



# Tourism Market Insights Netherlands: 2021

**WESGRO**  
cape town & western cape  
research

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# 1. Overview of Netherlands

Where is Netherlands? The Netherlands, or Kingdom of the Netherlands, is located in Western Europe, between Belgium and Germany, bordering the North Sea.

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Population (millions) 17.4 million (2020)

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Time Difference South Africa is one hour ahead of the Netherlands.

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Language The official language is Dutch, but English is widely spoken.

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Economy As forecasted, the economy was severely affected by COVID-19 in 2020. The Coronavirus pandemic disrupted the Dutch economy during the first two quarters of 2020. Subsequent to the easing of the restriction measures in late spring, a fractional recovery has been under way, which continued into the third quarter. Real GDP is anticipated to progress to record growth of 3.4% in 2021 and will progressively drop to around 1.3% per year in 2024-2027.

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Formal Greeting "Goedemorgen" means good morning  
'Goedemiddag' means good afternoon  
'Goedenavond' means good evening  
More informally, you may use 'hallo' ('hah low'), which means hello, or 'hoi', the equivalent to 'hi'.

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## Restaurants

Dutch manners are unpretentious and follow good basic etiquette.

The Dutch generally use a knife and fork to eat all food – sandwiches, fruit and pizza included.

Dutch people consider it rude if people leave the table during dinner.

Men would usually wait for all ladies to sit before they do.

## Professionalism

Netherlands Etiquette

Direct speaking with plenty of eye contact is common. Dutch people may come across as abrupt, but that is just their manner.

They keep excellent time and punctuality is highly regarded.

Apologies for late arrival will be accepted in good faith, but phone ahead.

Although very focused during business dealings, the Dutch also watch the time spent and tend to keep rigidly to an agenda.

While they have a reputation as formidable business people, the Dutch are also known to be scrupulously honest, and they regard bribery with distaste.

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## 2. Overview of the Dutch Travel Market

Largest Cities by population (2021)	1. Amsterdam: 741,636
	2. Rotterdam: 598,199
	3. The Hague: 474,292
	4. Utrecht: 290,529
	5. Eindhoven: 209,620

Disposable income EUR millions (2020)	410.7 million
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Savings As % of disposable income (2020)	19.7%
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Average Age	42.7 years (2020)
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Paid Holidays (2020)	20.0
Public Holidays (2020)	9.0
Annual Leave (2020)	29.0

Outbound Departures ('000 trips)	2016: 29,687
	2017: 31,751
	2018: 33,090
	2019: 33,887
	2020: 11,602
	2021: 16,698

Type of Outbound Trips (2020)	Leisure: 84.1%
	Business: 15.9%

### Top 10 Outbound Destinations

'000 trips	2016	2017	2018	2019	2020	2021
France	4,063.6	4,315.3	4,730.1	4,840.3	2,040.0	3,072.0
Germany	4,477.1	4,588.3	4,716.9	4,820.1	1,632.7	2,255.2
Italy	1,826.6	2,100.5	2,163.8	2,171.6	1,255.2	2,010.2
Austria	1,862.9	1,934.7	2,001.1	2,074.4	1,362.8	1,300.5
Belgium	1,854.5	1,930.8	1,889.8	2,133.3	491.8	1,233.0
Spain	3,355.0	3,704.5	3,855.3	3,596.3	927.6	1,043.2
United Kingdom	1,787.7	1,910.6	1,769.5	1,801.6	399.5	611.3
Turkey	896.5	789.0	999.8	1,117.6	315.3	566.1
Greece	770.7	947.2	1,015.0	817.8	256.6	400.0
US	674.5	700.9	725.3	727.2	111.3	316.8

Source: Euromonitor International, 2021

### 3. Dutch Outbound Travel Trends

The COVID-19 pandemic and initiatives to contain the spread of the disease impacted severely on tourism in the Netherlands. As stated by research conducted by the Netherlands Board of Tourism & Conventions (NBTC), 39% less Dutch residents planned to go on a long summer vacation (one week or longer), either in the Netherlands or overseas, in 2020 compared to 2019. Dutch residents specifically pointed out that travel restrictions and overall hesitation was their main constraints.

In 2020, outbound departure volumes decreased by 65.8% to 11,602 million trips. The shift to digital activity also hindered the recovery of business travel. Over the 2021-2026 forecast period, outbound departure volumes are set to only reach 2019 levels by the year 2024 with 34,382 million trips anticipated.

#### Needs of the Dutch Traveller

The Dutch love bicycles, therefore cycle tours would definitely hold great appeal, as would tracks that include wildlife viewing.

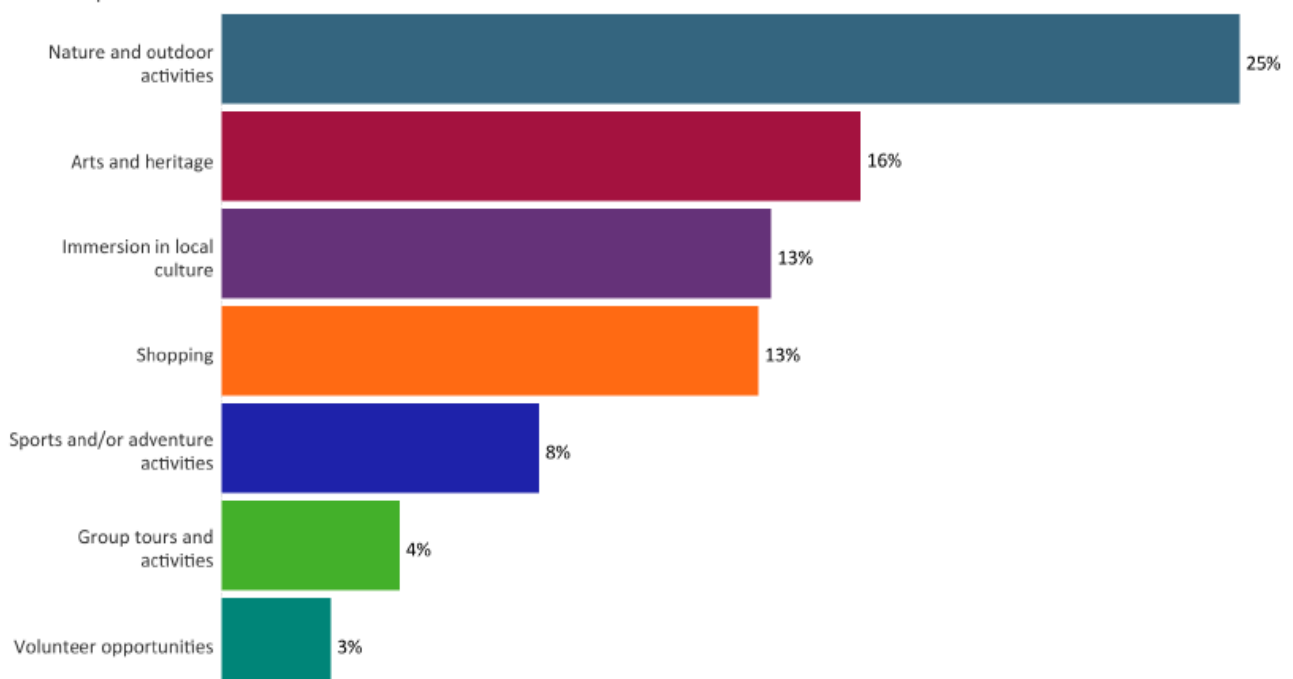
They also enjoy a sensible amount of free time, thanks to considerate leave policies. According to the September 2020 Euromonitor Lifestyle Survey, 49% of respondents feel it is important to spend their money on experiences. Dutch consumers are more likely to choose curated experiences that are custom-made to their needs.

Furthermore, the Dutch are keen international travellers, the survey also found that preCOVID-19, around 67% went overseas for leisure at least once a year. Relaxation (32%) ranked as their top travel destination feature followed by city breaks (27%), a particularly popular type of travel among the Dutch. Additional destination features in the top five included all-inclusive hotels & resorts (17%), family orientated/child-friendly (17%) and a safe destination (16%).

Most important travel destination activities

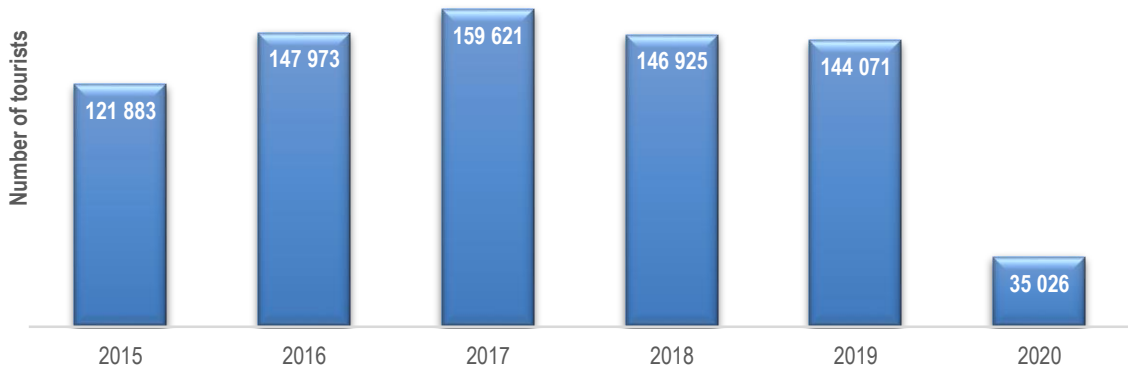
n= 1,005

% of respondents



## 4. The Dutch Traveller to South Africa

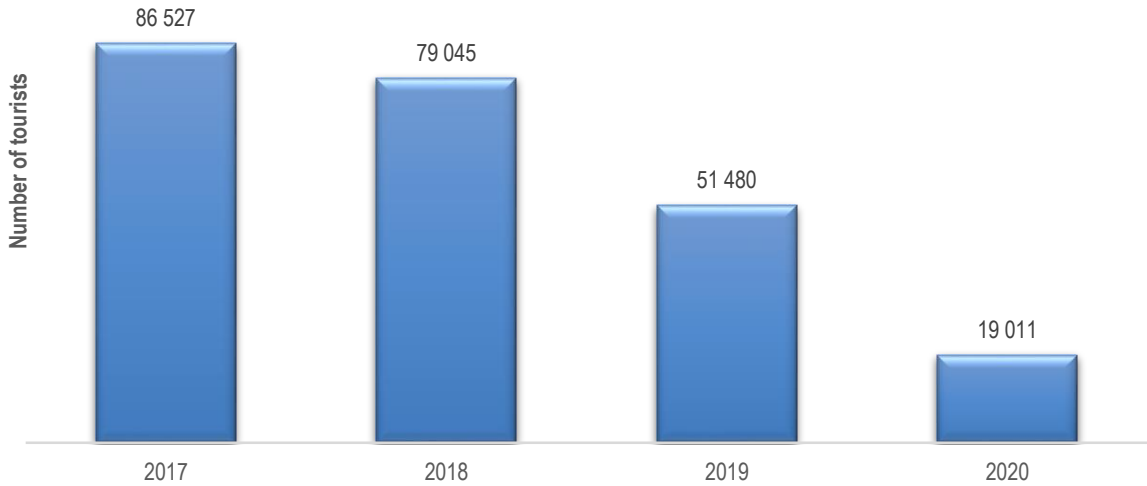
DUTCH TOURIST ARRIVALS TO SOUTH AFRICA, 2015-2020



Purpose of visit to South Africa (2020)	Holiday: 59,1% Visiting friends & Relatives: 19,8% Business Traveller: 6,9%
Average length of stay in South Africa (Number of nights)	2018: 19,6 2019: 18,2 2020: 19,2
Age profile (2020)	18-24 years: 14,7% 25-34 years: 25,9% 35-44 years: 17,1% 45-54 years: 14,4% 55-64 years: 16,8% 65+ years: 11,2%
Repeater Rate of Netherlands Travellers (2020)	First time: 60,4% 2-3 times: 19,5% 4-5 times: 8,6% 6-9 times: 6,6% 10 or more times: 4,9%
Accommodation Usage (2019)	Hotels: 570,943 Friends & Family: 412,017 Guest Houses: 272,941
Total Foreign Direct Spend in South Africa: (R in billions)	2018: R2,5 2019: R3,1 2020: R0,8
Average Spend in South Africa	2018: R21,300 2019: R25,900 2020: R24,900
Top activities undertaken in South Africa (2020)	Adventure Wildlife Visiting natural attractions Beaches Theme parks

## 5. The Dutch Traveller to the Western Cape

DUTCH TOURIST ARRIVALS TO THE WESTERN CAPE, 2017-2020

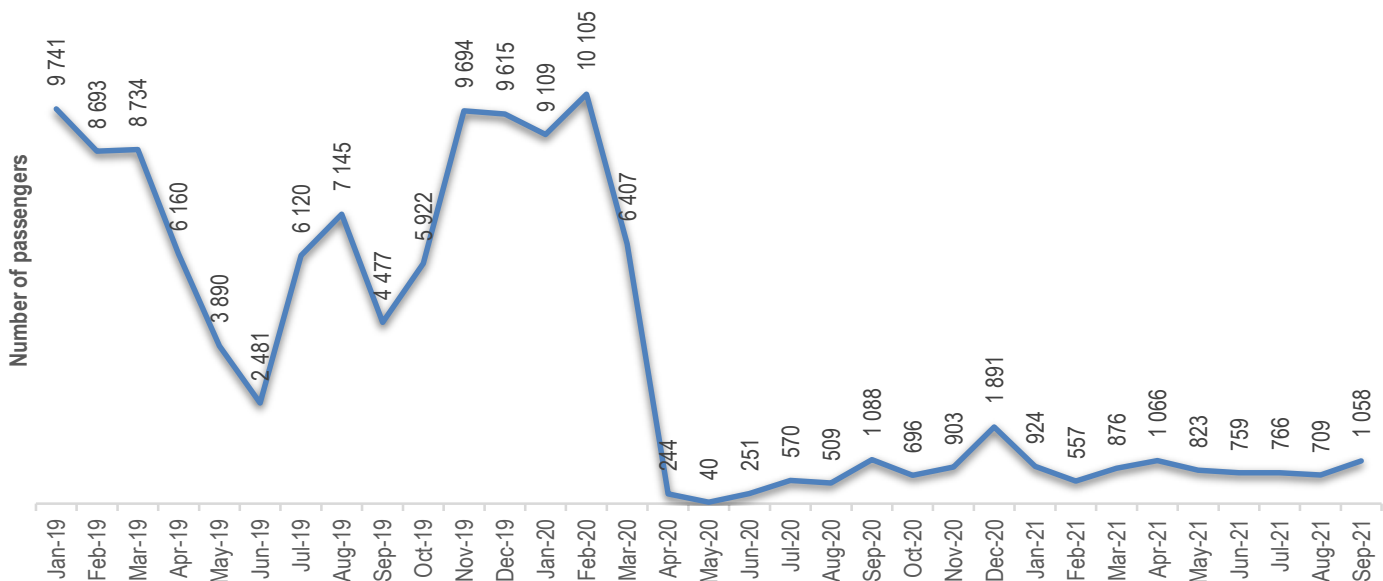


Source: SA Tourism, 2021

### 5.1 Dutch passengers through the Cape Town International Airport

During the challenging nationwide lockdown which commenced on the 27<sup>th</sup> March 2020, the tourism and hospitality sectors have been the hardest hit throughout Africa. However, the announcement of business continuity brought much hope for the Western Cape. Passenger movement indicated that the number of flights per month through Cape Town International Airport more than doubled since the start of business travel in June 2020, as airlines started to grow the domestic network to Cape Town. Over a 1,000 Dutch passengers were welcomed during September and December 2020, as well as over April and September 2021.

DUTCH PASSENGERS THROUGH THE CAPE TOWN INTERNATIONAL AIRPORT, JAN 2019-SEPTEMBER 2021



Source: OAG Traffic Analyser, 2021

## 6. Key Findings

- The COVID-19 pandemic and initiatives to contain the spread of the disease are impacting severely on tourism in the Netherlands. As stated by research conducted by the Netherlands Board of Tourism & Conventions (NBTC), 39% less Dutch residents planned to go on a long summer vacation (one week or longer), either in the Netherlands or overseas, in 2020 compared to 2019. Dutch residents specifically pointed out that travel restrictions and overall hesitation was their main constraints.
- In 2020, outbound departure volumes decreased by 65.8% to 11,602 million trips. The shift to digital activity also hindered the recovery of business travel. Over the 2021-2026 forecast period, outbound departure volumes are set to only reach 2019 levels by the year 2024 with 34,382 million trips anticipated.
- The Dutch love bicycles; therefore cycle tours would definitely hold great appeal, as would tracks that include wildlife viewing.
- They also pride themselves on their 'gezelligheid', or sociability. This is best described as the quaint pleasure of meeting and socialising in any context. Going to family pubs (or similar outings) would fall into this category, as would a cultural family event that includes them.
- Over 35,000 visited South Africa in 2020 of which 59,1% specifically travelled for holiday. Adventure, wildlife, visiting natural attractions, beaches and theme parks ranked amongst the top activities enjoyed in South Africa.
- In the Dutch market, South Africa's biggest competitors are France, Germany, Italy, Austria and Belgium. These five destinations are forecasted to rank as the top 5 destinations for outbound departures in 2021.
- By province, the Western Cape is definitely a favoured destination amongst the Dutch travellers. The Western Cape consecutively held the largest share of Dutch travellers between 2018 and 2020, in spite of the significant impact of COVID-19. The Netherlands ranked as the Western Cape's 4<sup>th</sup> largest market in 2020, accounting for over 19,000 tourists.
- Passenger movement through the Cape Town International Airport indicated that the number of flights per month more than doubled since the start of business travel in June 2020, as airlines started to grow the domestic network to Cape Town. Over a 1,000 Dutch passengers were welcomed during September and December 2020, as well as over April and September 2021.



## 7. Sources

1. South African Tourism (SAT)
2. Euromonitor International
3. OAG Airline Passenger Traffic Analyser
4. <https://worldpopulationreview.com/countries/cities/netherlands>

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