propensity to go to restaurants, or bars and night clubs

- VFR: went to bars or night clubs
  - Netherlands: 15%
  - All markets: 14%
  - VFR: dining in restaurants
  - Netherlands: 61%
  - All markets: 62%
- Holiday: went to bars or night clubs
  - Netherlands: 12%
  - All markets: 15%
  - Holiday: dining in restaurants
  - Netherlands: 80%
  - All markets: 70%
- Business: went to bars or night clubs
  - Netherlands: 6%
  - All markets: 6%
  - Business: dining in restaurants
  - Netherlands: 51%
  - All markets: 49%
- All journey purposes: went to bars or night clubs
  - Netherlands: 12%
  - All markets: 12%
  - All journey purposes: dining in restaurants
  - Netherlands: 64%
  - All markets: 61%

Source: International Passenger Survey by ONS, 2008 (dining in restaurants) and 2017 (all other activities)
2.1 Inbound activities

Propensity to go shopping

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Netherlands</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>All journey purposes: went shopping</td>
<td>15%</td>
<td>21%</td>
</tr>
<tr>
<td>VFR: went shopping</td>
<td>49%</td>
<td>59%</td>
</tr>
<tr>
<td>Holiday: went shopping</td>
<td>67%</td>
<td>69%</td>
</tr>
<tr>
<td>Business: went shopping</td>
<td>54%</td>
<td>61%</td>
</tr>
</tbody>
</table>

Propensity to purchase selected items

<table>
<thead>
<tr>
<th>Item</th>
<th>Netherlands</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>None of these</td>
<td>42%</td>
<td>38%</td>
</tr>
<tr>
<td>Other holiday souvenir (not...</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>Items for your home e.g. furnishing</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Electrical or electronic items e.g...</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>CDs, DVDs, computer games etc</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Food or drink</td>
<td>29%</td>
<td>24%</td>
</tr>
<tr>
<td>Games, toys or gifts for children</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Books or stationery</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Cosmetics or toiletries e.g. perfume</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>Bags, purses etc</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Personal accessories e.g. jewellery</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Clothes or shoes</td>
<td>32%</td>
<td>41%</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS, 2017 (shopping) and 2013 (purchase of selected items)
2.1 Inbound activities

Propensity to participate in an English language course during a visit to the UK

- Belgium: 1%
- France: 3%
- Germany: 2%
- Italy: 2%
- Netherlands: 1%
- Switzerland: 2%

Propensity to visit a literary, music, TV or film location

- Holiday: visited literary, music, TV, or film locations
  - Belgium: 1%
  - France: 2%
  - Germany: 1%
  - Italy: 2%
  - Netherlands: 3%
  - Switzerland: 2%

- All journey purposes: visited literary, music, TV, or film locations
  - Belgium: 1%
  - France: 2%
  - Germany: 1%
  - Italy: 2%
  - Netherlands: 3%
  - Switzerland: 2%

Source: International Passenger Survey by ONS, 2017 (literary, music, TV or film location), 2018. Did you go on any English language courses during this visit? Displayed as % of all visits to the UK from each country that included participation in an English language course.
2.2 Welcome and recommending Britain

Feeling of ‘welcome’ in Britain

Likelihood to recommend Britain

Source: International Passenger Survey by ONS, 2017
2.3 Perceptions of the UK

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.

### 2.3 Perceptions of the UK

#### UK’s ranking (out of 50 nations)

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

Source: Anholt-Ipsos Nation Brands Index 2019
2.3 Perceptions of the UK

Cultural associations with the UK

<table>
<thead>
<tr>
<th>Activity</th>
<th>Neth.*</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Museums</td>
<td>43%</td>
<td>47%</td>
</tr>
<tr>
<td>Music</td>
<td>43%</td>
<td>49%</td>
</tr>
<tr>
<td>Films</td>
<td>39%</td>
<td>45%</td>
</tr>
<tr>
<td>Sports</td>
<td>37%</td>
<td>42%</td>
</tr>
<tr>
<td>Modern Design</td>
<td>23%</td>
<td>31%</td>
</tr>
<tr>
<td>Pop videos</td>
<td>18%</td>
<td>27%</td>
</tr>
<tr>
<td>Opera</td>
<td>19%</td>
<td>23%</td>
</tr>
<tr>
<td>Sculpture</td>
<td>15%</td>
<td>20%</td>
</tr>
<tr>
<td>Street Carnival</td>
<td>3%</td>
<td>15%</td>
</tr>
<tr>
<td>Circus</td>
<td>8%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Adjectives describing a potential trip to the UK

<table>
<thead>
<tr>
<th>Adjective</th>
<th>Neth.*</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational</td>
<td>31%</td>
<td>35%</td>
</tr>
<tr>
<td>Fascinating</td>
<td>30%</td>
<td>32%</td>
</tr>
<tr>
<td>Exciting</td>
<td>12%</td>
<td>31%</td>
</tr>
<tr>
<td>Relaxing</td>
<td>21%</td>
<td>35%</td>
</tr>
<tr>
<td>Romantic</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>None</td>
<td>16%</td>
<td>23%</td>
</tr>
<tr>
<td>Spiritual</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>Stressful</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>Boring</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Risky</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Depressing</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: Anholt-Ipsos Nation Brands Index 2019
### 2.3 Perceptions of the UK

**Holiday wants and % saying destination is best place for…**

<table>
<thead>
<tr>
<th>Importance</th>
<th>GB</th>
<th>FR</th>
<th>IT</th>
<th>AU</th>
<th>US</th>
<th>GE</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.80</td>
<td>12%</td>
<td>10%</td>
<td>19%</td>
<td>27%</td>
<td>25%</td>
<td>10%</td>
</tr>
<tr>
<td>5.50</td>
<td>18%</td>
<td>19%</td>
<td>25%</td>
<td>29%</td>
<td>27%</td>
<td>20%</td>
</tr>
<tr>
<td>5.48</td>
<td>16%</td>
<td>23%</td>
<td>22%</td>
<td>18%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>5.41</td>
<td>8%</td>
<td>27%</td>
<td>20%</td>
<td>34%</td>
<td>10%</td>
<td>16%</td>
</tr>
<tr>
<td>5.37</td>
<td>7%</td>
<td>9%</td>
<td>17%</td>
<td>35%</td>
<td>26%</td>
<td>16%</td>
</tr>
<tr>
<td>5.30</td>
<td>13%</td>
<td>40%</td>
<td>53%</td>
<td>19%</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>5.29</td>
<td>19%</td>
<td>32%</td>
<td>37%</td>
<td>33%</td>
<td>29%</td>
<td>17%</td>
</tr>
<tr>
<td>5.28</td>
<td>0%</td>
<td>23%</td>
<td>40%</td>
<td>51%</td>
<td>17%</td>
<td>1%</td>
</tr>
<tr>
<td>5.26</td>
<td>6%</td>
<td>24%</td>
<td>22%</td>
<td>22%</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>5.25</td>
<td>14%</td>
<td>13%</td>
<td>30%</td>
<td>35%</td>
<td>27%</td>
<td>9%</td>
</tr>
<tr>
<td>5.24</td>
<td>18%</td>
<td>30%</td>
<td>29%</td>
<td>49%</td>
<td>25%</td>
<td>21%</td>
</tr>
<tr>
<td>5.23</td>
<td>19%</td>
<td>46%</td>
<td>54%</td>
<td>19%</td>
<td>11%</td>
<td>19%</td>
</tr>
<tr>
<td>5.22</td>
<td>18%</td>
<td>13%</td>
<td>22%</td>
<td>37%</td>
<td>24%</td>
<td>21%</td>
</tr>
<tr>
<td>5.19</td>
<td>29%</td>
<td>14%</td>
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<tr>
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<td>16%</td>
<td>51%</td>
<td>36%</td>
<td>32%</td>
<td>23%</td>
</tr>
</tbody>
</table>
2.3 Perceptions of the UK

Motivations for choosing Britain as a holiday destination

- Cultural attractions
- Wide variety of places to visit
- Wanted to go somewhere new
- Vibrant cities
- Countryside/natural beauty
- Easy to get around
- Somewhere English-spoken
- Visiting friends or relatives
- Ease of getting to the country
- A culture different from own
- A mix of old and new
- Contemporary culture
- Try local food and drink
- A good deal
- Security / safety
- Accommodation (variety & quality)
- Easy to get plan/organise
- Meeting locals
- Wide range of holiday activities
- The climate / weather
- Cost of staying in the destination
- Watching sport
- Visit a film/TV location
- Easy to visit with children

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)
2.3 Perceptions of the UK

Sought-after Britain activities

- Spot wildlife in the Scottish Highlands: Netherlands 42%, All 15 markets 74%
- Enjoy a traditional afternoon tea: Netherlands 50%, All 15 markets 66%
- Take a canal boat tour through the waterways of England: Netherlands 53%, All 15 markets 65%
- Ride the scenic 'Hogwarts Express' (Harry Potter train) through the Scottish Highlands: Netherlands 56%, All 15 markets 66%
- Walk along Hadrian's wall in Northern England: Netherlands 47%, All 15 markets 54%
- Stay the night in a fairy-tale castle: Netherlands 47%, All 15 markets 54%
- Drive through the countryside of England: Netherlands 51%, All 15 markets 53%
- Share stories over a pint with locals in a cosy rural pub: Netherlands 50%, All 15 markets 50%
- A food tour of one of London's best foodie markets: Netherlands 48%, All 15 markets 48%
- Watch a musical in London's West End: Netherlands 45%, All 15 markets 52%
- Hunt for The Loch Ness Monster with a boat cruise on Loch Ness: Netherlands 32%, All 15 markets 41%
- Explore Britain's history using a historic cities app to uncover the stories: Netherlands 41%, All 15 markets 41%
- Visit Windsor Castle where Harry and Meghan got married: Netherlands 38%, All 15 markets 40%
- Explore the Beatles Story in their home city of Liverpool: Netherlands 38%, All 15 markets 40%
- Take a street art tour in one of Britain's modern cities: Netherlands 38%, All 15 markets 40%
- Visit Madame Tussauds: Netherlands 34%, All 15 markets 42%
- Shop for vintage fashion and antiques: Netherlands 32%, All 15 markets 30%
- Climb one of Britain's highest mountains for epic views: Netherlands 31%, All 15 markets 31%
- Relax in Bath spa's rooftop pool: Netherlands 31%, All 15 markets 31%
- Do a cycle tour in Britain: Netherlands 30%, All 15 markets 36%

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. Top 20 activities shown; for full list please see report at visitbritain.org/understanding-international-visitors
Chapter 3: Understanding the market
3.1 Structural drivers

Demographics & society
Population of about 17 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, 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.
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.

Source: Oxford Economics, CIA World Factbook 2019, World Bank
3.1 Structural drivers: general market overview

General market conditions

The Netherlands were the UK’s sixth largest source market in terms of visits and eighth most valuable in terms of visitor spending in 2018.

The Dutch economy slightly outperforms the Eurozone economy as shown below; however, recent data highlighting problems in some industrial sectors illustrates strengthening headwinds which are likely to see the pace of growth slow.

For now the forecast is held stable for 2019 and real GDP is expected to grow modestly by 1.3% in 2020.

The labour market is expected to remain robust highlighting resilience. Inflation is ahead of levels in other Eurozone markets, albeit improving.

Key demographic and economic data

<table>
<thead>
<tr>
<th>Measure (2019 data)</th>
<th>Neth.</th>
<th>Eurozone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (m)</td>
<td>17.3</td>
<td>338.9</td>
</tr>
<tr>
<td>GDP per capita PPP (US$)</td>
<td>54,053</td>
<td>44,005</td>
</tr>
<tr>
<td>Annual average GDP growth over past decade (%)</td>
<td>1.4</td>
<td>1.4</td>
</tr>
<tr>
<td>Annual average GDP growth in 2019 (%)</td>
<td>1.7</td>
<td>1.2</td>
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</table>

Source: Oxford Economics

Economic indicators (%)

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<tr>
<th>Indicator</th>
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<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real GDP growth</td>
<td>2.5</td>
<td>1.7</td>
<td>1.3</td>
<td>1.2</td>
</tr>
<tr>
<td>Real consumer spending growth</td>
<td>2.3</td>
<td>1.4</td>
<td>1.4</td>
<td>1.4</td>
</tr>
<tr>
<td>Unemployment rate</td>
<td>4.8</td>
<td>4.3</td>
<td>4.5</td>
<td>4.7</td>
</tr>
</tbody>
</table>
3.1 Structural drivers: demographic and social indicators

Population dynamics

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 26th 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 2019 there were 259,000 High Net Worth Individuals (HNWI)* resident in the Netherlands in 2018, up 2% on 2017. It is Europe’s sixth largest and globally the 11th largest HNWI population.

<table>
<thead>
<tr>
<th>Measure</th>
<th>2019 estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total population (m)</td>
<td>17.3</td>
</tr>
<tr>
<td>Median age (2018 est.)</td>
<td>43 years old</td>
</tr>
<tr>
<td>Overall growth rate (2019-2023)</td>
<td>1.9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Indicator</th>
<th>2010</th>
<th>2020</th>
<th>2030</th>
<th>2040</th>
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<tr>
<td>Median age (in years)</td>
<td>40.8</td>
<td>43.3</td>
<td>44.7</td>
<td>46.3</td>
</tr>
</tbody>
</table>

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 at visitbritain.org/visitor-economy-facts.

Source. Bank of England
3.2 Consumer trends

84% of the Dutch population took at least one holiday in 2019. The amount of holidays abroad in 2018 accounted for 22.2 million.

Dutch people spent a total of €21bn on holidays in 2019 – an increase of 3% on 2018.

The age group 45-64 years spent most on holidays with an average of €1,687 per year.

Although many Dutch people go on holiday several times a year, two thirds would prefer to go on holiday more often if, time and money were available. The Dutch see holidays as a top spending priority.

At the same time, the popularity of domestic holidays is increasing in the Dutch market, facilitated, among other factors, by the growth of volume of short stays, the ageing population with seniors having an above-average propensity to holiday in the Netherlands, and an increasing consciousness of the impact of flying.

The Dutch market is seeing holidays by train becoming increasingly popular (+27% in the latest year).

Sources: NBTC-NIPO 2019, Trends & Tourism 2020
3.2 Consumer trends: overall travel trends

Travel trends
The Dutch holiday market continues to grow. The proportion taking holidays increased again: 84% of the Dutch population went on at least one holiday in 2019.
In 2017, the Dutch took a total of 36.7 million holiday trips (up 3% on 2016). The volume of holidays abroad grew strongly to 19.1 million (up 7%), while domestic holidays remained stable with 17.6 million. The average length of stay of a Dutch holiday was 10 nights.
The market share of Dutch holidays with a destination abroad is also growing: 52.1% of Dutch travelled abroad on holidays in 2017 (up from 50.5% in the previous year) and 47.9% stayed within the Netherlands (down from 49.5% before).
The highest volume of people going on holidays is among the age group of 65+, followed by Dutch aged 45-54 and 55-64.
Dutch total holiday spend amounted to €17.4bn in 2017, of which €14.3bn were spent on holidays outside of the Netherlands.
The age group 45-64 years spent most on holidays with an average of €1,687 per year.
Looking specifically at holidays, Germany and France held their position as number one and number two as the most popular destinations for Dutch holidaymakers. France and Spain experienced growth for Dutch holidays (up 7% and 9% respectively). Great Britain’s market share remained stable year-on-year (5%), ahead of Turkey, Greece and Portugal. Overall, the volume of Dutch holidays in the Mediterranean and intercontinental holidays also saw strong growth (up 11% and 18% 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.
2017 saw good growth of bookings made via online travel agents (OTAs). Dutch bookings via social travel sites like Airbnb and Wimdu experienced particularly strong growth (up 22% in 2017). At the same time, bookings via independent / personal travel counsellors also showed growth of 9%.

3.2 Consumer trends: overall travel trends

Motivation and attitudes to holidays
Although many Dutch people go on holiday several times a year, two thirds would prefer to go on holiday more often if time and money were available. The Dutch see holidays as the top spending priority when they have the money for it.

The Dutch tend to be very price-conscious holiday-makers who look for good value for money. The variety of activities on offer in the destination as well as a sun destination also feature among the most important criteria for choosing the destination for the main holiday.

Wi-Fi is an important criterion for accommodation booking (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.

On vacation, people take or have more time for being active than at home. 60% of respondents are actively busy during the holidays, while 45% say that they do this in daily life. Walking is by far the most favourite sporting activity during a holiday. 80% of the respondents put on walking shoes on vacation, followed by swimming (47%), cycling (38%) and fitness (16%). But running, yoga and tennis are also popular activities during the holidays.

Parents with children aged 0-15 years find it important to recharge, and, for many Dutch people, being healthy and active during the holidays is the way to recharge.

There is a very open and active discussion in the Dutch market around flying and its environmental impact among the government and other stakeholders as more than a third of flights departing from Schipol are short-haul. Air traffic policy has thus been adapted and public awareness is high. This could be one of the reasons which has facilitated a strong increase in rail travel for holidays and an increase in the volume of domestic travel. The Dutch rail company NS International has seen its sales increase by 13% (on 2017) which is attributed to the new service between London and Rotterdam / Amsterdam but also increased environmental consciousness.

3.2 Consumer trends: reasons for holidays

Main reasons for going on holiday (%)

- Sun/beach: 39% (NL), 39% (EU28)
- Visiting family/friends/relatives: 28% (NL), 38% (EU28)
- Nature: 31% (NL), 50% (EU28)
- City trips: 26% (NL), 27% (EU28)
- Culture: 39% (NL), 26% (EU28)
- Wellness/Spa/health treatment: 3% (NL), 13% (EU28)
- Sport-related activities: 16% (NL), 12% (EU28)
- Specific events: 9% (NL), 9% (EU28)

Reasons to return to the same destination for a holiday (%)

- The natural features: 53% (NL), 45% (EU28)
- The quality of the accommodation: 32% (NL), 32% (EU28)
- Cultural and historical attractions: 31% (NL), 31% (EU28)
- The general level of prices: 20% (NL), 24% (EU28)
- How tourists are welcomed: 15% (NL), 21% (EU28)
- The activities/services available: 19% (NL), 20% (EU28)
- Accessible facilities for people with special needs: 5% (NL), 6% (EU28)

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?
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 trend is not only true for short-haul travel within Europe but also applies to long-haul travel.

Source: VisitBritain/IPSOS 2016, Travelpro, Booking.com
3.3 Booking and planning: booking channels and ticket sales

How trips to Britain were booked: travel only

<table>
<thead>
<tr>
<th>Booking method</th>
<th>Neth.</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>93%</td>
<td>85%</td>
</tr>
<tr>
<td>Face-to-face</td>
<td>2%</td>
<td>10%</td>
</tr>
<tr>
<td>By phone</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Booking method</th>
<th>Neth.</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>72%</td>
<td>70%</td>
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<tr>
<td>Face-to-face</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>By phone</td>
<td>0%</td>
<td>3%</td>
</tr>
<tr>
<td>Did not book/stayed with friends/relatives</td>
<td>20%</td>
<td>17%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

How trips to Britain were booked: travel and accommodation (holiday)

<table>
<thead>
<tr>
<th>Booking method</th>
<th>Neth.</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>80%</td>
<td>64%</td>
</tr>
<tr>
<td>Face-to-face</td>
<td>10%</td>
<td>27%</td>
</tr>
<tr>
<td>By phone</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>4%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)
3.3 Booking and planning: booking channels and ticket sales

Propensity to make a purchase before or during trip

<table>
<thead>
<tr>
<th>Pre</th>
<th>During</th>
<th>Pre</th>
<th>During</th>
<th>Pre</th>
<th>During</th>
<th>Pre</th>
<th>During</th>
</tr>
</thead>
<tbody>
<tr>
<td>Theatre / Musical / Concert tickets</td>
<td>15%</td>
<td>30%</td>
<td>14%</td>
<td>23%</td>
<td>24%</td>
<td>13%</td>
<td>4%</td>
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<tr>
<td>Sporting event tickets</td>
<td>8%</td>
<td>28%</td>
<td>5%</td>
<td>22%</td>
<td>8%</td>
<td>28%</td>
<td>7%</td>
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<tr>
<td>Guided sightseeing tours in London</td>
<td>11%</td>
<td>45%</td>
<td>19%</td>
<td>31%</td>
<td>31%</td>
<td>41%</td>
<td></td>
</tr>
<tr>
<td>Guided sightseeing tours outside of London</td>
<td>11%</td>
<td>45%</td>
<td>19%</td>
<td>31%</td>
<td>31%</td>
<td>41%</td>
<td></td>
</tr>
<tr>
<td>Tickets / passes for other tourist attractions</td>
<td>11%</td>
<td>31%</td>
<td>19%</td>
<td>31%</td>
<td>31%</td>
<td>41%</td>
<td></td>
</tr>
</tbody>
</table>

Netherlands | All markets

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 (1/2)

Decision lead-time for visiting Britain

<table>
<thead>
<tr>
<th>Lead time</th>
<th>Neth.</th>
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<tbody>
<tr>
<td>6+ months</td>
<td>32%</td>
<td>45%</td>
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<tr>
<td>3-6 months</td>
<td>36%</td>
<td>31%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td>Less than 1 month</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>6%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Looking at options/prices

<table>
<thead>
<tr>
<th>Lead time</th>
<th>Neth.</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>6+ months</td>
<td>9%</td>
<td>21%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>38%</td>
<td>37%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>30%</td>
<td>27%</td>
</tr>
<tr>
<td>Less than 1 month</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>8%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Deciding on the destination

<table>
<thead>
<tr>
<th>Lead time</th>
<th>Neth.</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>6+ months</td>
<td>18%</td>
<td>32%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>42%</td>
<td>38%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>Less than 1 month</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>8%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Booking the trip

<table>
<thead>
<tr>
<th>Lead time</th>
<th>Neth.</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>6+ months</td>
<td>7%</td>
<td>14%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>29%</td>
<td>32%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>29%</td>
<td>28%</td>
</tr>
<tr>
<td>Less than 1 month</td>
<td>27%</td>
<td>21%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>9%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/IPSOS 2016, base: visitors
3.3 Booking and planning: lead-times (2/2)

Decision lead-time for visiting Britain: commentary (see tables on previous slide)

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.

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.

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.

Sources: VisitBritain/IPSOS 2016, Media: Tijd 2018, Emerce 2019, AD, Expedia and VakantieDiscounter
3.4 Reaching the consumer: broadcast media, radio and papers

Broadcast media
The Dutch watch broadcast media for three hours and 5 mins per day, with 58 mins. of this spent on on-demand viewing eg. Netflix and YouTube. Broadcast media still holds the largest share of daily media consumption. The decrease in live TV viewing time by half an hour in three years is fully replaced by the increase in “digital viewing”.
Travel shows on Dutch TV: 3 op Reis, Reizen Waes, Verborgen Dorpen, Erica op Reis, Floortje naar het einde van de Wereld, Rail Away.

Radio
The Dutch spend on average 2 hours and 32 mins on listening to media each day, a share which has decreased at the expense of online music services. Almost thee quarters of this is spent listening to live radio. (Media: tijd) There are 6 public and 14 commercial radio stations (Carat factbook), but no dedicated travel shows on Dutch radio (Media: tijd).

Newspapers
The average time the Dutch spent on reading is 42 mins. per day. 67% of this time is spent on reading print copies (slightly down year-on-year) and the remaining 33% (14 mins.) on digital reading. (Media: tijd)
Half of the Dutch households read print versions daily. Newspaper readers spent on average between 42-60 mins. 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: Carat factbook, Media: tijd 2018
3.4 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 (circ.): 22,624), National Geographic Traveler (circ. 50,000), Lonely Planet Traveller (circ. 30,000) and Columbus Travel (circ. 29,000).

Media trends:
Consumption on digital platforms increases, but print is still the 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.

11.5 million Dutch people have installed WhatsApp on their smartphones. 8.3 million of those use the messaging app daily. WhatsApp is used more than Facebook (10.8 million) and YouTube (8 million). Instagram has seen the biggest increase over the past year. Both in amount of users (+28%) and frequency of use (+40%). (Newcom Research & Consultancy 2018)

Source: Lees Tijd, Newcom Research & Consultancy, Travel Next
### 3.4 Reaching the consumer: social media on holiday

#### Use of social media on holiday

- **To keep in touch with people at home**
  - Netherlands: 40%
  - All markets: 39%

- **To post / upload photos of my holiday**
  - Netherlands: 35%
  - All markets: 39%

- **Look for recommendations for places to eat or drink**
  - Netherlands: 15%
  - All markets: 30%

- **I have not used social media at all on this type of holiday**
  - Netherlands: 33%
  - All markets: 29%

- **Share with others where you are / what you are doing while on holiday**
  - Netherlands: 23%
  - All markets: 29%

- **To let people know where I am at a given moment (e.g. checking in on Facebook)**
  - Netherlands: 22%
  - All markets: 25%

- **To help you plan / decide where to go or what to see or what to do**
  - Netherlands: 14%
  - All markets: 23%

- **Ask for advice on where to go or what to do**
  - Netherlands: 5%
  - All markets: 20%

- **Share my own advice or recommendations about visiting where I am**
  - Netherlands: 6%
  - All markets: 19%

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)?
3.4 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)
Chapter 4: Access and travel trade
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.

29% of Dutch visits came to the UK over the Channel, i.e. by ferries, with 67% of those who chose this mode of transport bringing a private vehicle (2018).

13% of visits are made via the Channel Tunnel. A new direct Eurostar service connecting Amsterdam with London launched in April 2018. The uptake of the service has been reported as very positive which resulted in an increase to three daily services in 2019 and plans to raise their number to five daily services by 2021.

The pace of growth in annual aircraft seat capacity from the Netherlands to the UK has slowed to more modest levels recently, following strong growth in a period of recovery from the financial crisis years up to 2017.

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.

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

59% of Dutch visitors travel to the UK by plane.

<table>
<thead>
<tr>
<th>Access to Britain</th>
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<tbody>
<tr>
<td>Measure</td>
</tr>
<tr>
<td>Weekly aircraft departures</td>
</tr>
<tr>
<td>Weekly aircraft seat capacity</td>
</tr>
<tr>
<td>Airports with direct routes in the Netherlands</td>
</tr>
<tr>
<td>Airports with direct routes in Britain</td>
</tr>
<tr>
<td>Weekly ferry crossings</td>
</tr>
</tbody>
</table>
4.1 Access: mode of transport

Visits by mode of transport

Sea and tunnel travel (000s) in 2018

Annual share by mode (2018)

Source: International Passenger Survey by ONS
4.1 Access: capacity

Annual airline seat capacity trends

- **2007**: 4,000,000
- **2009**: 4,500,000
- **2011**: 5,000,000
- **2013**: 5,500,000
- **2015**: 6,000,000
- **2017**: 6,500,000
- **2019**: 6,715,719

Airline seat capacity by carrier (2019)

- **KLM**: 43%
- **easyJet**: 27%
- **British Airways**: 8%
- **Flybe**: 4%
- **Ryanair**: 3%
- **Other**: 14%

Source: Apex 2019: non-stop flights only
4.1 Access: capacity

Destination airport annual seat capacity

- London - Heathrow: 24%
- Amsterdam - Schiphol: 16%
- Manchester International: 10%
- Rotterdam The Hague: 9%
- London - Gatwick: 9%
- London City: 9%
- London - Luton: 8%
- London - Stansted: 6%
- Bristol: 6%
- Maastricht/Aachen: 4%
- Other: 4%

Origin airport annual seat capacity

- Eindhoven: 4%
- Groningen - Eelde: 2%
- Amsterdam - Schiphol: 1%
- Rotterdam The Hague: 0%
- London City: 0%
- London - Stansted: 0%
- Brussels: 0%
- Copenhagen: 0%
- Heathrow: 0%

Source: Apex 2019: non-stop flights only

Destination Airports with less than 4% annual seat share grouped in ‘Other’: Newcastle, Aberdeen, London Southend, Leeds/Bradford, Liverpool, Southampton, Norwich, Cardiff, Humberside, Durham Tees Valley, Belfast International and City, Inverness, Exeter, East Midlands, Doncaster Sheffield
4.2 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. 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.
4.2 Travel trade: Dutch tour operators

Top ten operators in the Netherlands in 2018

<table>
<thead>
<tr>
<th>Top Ten Tour Operators</th>
<th>Turnover €m</th>
<th>Pax</th>
</tr>
</thead>
<tbody>
<tr>
<td>TUI Nederland</td>
<td>1,263</td>
<td>1,758,400</td>
</tr>
<tr>
<td>Corendon</td>
<td>599</td>
<td>751,000</td>
</tr>
<tr>
<td>Sunweb Group</td>
<td>410</td>
<td>664,000</td>
</tr>
<tr>
<td>Thomas Cook*</td>
<td>260</td>
<td>unknown</td>
</tr>
<tr>
<td>ANWB Reizen Group</td>
<td>184.2</td>
<td>207,900</td>
</tr>
<tr>
<td>Belvilla/@Leisure</td>
<td>129</td>
<td>660,000</td>
</tr>
<tr>
<td>Vacansoleil</td>
<td>101</td>
<td>493,000</td>
</tr>
<tr>
<td>De Jong Intra Vakanties</td>
<td>69.3</td>
<td>157,780</td>
</tr>
<tr>
<td>Bookit/Weekendjeweg.nl</td>
<td>66</td>
<td>unknown</td>
</tr>
<tr>
<td>VacanceSelect Europe</td>
<td>62</td>
<td>unknown</td>
</tr>
</tbody>
</table>

Major tour operators with a Britain programme are:

Source: TravMagazine October 2019, *Thomas Cook ceased trading in 2019
4.2 Travel trade: Dutch holidays

Public and local holidays

National public holidays in 2020

<table>
<thead>
<tr>
<th>Date 2020</th>
<th>National Holiday</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 January</td>
<td>New Year's Day</td>
</tr>
<tr>
<td>13 April</td>
<td>Easter Monday</td>
</tr>
<tr>
<td>27 April</td>
<td>King's Birthday</td>
</tr>
<tr>
<td>5 May</td>
<td>Liberation Day</td>
</tr>
<tr>
<td>21 May</td>
<td>Ascension Day</td>
</tr>
<tr>
<td>1 June</td>
<td>Whit Monday</td>
</tr>
<tr>
<td>25 December</td>
<td>Christmas Day</td>
</tr>
<tr>
<td>26 December</td>
<td>Boxing Day</td>
</tr>
</tbody>
</table>

*Please also note that 5th December is Saint Nicolas and many offices close early. 10th April is Good Friday and many offices close for that day, too. 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.*
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:

• 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 some more-or-less round figure. A rule of thumb is to add 5-10% to a full Euro amount.
4.3 Caring for the Consumer

Caring for the Consumer:
The Dutch tend to be sceptical about traditional British cuisine. However, Celebrity Chefs (Jamie Oliver, Gordon 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 2018 were spent in camping accommodation and 10% in rented flats/houses. Complaints from Dutch visitors should be resolved promptly.

Source: International Passenger Survey by ONS
Appendix
Useful links and further information
Appendix 1: 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 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

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 ‘I Travel For…’ marketing campaign.

• 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.

To find out more information, browse:

VisitBritain’s mission
The Government’s Tourism Action Plan
VisitBritain’s events
‘I Travel For…’ campaign
The tourism sector deal
Appendix 1: Working with VisitBritain

VisitBritain’s global audience segments

In 2017-2019, VisitBritain 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 Understanding our consumers.

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.

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

Source: VisitBritain/Kubi Kalloo, 2017-2019
Appendix 2: Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS as well as by area of the UK
- Inbound Tourism Trends by Market
- Inbound activity data
- Sector-specific research
- 2020 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 pages or our inbound research & insights or contact us directly (Email: research@visitbritain.org)
Appendix 2: Useful research resources

We have dedicated market-specific research and insights available which include:

• Perceptions of Britain overseas
• Planning, decision-making and booking cycle of international leisure visitors to Britain on understanding international visitors
• Gateways in England, insights on overseas visitors to England’s regions, participation in leisure activities, multi-destination trips and more on visitor characteristics and behaviour
• Food & drink research

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 pages or our inbound research & insights or contact us directly (Email: research@visitbritain.org)
Appendix 3: Definitions, sources and information on this report

How to read the information in this market profile

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. You can find out more and consult the release calendar, on our [IPS webpage](#).

- **Oxford Economics** last updated the ‘Global Travel Service’ databank on 8th November 2019, other information on the Netherlands and the Eurozone on 8 January 2020.

- **Apex** was last updated with December 2019 data.

- **UNWTO data** are based on their latest Tourism Barometer and Statistical Annex, January 2020.

- **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 **Anholt-Ipsos Nation Brands Index** (NBI), was carried out online in July 2019 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. Fieldwork in Spain and the Netherlands was carried out in September/October 2019. It is based on nation-wide representative samples.
Appendix 3: Definitions, sources and information on this report

How to read the information in this market profile

Useful definitions and abbreviations

• **VFR** means Visiting Friends and/or Relatives.
• **Misc** 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 USD1 million.

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 2018. 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

February 2020