



NBTC
Holland Marketing

Insights from the Travel Developments to NL

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Virtual Travel Trade Event, 17 November 2020

1. Developments inbound tourism the Netherlands incl. day trips
2. Impact and effects through Covid-19
3. Sentiment research at holland.com
4. Short- and long-term expectation tourism to NL

1. Developments inbound tourism NL / Daytrips



Take out:

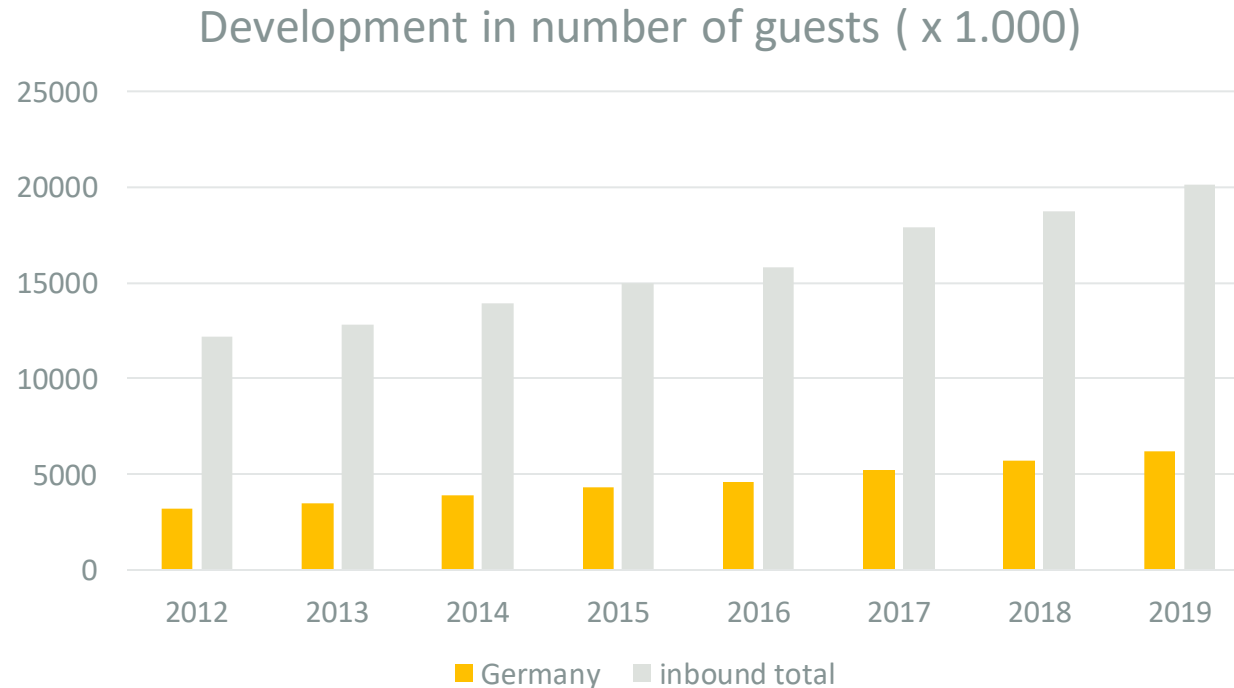
- Inbound tourism in the NL has undergone significant growth in past decades.
- Especially Germany showed high growth rates
- Almost 6.2 mln. German guests spent the night in 2019 in NL



Number of international (overnight) guests in the Netherlands

Germany

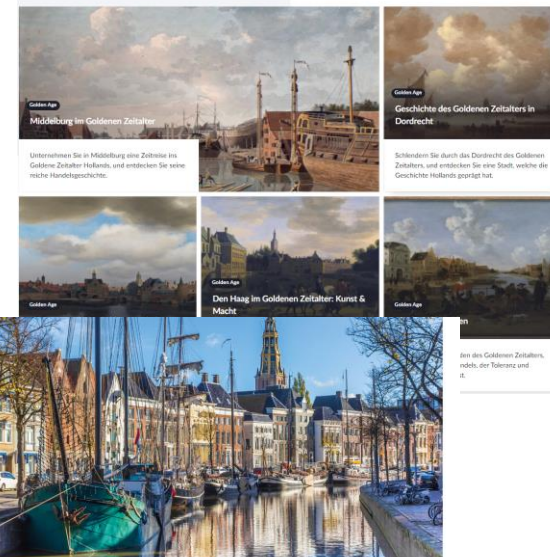
- coming from 3.2 mln. in 2012 up to 6.2 mln. last year (2019)
- Marketshare has grown from 26% in 2012 to 30% in 2019



Some explanations for the growth

- Increase in willingness to travel (people have time, money, and needs)
- Repeat visitors (short holiday breaks from GE & BE)
- Extra international media attention (such as Best in Travel 2020 from the Lonely Planet) and due to the Dutch winner of the Eurovision Songfestival
- Joined Marketing initiatives (e.g. celebration of 75 years of Freedom and the theme year Rembrandt and the Golden Age)

Entdecke in diesen Städten das Goldene Zeitalter



7. NIEDERLANDE

75 Jahre sind seit dem Ende des Zweiten Weltkriegs vergangen und diese Freiheit wollen die Niederlande 2020 mit Veranstaltungen im ganze Land feiern. Dass das pulsierende Amsterdam immer einen Besuch wert ist steht außer Frage, aber dank des hervorragenden Zugnetzes kannst du auch in weiteren atemberaubenden Städten eine Vielzahl von Feierlichkeiten erkunden. April und Mai sind die perfekten Monate für einen Besuch, denn dann kann man sowohl den Koningsdag und den Bevrijdingsdag (Tag der Befreiung) als auch den Eurovision Song Contest, der in diesem Jahr dort stattfinden wird, mit den Niederländern feiern. Außerdem lädt das 35.000 km lange und stetig wachsende Netz von Radwegen dazu ein, Attraktionen auch außerhalb der Städte zu erkunden - wie das zum UNESCO-Weltkulturerbe zählende Wattenmeer - und dabei die Vielfalt und Schönheit der Natur zu entdecken, die dieses kleine Land zu bieten hat.



Day trips to NL

46,77 mln. day trips

3,94 bln. turnover



2. Impact and effects through Covid-19



Take out:

- NL expected 14 mln foreign guests less than in 2019 (-71%)
- German market shrinks by more than 50%



Back to the 90's

NBTC has made an adjusted expectation for inbound tourism in 2020. Many factors influence these developments, like the spreading of the virus, national travel restrictions, travel sentiment, and economic developments.



FORECAST INBOUND TOURISM 2020							
ALL ACCOMMODATIONS							
	Guests (x 1,000)						
	2015	2016	2017	2018	2019*	2020**	+/-
Europe	12.050	12.743	14.151	14.974	16.040	17.565	8%
- Germany	4.283	4.615	5.243	5.689	6.130	6.895	13%
- Belgium	1.965	2.132	2.224	2.398	2.495	2.020	-5%
- UK	1.967	2.045	2.229	2.212	2.400	2.450	2%
- Ireland	125	192	218	220	225	225	2%
- France	750	788	842	893	960	1.020	6%
- Italy	543	528	589	597	635	665	5%
- Spain	432	444	467	495	525	550	5%
- Scandinavia	441	415	457	445	465	485	4%
- Russia	152	130	180	204	245	270	10%
- Rest of Europe	1.663	1.718	1.999	2.128	1.965	2.190	10%
Americas	1.508	1.646	2.013	2.072	2.195	2.330	6%
- US	1.035	1.182	1.414	1.480	1.570	1.650	5%
- Canada	155	155	180	173	180	185	4%
- Brazil	150	115	150	154	170	180	5%
Asia	1.130	1.103	1.373	1.360	1.500	1.535	2%
- Japan	138	109	120	121	135	140	2%
- China (incl. Hong Kong)	330	297	364	333	380	305	-20%
- India	101	127	165	178	195	210	7%
- Indonesia	47	56	59	52	58	61	5%
Australia and Oceania	189	200	235	219	235	220	-5%
Africa	130	137	152	156	190	205	10%
Total	15.007	15.829	17.924	18.780	20.100	21.660	7%

* Forecast based on first 9 months (rounded by 5,000)
 ** Forecast based on input important indicators & offices abroad and development past years



FORECAST OVERNIGHT TOURISM 2020				
ALL ACCOMMODATIONS				
	Guests (x 1,000)			
	2018	2019	2020*	+/-
Domestic	25.132	25.787	16.500	-36%
Inbound				
Europe	14.974	16.051	5.140	-68%
- Germany	5.689	6.175	2.900	-53%
- Belgium	2.398	2.507	768	-70%
- United Kingdom	2.212	2.402	480	-80%
- France	893	963	260	-73%
- rest of Europe	3.782	4.004	730	-82%
America	2.072	2.181	345	-84%
- USA	1.480	1.564	250	-84%
Asia	1.360	1.473	205	-86%
- China (incl. Hong Kong)	333	369	45	-87%
other continents	375	424	65	-85%
Subtotal inbound	18.780	20.125	5.750	-71%
Total	43.913	45.916	22.250	-52%

* Forecast 2020 of domestic & inbound tourism (rounded by 5,000)

But...

The image didn't change:

...NL is easy to reach

...NL is safe and comfortable

...NL offers a wide range of tourist and leisure activities

...Interesting for different target audiences – all year round

...we stand together – here and now!



Reiseperspektiven jetzt und in Zukunft
Travel perspectives now and in the future
17.11.2020

11 days to go | November 17, 2020 | Duration: 1 day | Germany Online

Virtual Travel Trade Event - Germany

This Virtual Travel Trade Event (VTTE) is brought to you by the Netherlands Board of Tourism & Convention together with Dutch Travel Trade partners. This first edition focusses on the German market specifically.

The main destinations and their partners offer their expertise and services to get you up to speed for 2021 and 2022 in this virtual setting. Besides that, general information on the 2021/2022 themes and story lines is being presented, interactive break outs are offered and one on one meetings with the partners are provided.

On behalf of all participating partners, we welcome you on this platform and wish you a successful meeting. Let's explore future travel perspectives in these uncertain times together!



3. Sentiment research at holland.com



Take out:

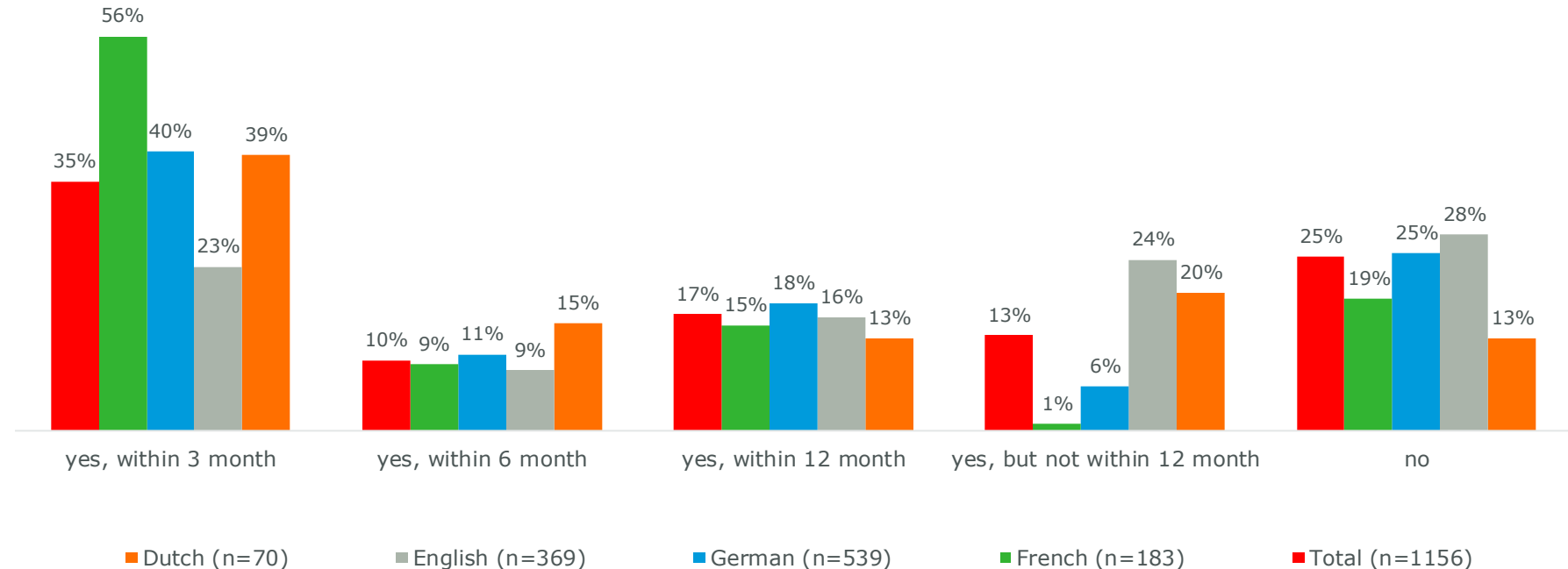
- Intention to visit NL decreases from 47% to 35%
- Corona outbreak delays holiday plans to 2021
- Also in 2021 the corona outbreak will affect the choice of holiday destination.



Travel intention NL second half of October - results per language version

Are you planning a trip to the Netherlands?

Among the visitors to Holland.com, the intention to travel to the Netherlands declined further (in the second half of September, 58% planned to travel to the Netherlands, in the first half of October this already dropped to 47%, now it's 35%). Over the next 6 months one is rosier than in the previous measurement: now 10% indicates to go to Holland within 6 months, previous measurement still 5%.



4. Short- /long-term expectation tourism to NL



Take out:

- Recovery of the German market will be faster (short term)
- Trend towards even more short holidays is a great opportunity for NL (long term)

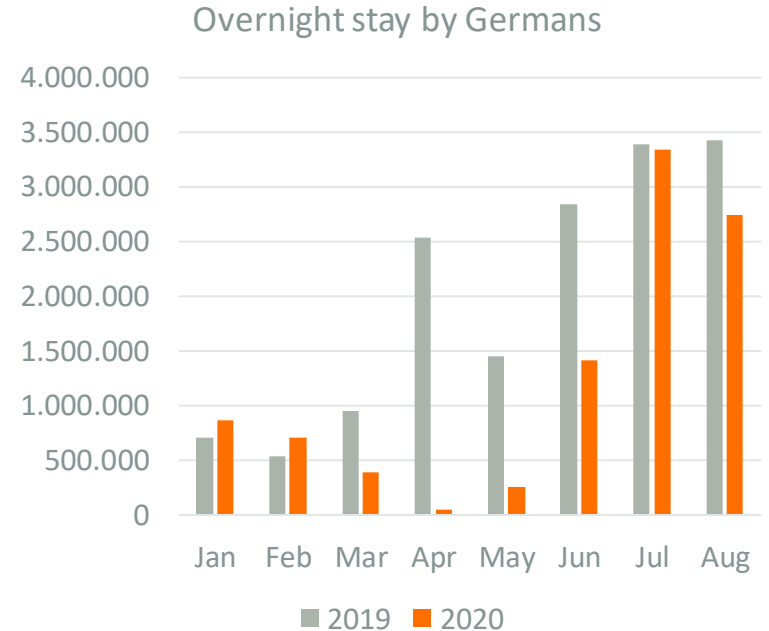


Changes for the future – short-term

- The travel behavior of tourists will change – safety first
- The mix of visitors will change as leisure travel is expected to recover quicker than business travel
- A change in booking behavior - closer to the actual trip and wish for flexible cancellation conditions
- Bigger cities are expected to recover slower than less dense areas

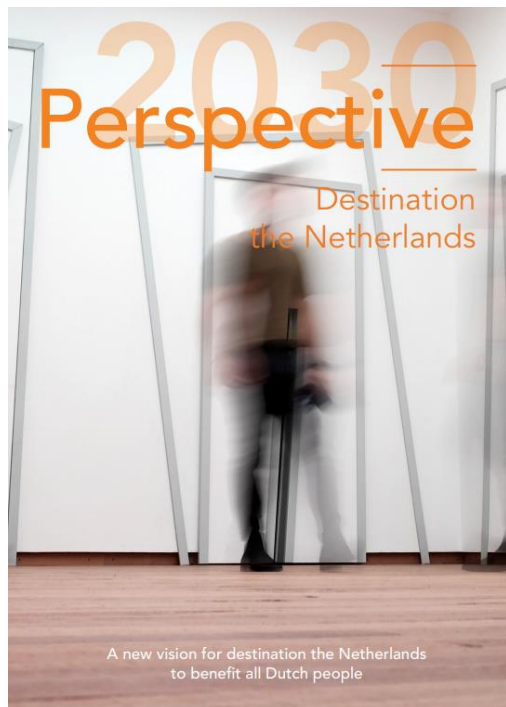
All in all – a chance to win back German visitors

- Easy to reach by car, train and coach
- Next to the coast, many offers within nature and “smaller” cities



Source: Statistics Netherlands





Top 10 countries of origin inbound tourism the Netherlands 2017 and 2030

Number of visitors x 1.000	2017	Number of visitors x 1.000	2030
Germany	5.245	Germany	10.355
Great Britain	2.230	Belgium	3.335
Belgium	2.225	Great Britain	3.240
US	1.415	US	2.055
France	840	France	1.085
Italy	560	Italy	735
Spain	465	China	665
China	365	Spain	630
Switzerland	295	Switzerland	510
Ireland	220	Ireland	315

Source: Prognosis NBTC, 2018, numbers rounded up to 5,000

Check out: <https://nbt.nl/en/home/vision-strategy/perspective-2030.htm>

