Key Insights

Insights on holiday behaviour
and business travel

Visitors from

Germany

NBTC
Netherlands Board
of Tourism &
Conventions

Welcome

We are happy to present this document full of key insights about visitors from Germany.

A significant number of international visitors to the Netherlands come from Germany. It is therefore important to understand the general holiday behaviour of Germans, the type of holidays they often take in the Netherlands, and how they perceive the Netherlands. Besides providing insights into these aspects, this document also contains an overview of current trends and developments in Germany, a SWOT analysis, and some do's and don'ts of doing business with Germans.

If you have any questions about this document or would like to know more about German visitors, please contact Martin Pohl, our German Market and Insights Manager based in Cologne, Germany.

Martin Pohl
mpohl@holland.com

Contents

Chapter 1

General holiday behaviour

This chapter is about the general holiday behaviour of visitors from Germany, not specifically on holidays in the Netherlands. It gives an overview of general information, such as how often Germans generally go on holiday, the types of holidays they take, and their booking habits.

©JAN BIJL

1.1

Holidays abroad (volume)

77 million

short trips by German residents in 2022

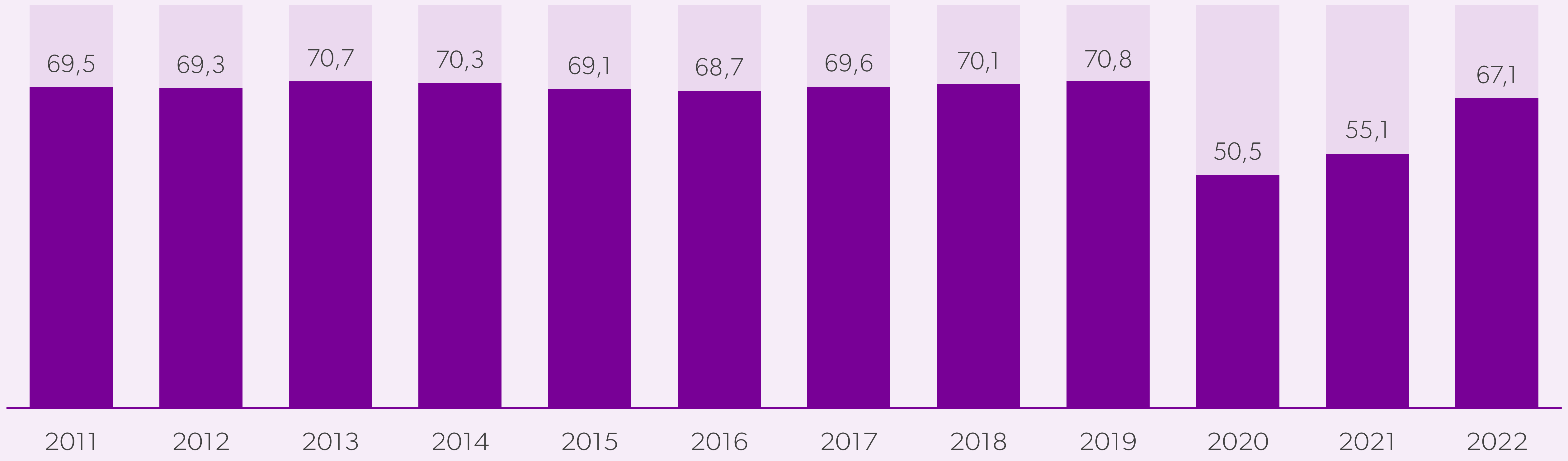
Since the mid 90s, the level of holiday travel in Germany has remained consistently high. The proportion of the population that goes on holiday at least once a year is between 75% and 79%. Only in 2020 (63%) and 2021 (68%) – during the COVID-19 pandemic – did we see a short-term decline. In 2022, the level of holiday travel returned to 75%.

In terms of the total volume of holiday trips (longer than five days), Germany almost returned to pre-pandemic level in 2022. In 2019, around 70.8 million holiday trips were registered, compared to around 67.1 million in 2022. Holidays within Germany continue to be the largest segment, with a share of around 27%. All other trips are made abroad, with Spain being the most popular destination with a share of 13%, ahead of Italy (8%) and Turkey (8%).

The volume of short trips (two to four days) is also almost back to normal. In 2022, 76.8 million short breaks were recorded, compared to 83.8 million in 2019. In contrast to holiday trips, 'only' 21% of short breaks were spent abroad; 79% of trips took place in Germany.

NUMBER OF LONG HOLIDAYS
(IN MILLIONS)

SOURCE: DRV (DEUTSCHER REISEMARKT, MARCH 2023).



1.2

Number of holidays per year

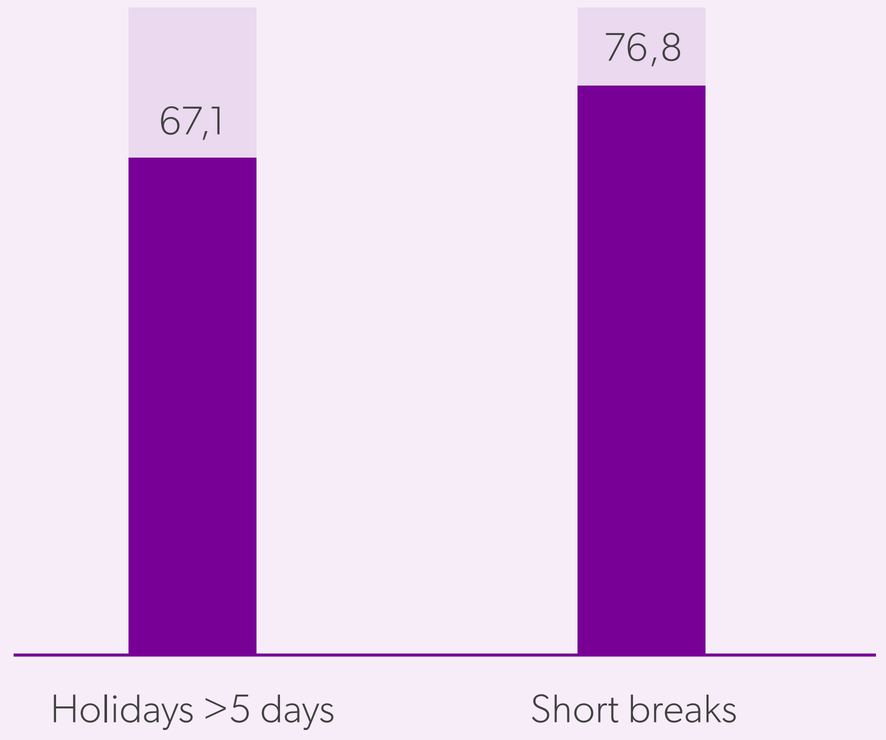
Germans made 143.9 million trips in 2022. On the basis of 52.9 million travellers in that year, each person took an average of 2.7 trips (holidays and short breaks).

2.7 trips on average

per German traveller in 2022

NUMBER OF HOLIDAYS
IN MILLIONS (IN 2022)

SOURCES: DRV, FEDERAL ASSOCIATION OF THE GERMAN TOURISM INDUSTRY, FEDERAL STATISTICAL OFFICE, FORSCHUNGSGEMEINSCHAFT URLAUB UND REISEN TRAVEL ANALYSIS (RA 2023).



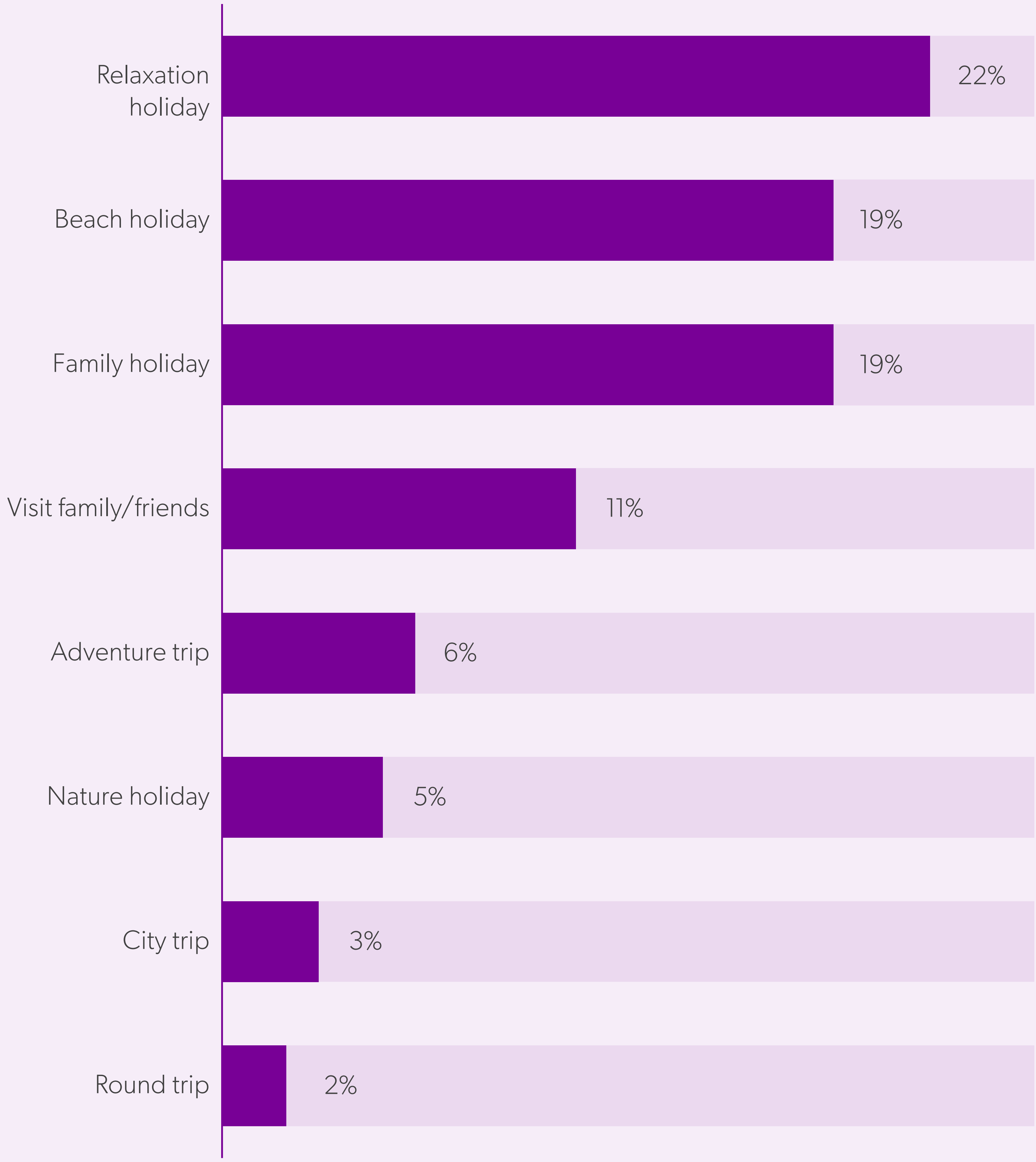
© IRIS VAN DEN BROEK

1.3
Type of holiday

While long holidays (longer than 5 days) tend to be for relaxation, recreation, and spending time with the family, short holidays are mainly for city breaks and visiting friends and relatives. In recent years, "nature holidays" have generally become more popular; this is true for both short and long holidays.

TYPE OF HOLIDAY
IN 2022 (>5 DAYS)

SOURCE: FORSCHUNGSGEMEINSCHAFT URLAUB UND REISEN TRAVEL ANALYSIS (RA 2023).



1.4

Search and booking behaviour

Search behaviour

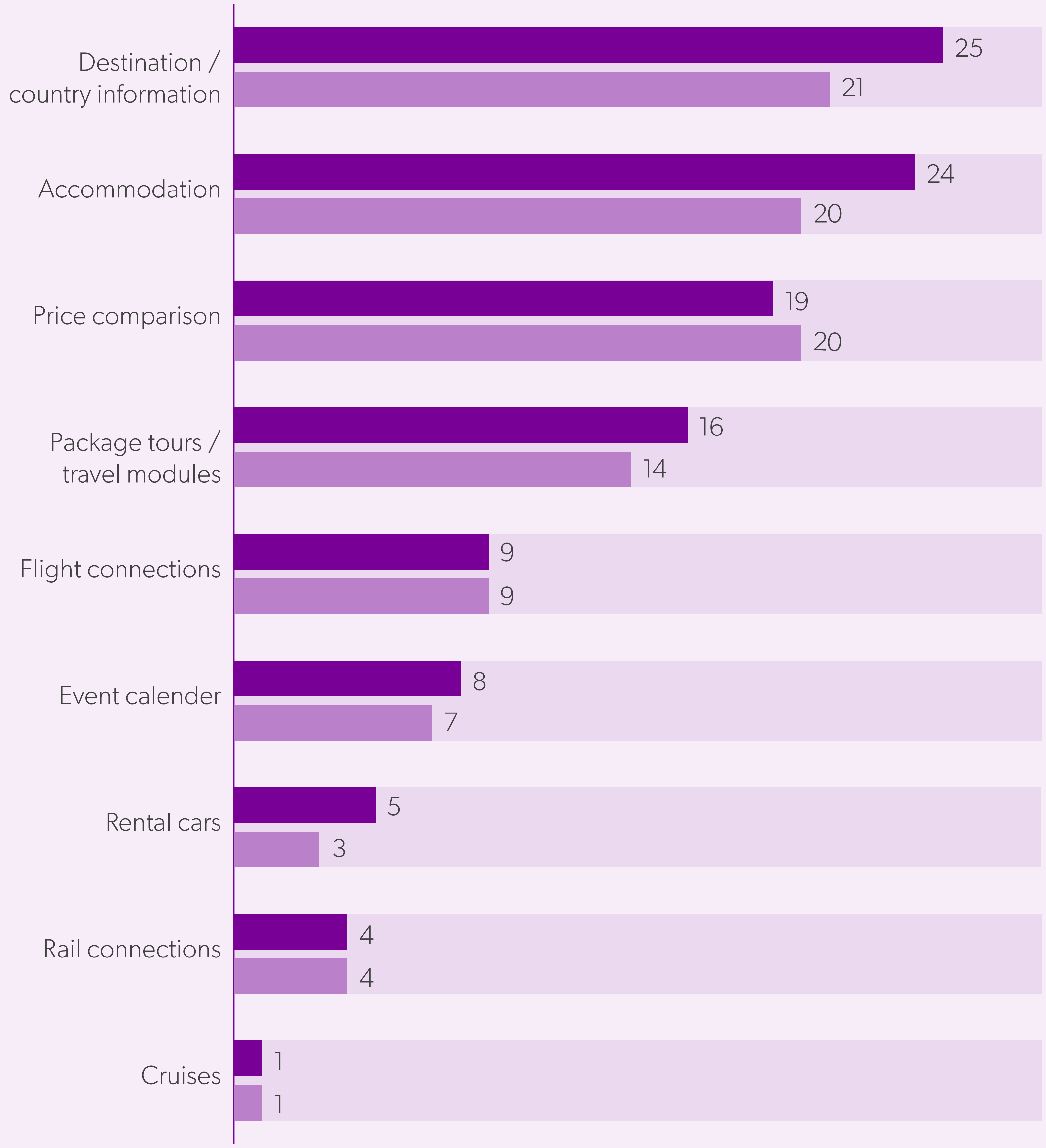
The long-standing trend of using digital channels to gather information and make bookings continued in 2022. The internet is an extremely important source of holiday information, and digital bookings account for a large proportion of all holiday bookings.

Similar to previous years, the most frequently searched for holiday information in 2022 was destination/country information, accommodation information, and price comparisons. Although slightly fewer holidays were taken in 2022 compared to 2019, there was a general increase in online searches for holiday information in 2022. This illustrates the increasing importance of the internet as a source of holiday information.

NUMBER OF INTERNET SEARCHES FOR HOLIDAY INFORMATION (IN MILLIONS)

SOURCE: FORSCHUNGSGEMEINSCHAFT URLAUB UND REISEN (RA 2023).

BASE: GERMAN POPULATION, AGED 14+ YEARS.



2022
2019

Booking behaviour

© IRIS VAN DEN BROEK

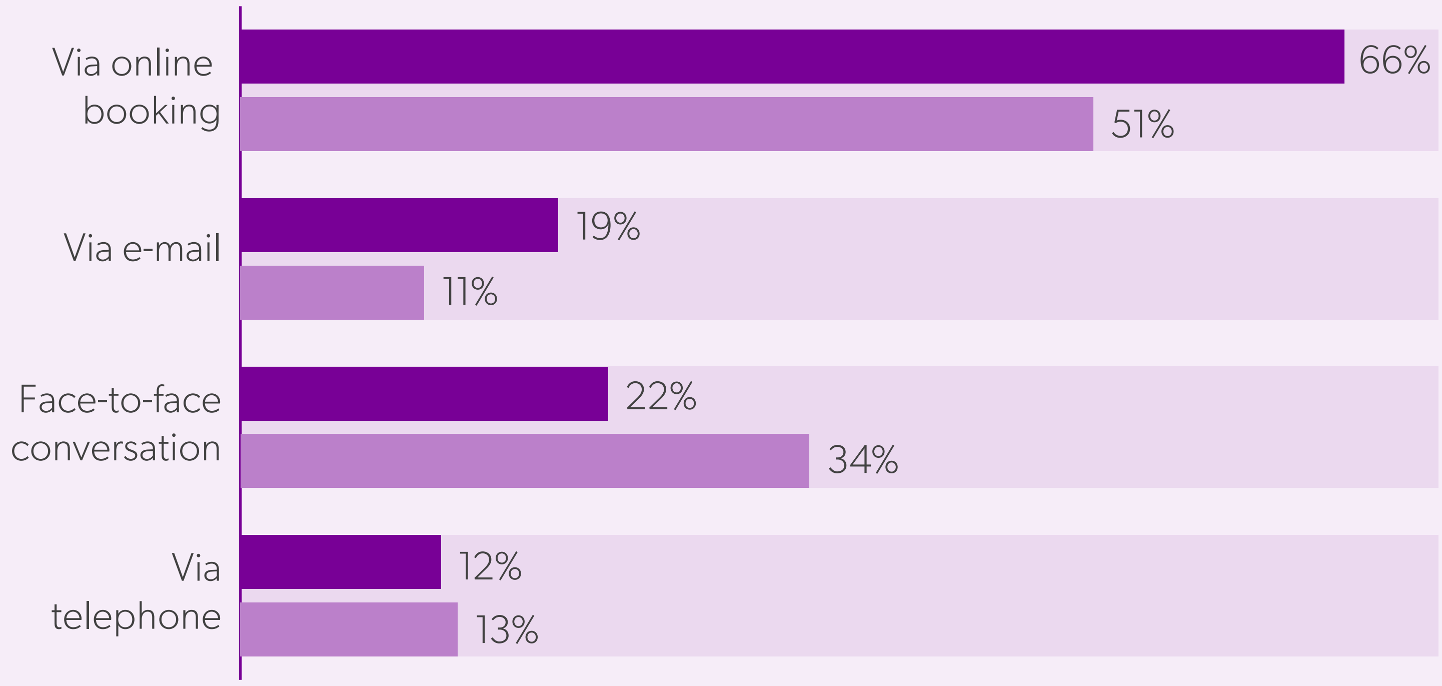
BOOKING CHANNELS FOR HOLIDAY TRAVEL IN 2022

SOURCE: TRAVEL WEEKLY; SERVICE SCIENCE; DELOITTE; KANTAR, STATISTA.

BASE: GERMAN-SPEAKING POPULATION, AGED 14+ YEARS; *WITH ADVANCE BOOKING OF AT LEAST ONE TRAVEL COMPONENT; MULTIPLE ANSWERS POSSIBLE.

Short holidays (76.8 mln.)

Holidays 5+ days (67.1 mln.)



2018 was the first year in which more holidays were booked digitally than in person (for example, at a travel agent). Online bookings have overtaken traditional booking channels since 2018 – a trend that has continued after the pandemic in 2022. In particular, 66% of short breaks (two to four days) are booked online. If we combine online and email bookings, the share of digital channels rises to 79%.

For holidays (longer than five days), online bookings also account for more than half of all booking channels (51%). When combined with email bookings, the share of digital channels rises to 57%, because multiple answers were possible when asked.

66%

of short breaks (two to four days) are **booked online**

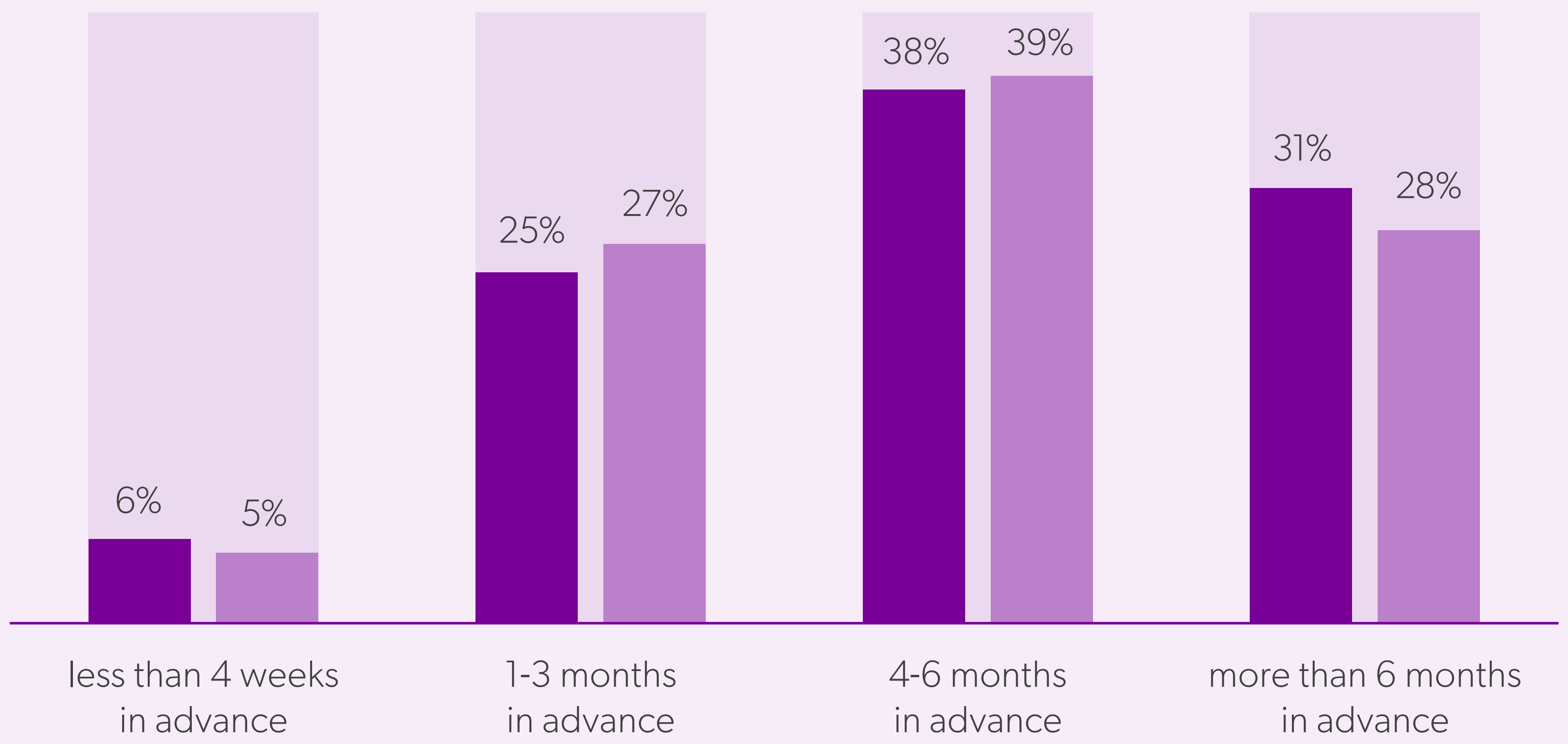
Booking window

START LOOKING
FOR A HOLIDAY

BASE: GERMAN-SPEAKING POPULATION, AGED 14+

SOURCE: FORSCHUNGSGEMEINSCHAFT URLAUB UND REISEN (RA 2023).

2019 2022

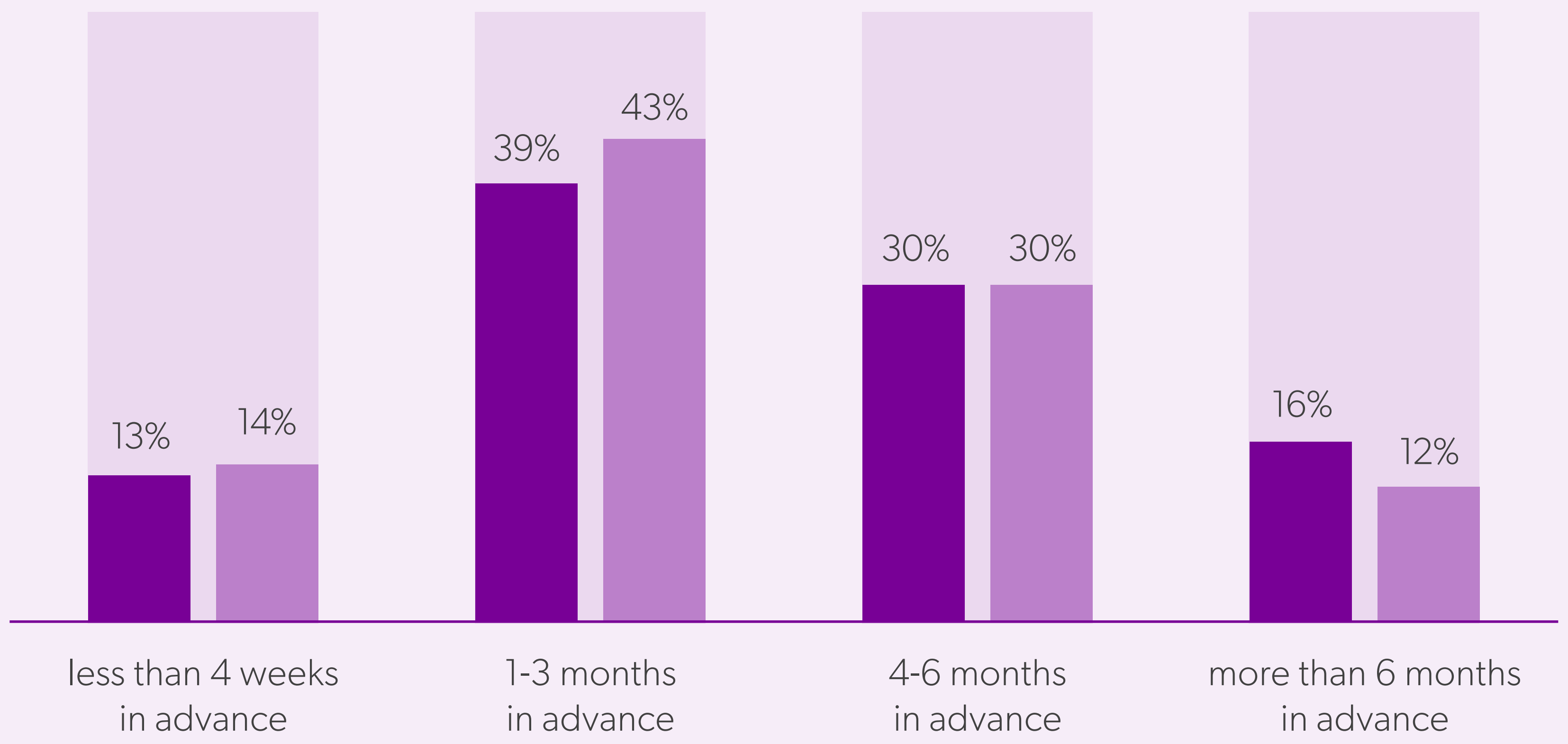


ACTUAL BOOKING
OF THE HOLIDAY

BASE: GERMAN-SPEAKING POPULATION, AGED 14+

SOURCE: FORSCHUNGSGEMEINSCHAFT URLAUB UND REISEN (RA 2023).

2019 2022

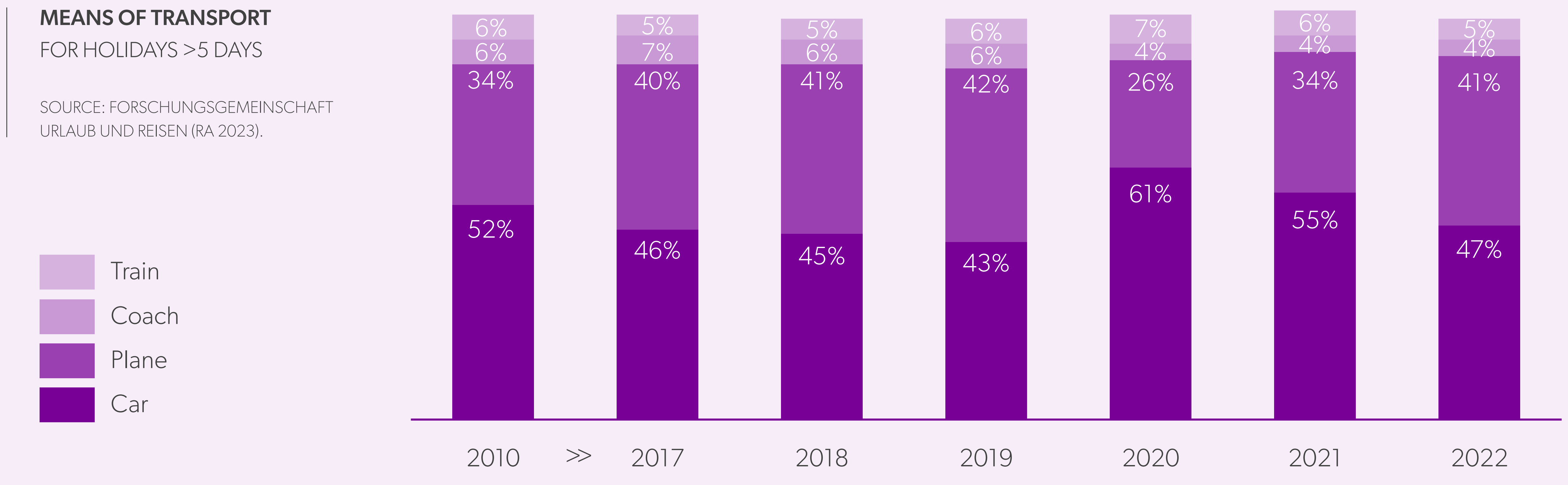


Overall, travellers are planning their holidays at slightly shorter notice than in 2019. During the height of the COVID-19 pandemic, holiday travel was planned at very short notice. Although this trend is starting to reverse, people are starting to think about and make travel decisions slightly closer to the departure date than they were before the pandemic. Short holidays in particular are often booked spontaneously. The decisive factor here is whether several travel modules need to be booked or just accommodation.

For detailed information on demand patterns, please see the Travel Trade Scan Germany.

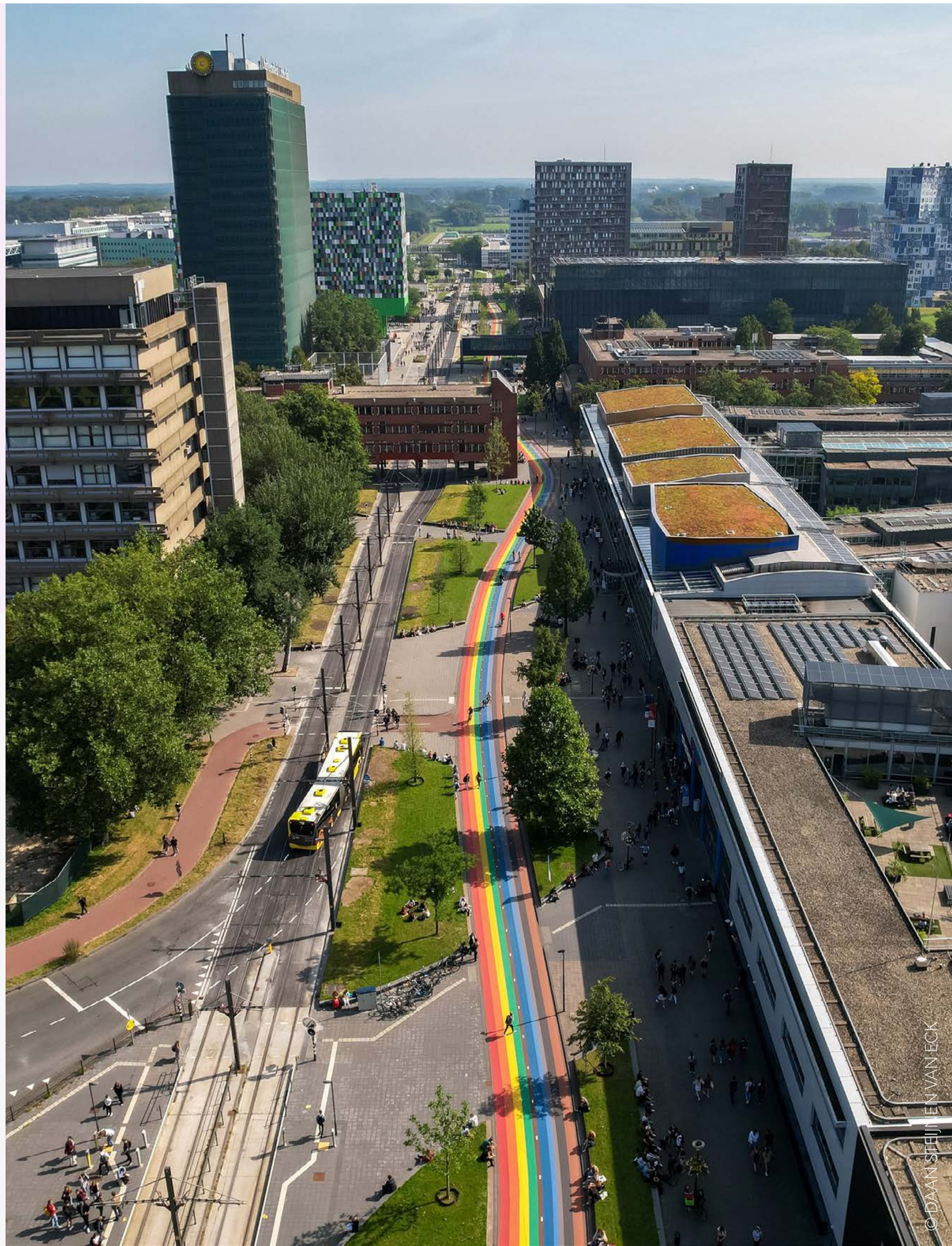
1.5

Mode of transport



For holiday trips (longer than five days), air travel has become more popular over the last 15 to 20 years – especially at the expense of car travel. Whereas car travel accounted for more than 50% of the total in 2010 and air travel for 34%, in 2019 their shares were almost equal at 43% and 42% respectively. Again, the exceptions to this are 2020 and 2021 (during the COVID-19 pandemic), when more people travelled by car.

For short holiday trips, the breakdown of means of transport in 2022 is as follows: car (68%), train (17%), plane (8%), and bus (6%). The significant increase in the share of caravans (+ 3.2 percentage points compared to 2019) and motorhomes (+ 2.5 percentage points compared to 2019) is particularly striking.

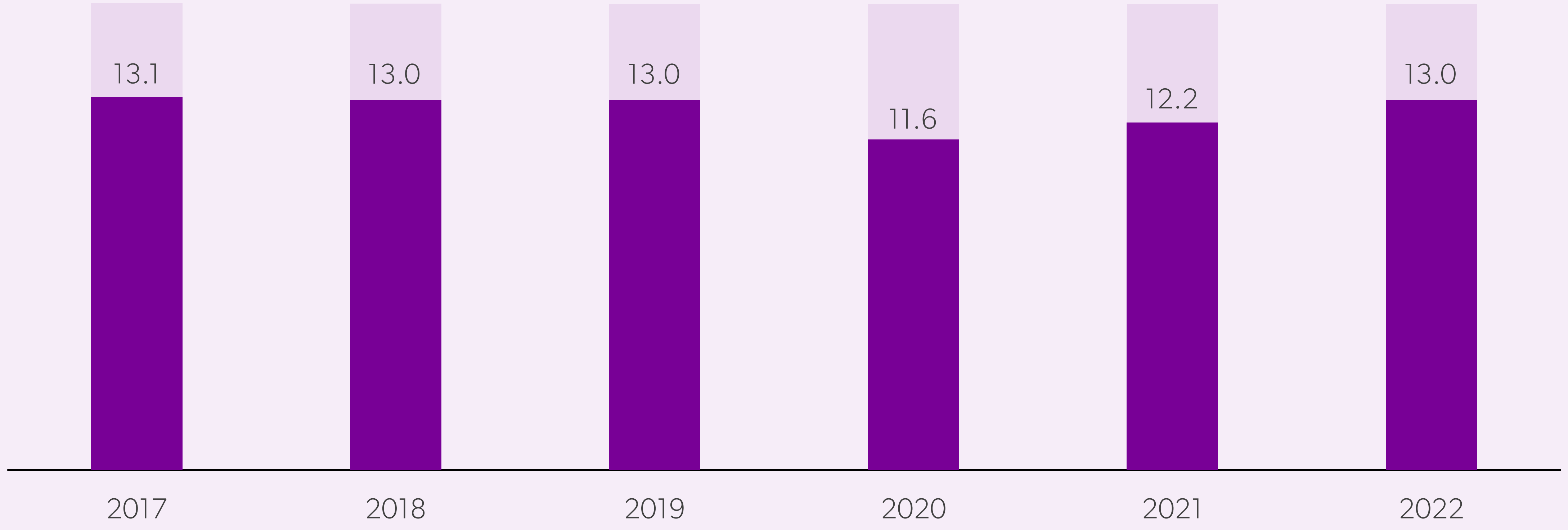


1.6
Length of stay

As regards main holidays, there has been little change in the average duration of trips in recent years, which remains at around 13 days. In the two pandemic years (2020 and 2021), the values were slightly lower at 11 and 12 days respectively, but in 2022 there was a return to previous levels.

AVERAGE HOLIDAY DURATION IN DAYS

SOURCE: FORSCHUNGSGEMEINSCHAFT URLAUB UND REISEN (RA 2023).



13 days

is the average duration of trips in recent years

1.7
Spending

© IRIS VAN DEN BROEK

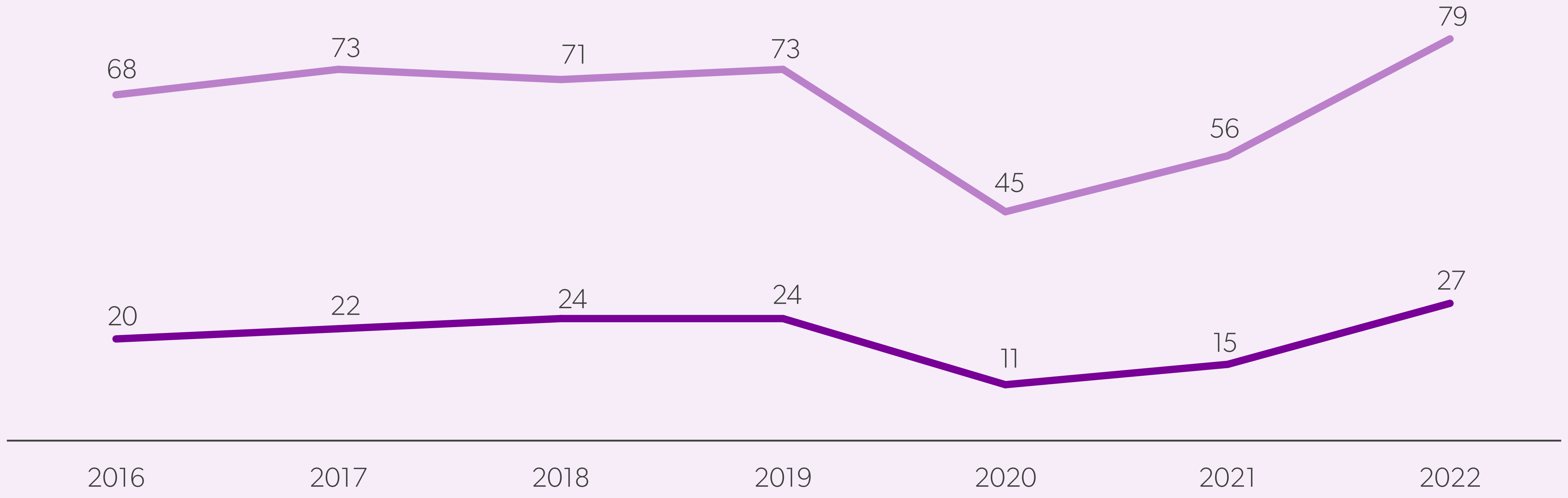
Although German holidaymakers took around 12% fewer trips in 2022 than in 2019 (both holidays and short breaks), travel expenditure rose by around 8.9%

This is due to the fact that significantly more was spent per trip, especially for short breaks, namely €348 per person in 2022 compared to €271 in 2019. Spending on longer holidays also increased from €1,017 to €1,171 per person.

The total amount spent by German travellers in 2022 was around €105.6 billion – the highest level of spending for any travel year.

SPENDING OF GERMAN TRAVELLERS IN 2022
(IN BILLION EUROS)

SOURCE: FORSCHUNGSGEMEINSCHAFT URLAUB UND REISEN (RA 2023).



Holidays
Short holidays

1.8
Holiday Sentiment Monitor

The Holiday Sentiment Monitor is a survey on holiday intentions and how current issues affect holiday planning and booking behaviour. The survey is conducted among residents of the Netherlands, Belgium, Germany, France, the United Kingdom, and the United States. Occasionally, residents of China also participate in the survey.

When do people want to go on holiday? Where do they want to go? Have they already booked? How do current topical issues influence their choices? This survey provides answers to these and many other questions. It is conducted four times a year, and the results can be found on the NBTC website.

Click here for reports and summaries in English

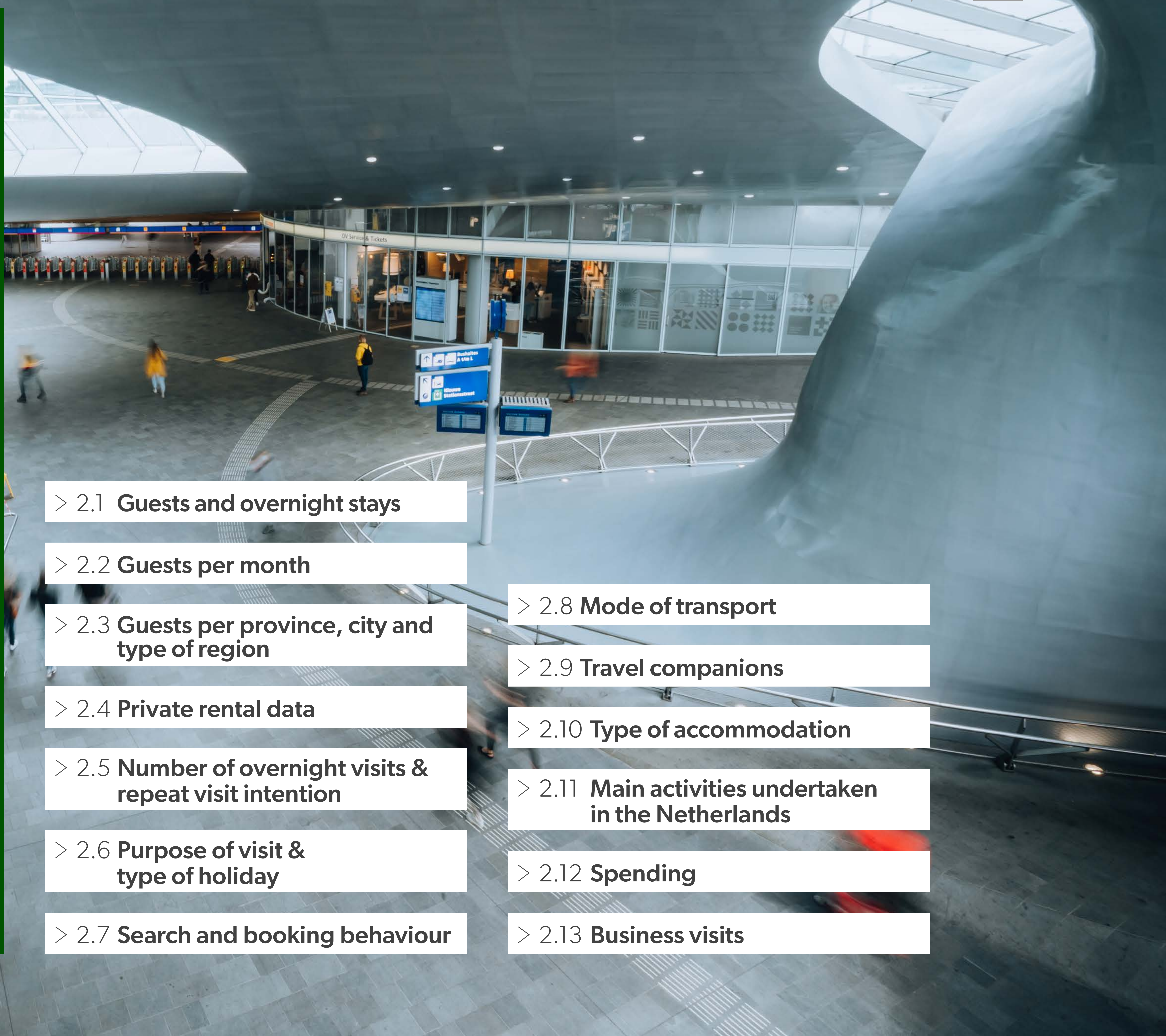
Click here for reports and summaries in Dutch


© JAN BIJL

Chapter 2

Incoming tourism to the Netherlands

This chapter on inbound tourism uses two main data sources. The first three sections are based on data from the Central Bureau of Statistics in the Netherlands (CBS data). These figures are available to the public and can be found in the 'Statline' database on the CBS website. Also included is a short section on private rental data, followed by sections on Inbound Tourism Research. This comprehensive publication focuses on international visitors in the Netherlands and has been available since June 2023. It can be found on the NBTC website.

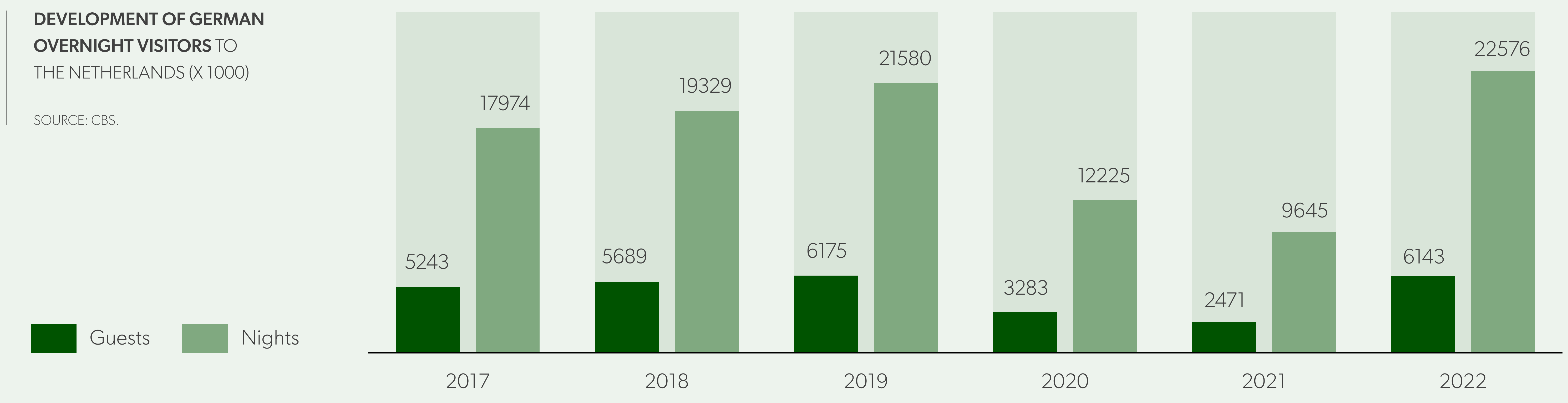


2.1

Guests and overnight stays

The Netherlands welcomed 6,143,000 German overnight visitors in 2022, more than twice as many as in 2021. The lower number of visitors in 2020 and 2021 can be attributed to the COVID-19 pandemic. This figure rebounded sharply in 2022 as European countries began to ease their COVID-19 restrictions. The number of German visitors in 2022 was still slightly lower than in 2019, but the number of nights was higher. On average, German visitors therefore stayed longer in the Netherlands in 2022 than in 2019.

In 2022, the total number of German visitors accounted for 37% of all incoming tourists to the Netherlands (16.6 million), making it the leading country for incoming visitors to the Netherlands.



2.2
Guests per month

In 2023, the number of German overnight guests in the Netherlands was the highest in the month of July. During that month almost one million Germans were on holiday in our country. In the winter months, the number of visitors was significantly lower, but thoughout the other seasons, the number of German overnight guests was high.

According to NBTC's forecast (published in January 2024), the Netherlands could welcome around a total of 7.5 million German overnight guests. This would mean an increase compared to 2023 when there were around 7.2 million visitors.

7.5 million

German overnight guests in 2024 is the forecast of NBTC

NBTC releases a forecast twice a year, in January and September.

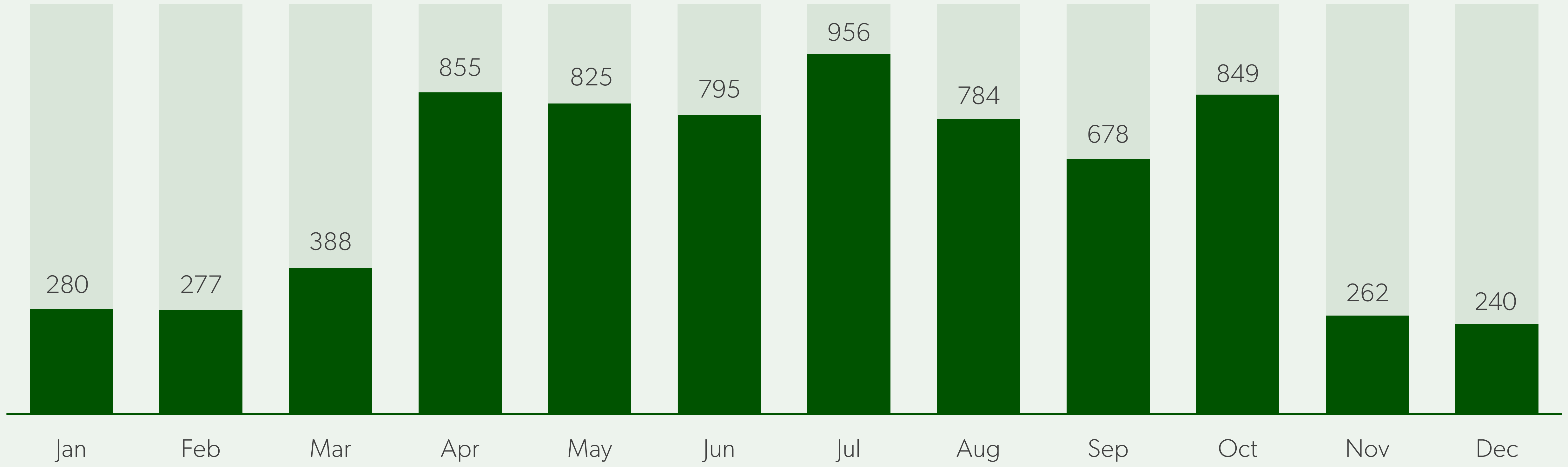
More information can be found at nbtc.nl.

© DAAN STEIJNEN VAN ECK

GERMAN OVERNIGHT GUESTS PER MONTH IN 2023* (X 1000)

* *PRELIMINARY FIGURES*

SOURCE: CBS



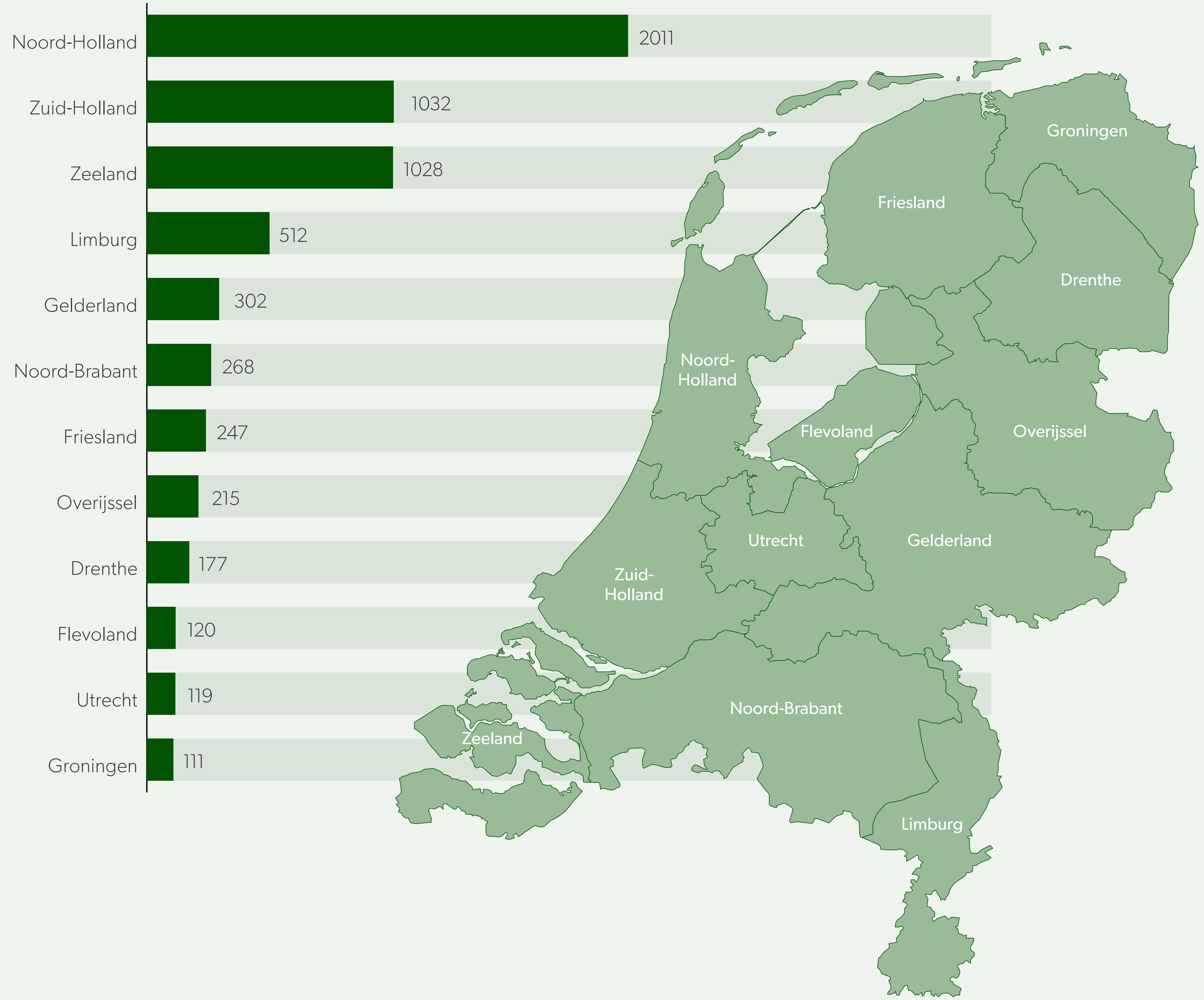
2.3

Guests per province, city and type of region

Noord-Holland is still the most visited Dutch province by German guests, which can be explained by the fact that Amsterdam – the capital of the Netherlands – is located in this province. Zuid-Holland and Zeeland follow in second and third place. It is well known that German visitors like to visit the coast, a fact that is supported by the Dutch coastal provinces ranking in the top three. Together, these provinces accounted for around two thirds of all German visitors in 2022.

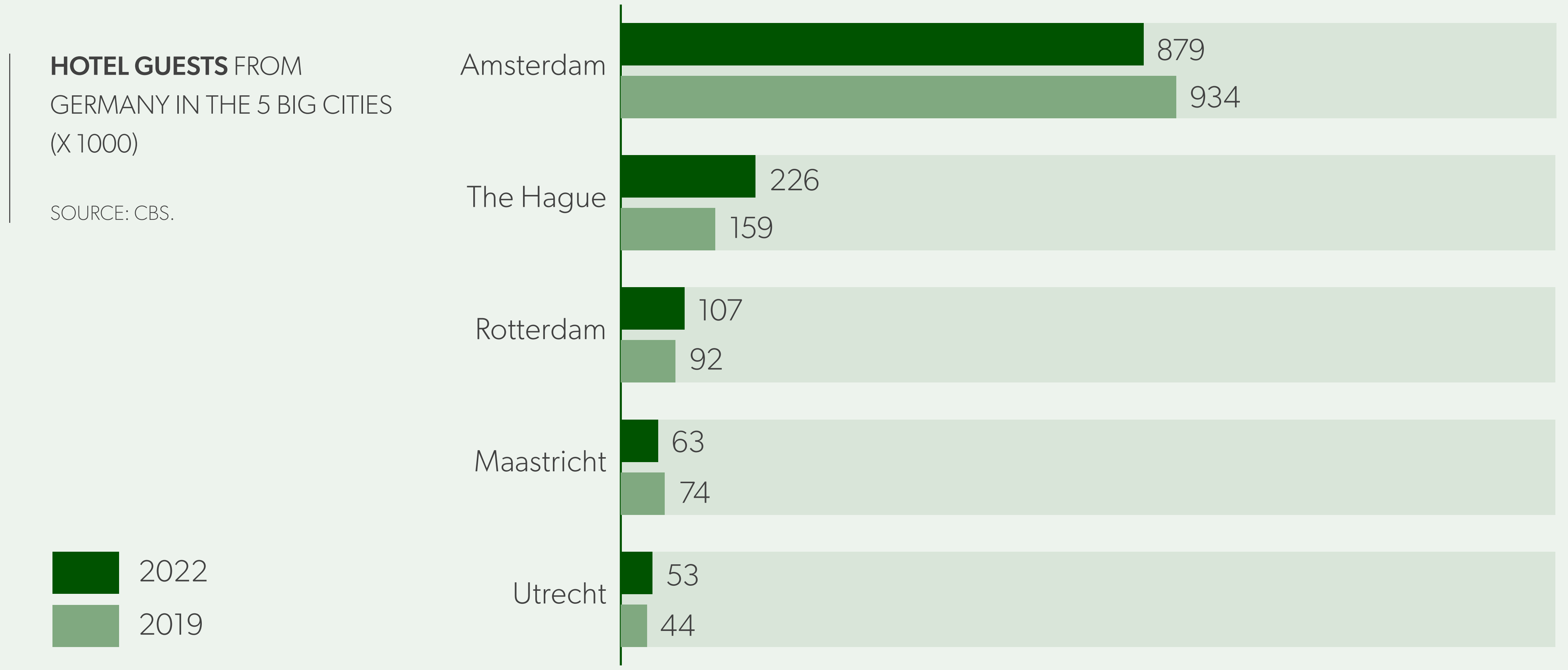
GERMAN OVERNIGHT GUESTS PER PROVINCE
IN 2022 (X 1000)

SOURCE: CBS.

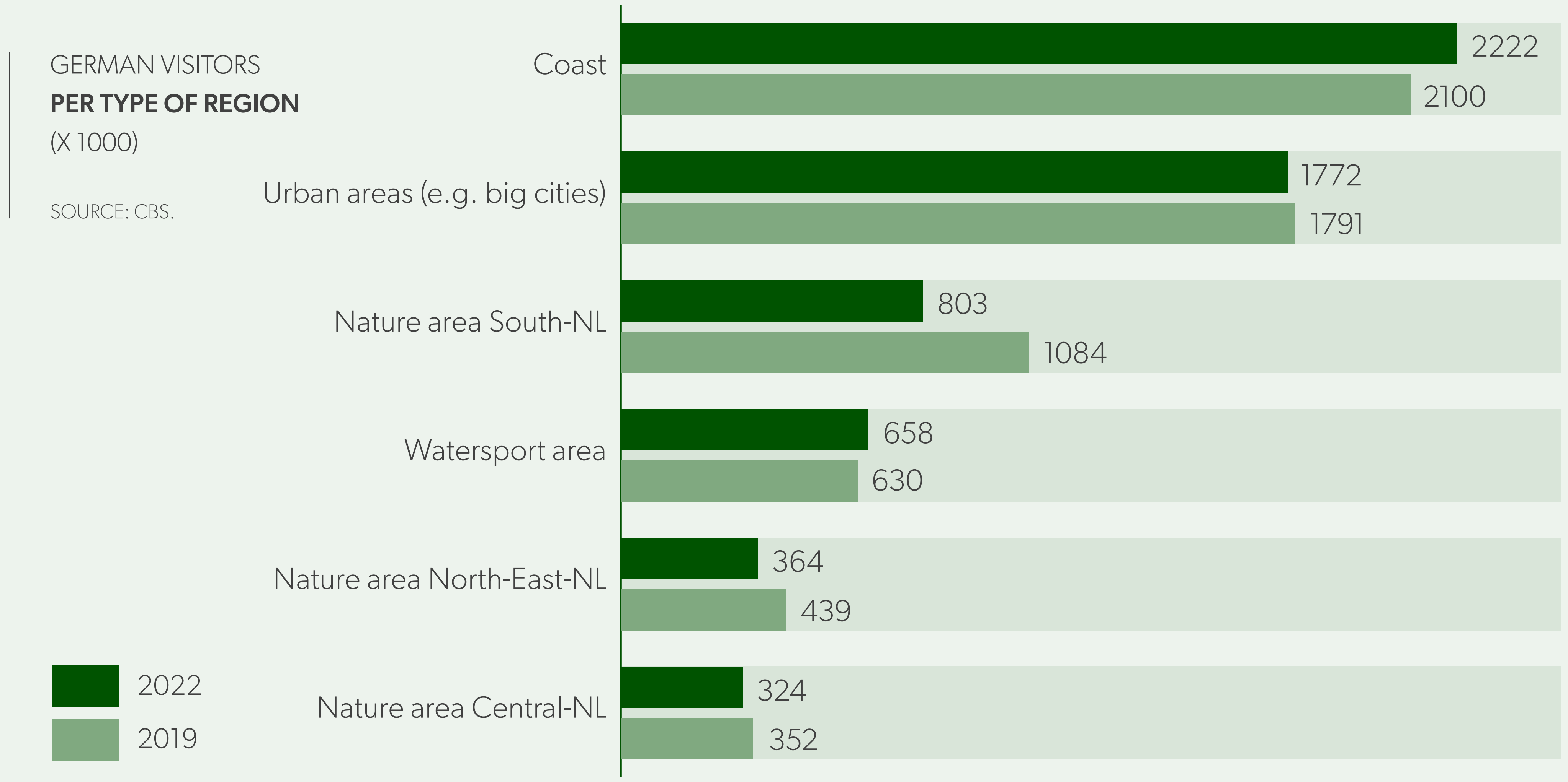


Guests per province, city and type of region

Compared to other cities, Amsterdam registered by far the most German guests. In 2022, 29% of all German hotel guests in the Netherlands stayed in the capital. Furthermore, in 2022, The Hague had the highest recovery rate (142% of 2019 level); Maastricht had the lowest (85% of 2019 level).



The most popular area of the Netherlands visited by Germans in recent years is the coast. In 2022, coastal destinations attracted 36% of all German visitors to the Netherlands. The second most popular destination type is 'urban areas', which includes the big cities. There is a significant difference between coastal and urban areas in terms of how long German visitors stay; in 2022, the average stay in coastal areas was 4.8 nights and in urban areas 2.3 nights. The other types of areas vary between 3.2 and 4.3 nights.



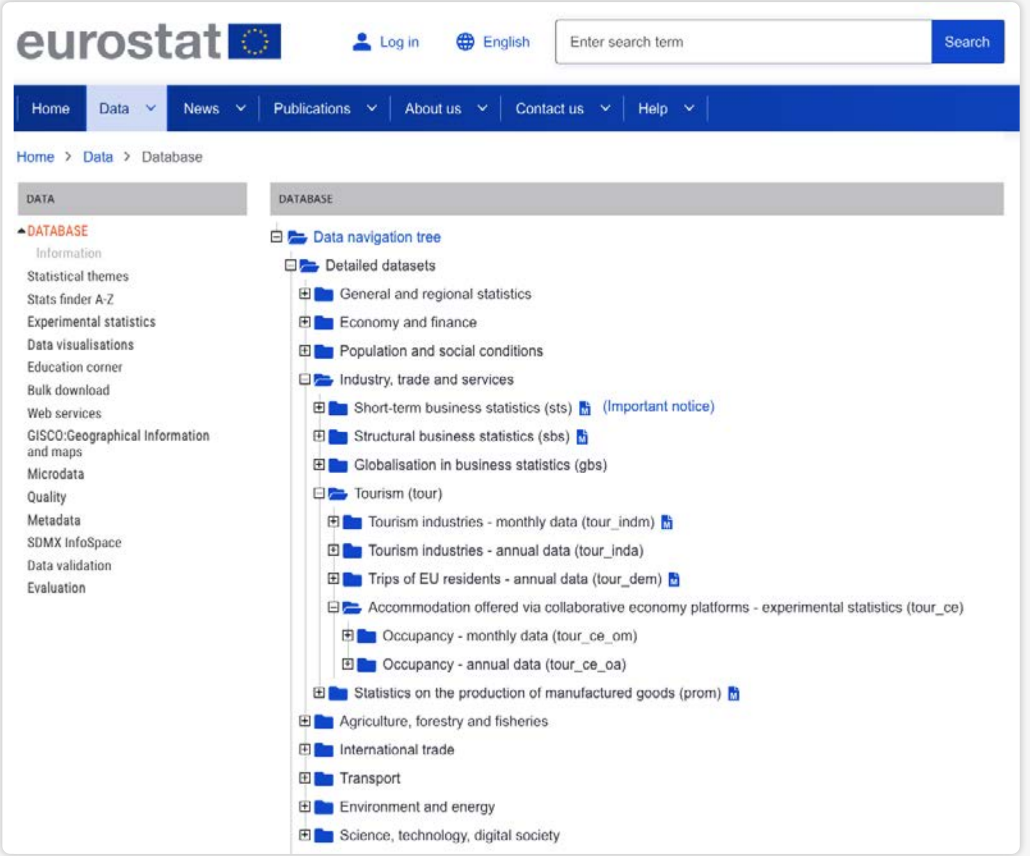
2.4

Private rental data

The CBS data in the previous graphs provides insight into the figures relating to the number of guests and overnight stays in accommodation in the Netherlands. However, it does not include all types of tourist accommodation, such as private rentals offered through online platforms. With the increased use of these online platforms, the need for figures and data is growing. Eurostat has launched a project to gain structural insights into private rentals, for which Airbnb, Booking.com, Expedia, and TripAdvisor have made data available.

To find out more about the private rental Eurostat data, visit the public database :

> *Industry, trade and services*
>
> > *Tourism*
> >
> > > *Accommodation offered via collaborative economy platforms – experimental statistics*



Or visit this website for more information and an infographic of the most important insights (in Dutch).

2.5

Number of overnight visits & repeat visit intention

From this section up until section 2.13, insights are provided from the Inbound Tourism Research. The full report was published by NBTC in June 2023. The survey focuses on foreign guests who visit the Netherlands for more than one day (at least one overnight stay, whether for business, holiday, or visiting family or friends). The respondents were from 11 main countries of origin, namely: Germany, Belgium, UK, France, Italy, Spain, Austria, Poland, Denmark, Sweden and the USA. Data collection for Germany and Belgium started in 2021 and continued until October 2022. For the remaining countries, full data collection took place in 2022.

Millions of visitors from Germany and Belgium also travel to the Netherlands every year for a day trip (without staying overnight). These day visitors mainly come for recreational purposes (for example, to dine out or walk around a city) and to shop. On average, Germans spend €110 per person per day and Belgians €120 per person per day. The rest of this chapter focuses on overnight visitors, but if you want to know more about day visitors, please read this report.

This section covers the number of overnight visits and the intention to revisit.

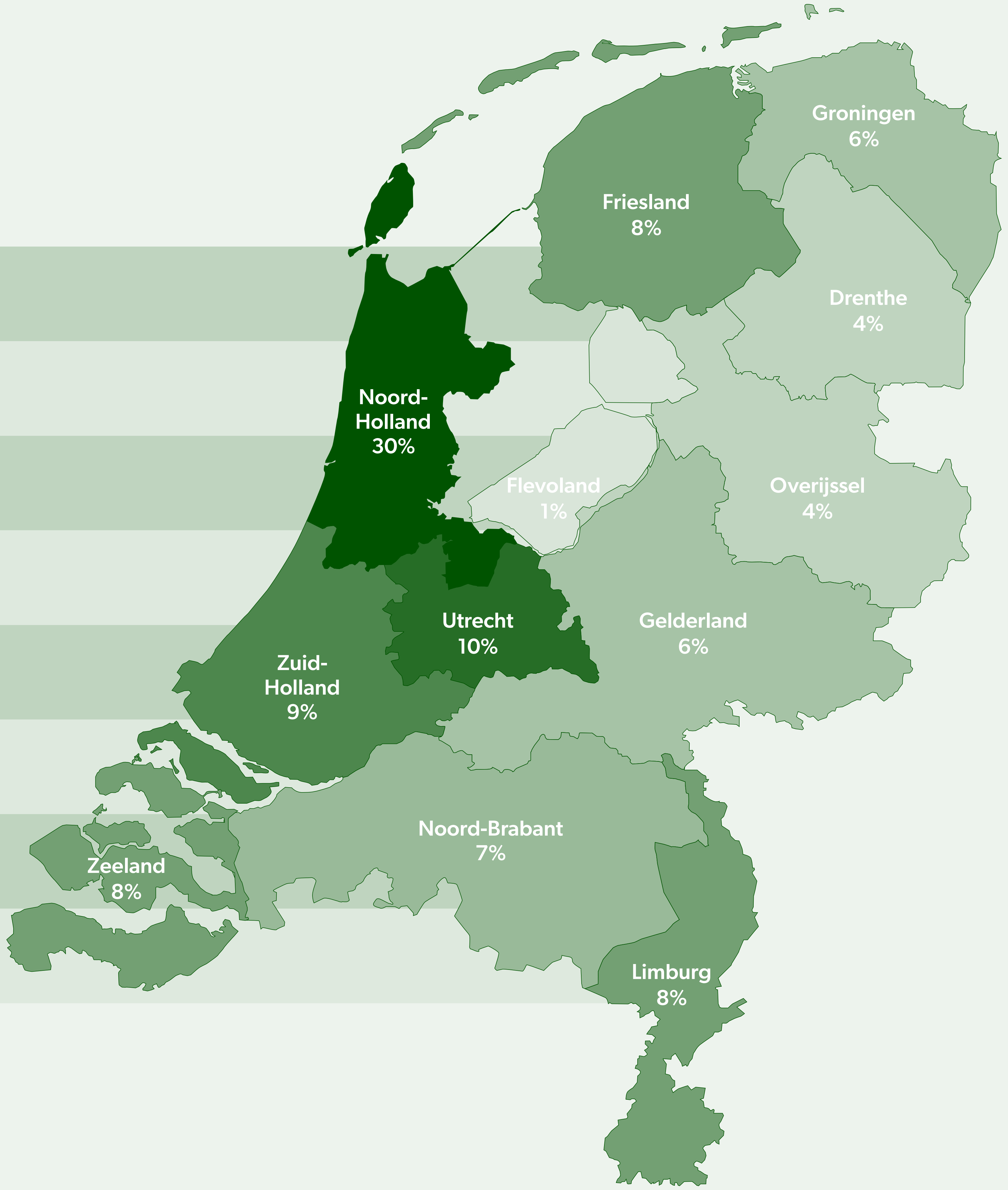
According to the Inbound Tourism Research report, 12.2 million overnight visitors from 11 countries came to the Netherlands in 2022 for a holiday, to visit family, friends, or acquaintances, and for business trips. This research has a broader scope than that of the CBS statistics (sections 2.1 to 2.3). The Inbound Tourism Research focuses on all forms of accommodation (including private rentals and stays with family, friends or acquaintances), where CBS is limited to hotels, guesthouses, bed and breakfasts, bungalow parks, campsites or group accommodation.

Number of overnight visits & repeat visit intention

Total of 11 main countries of origin in 2022:
12,218,000 overnight stays

Country	Overnight stays
Germany	5,632,000
Belgium	2,117,000
United Kingdom	1,136,000
United States	952,000
France	780,000
Italy/Spain	687,000
Austria/Poland	681,000
Denmark/Sweden	232,000

SOURCE: NBTC, INBOUND TOURISM RESEARCH 2022.

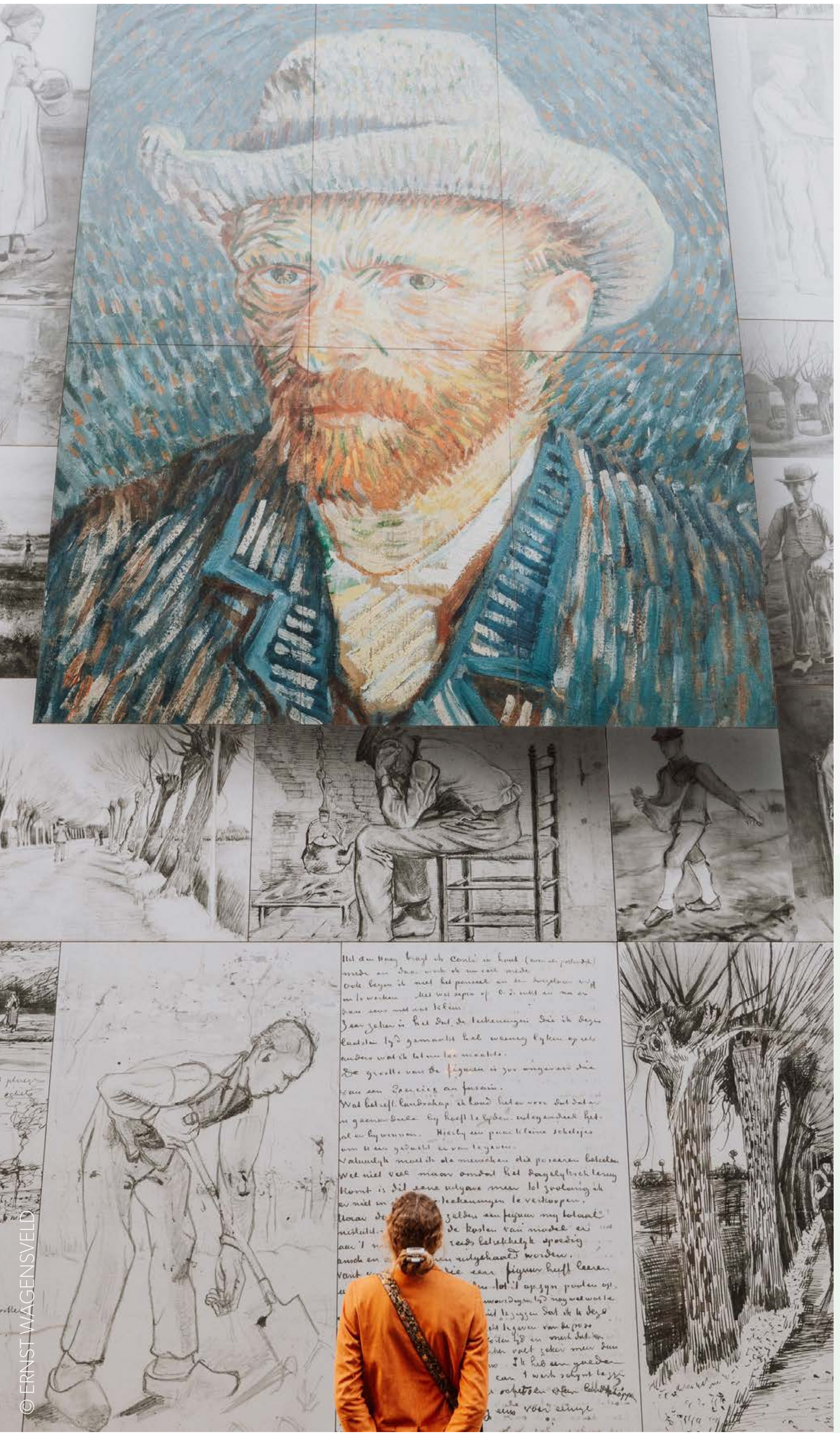


Around three out of ten overnight visits take place in the province of Noord-Holland, making it the main destination province. For more than three quarters (77%) of the overnight visits in this province, Amsterdam is the overnight destination of choice. Noord Holland is followed by the provinces of Utrecht (10%), Zuid-Holland (9%), Zeeland (8%), Limburg (8%) and Friesland (8%).

Around 40% of overnight visitors from Germany come from Nordrhein-Westfalen and Niedersachsen, the western German states bordering the Netherlands. There are also relatively large numbers of visitors from the states of Baden-Württemberg (11%) and Bayern (10%).

Visitors to the Netherlands were asked whether they planned to visit the country again in the future, and their responses were predominantly positive. In general, two-thirds of visitors say they will definitely visit the Netherlands again, and another quarter say they are likely to do so. This also applies to German visitors.

2.6
Purpose of visit & type of holiday



© ERNST WAGENSVELD

Visitors from all countries surveyed most frequently cite holiday/leisure as the reason for visiting the Netherlands. This also applies to German visitors (80%). Furthermore, 16% travelled to the Netherlands to visit family, friends, or acquaintances at home and 4% visited for business purposes.

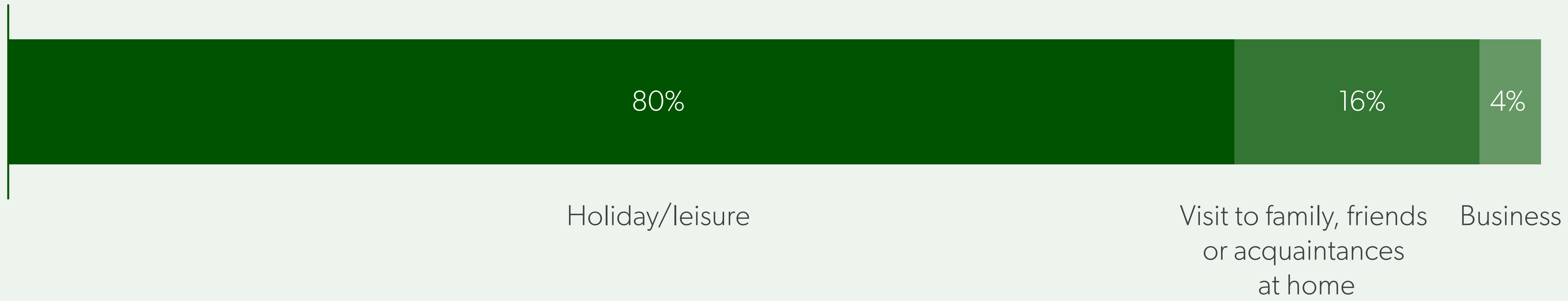
When analysing the share of visits for business purposes, it is important to bear in mind that the collection of data took place in 2022 (and partly in 2021 for Germany and Belgium), when the business travel market had not yet fully recovered from the COVID-19 pandemic. Of all visits from Germany to the Netherlands for non-business purposes, 30% are city trips, followed by beach holidays (24%) and nature holidays (12%). German visitors travel to the Netherlands relatively often for beach holidays, as the average of the 11 countries for this type of holiday is 17%.

Type of leisure holiday taken by German visitors

City trip	30%
Beach holiday	24%
Nature holiday	12%
Relaxation	7%
Entertainment	7%
Visit friends/family/ acquaintances	7%
Cultural holiday	5%
Active/sports holiday	5%
Other	3%

MAIN REASONS GERMAN VISITORS COME TO THE NETHERLANDS

SOURCE: NBTC, INBOUND TOURISM RESEARCH 2022.

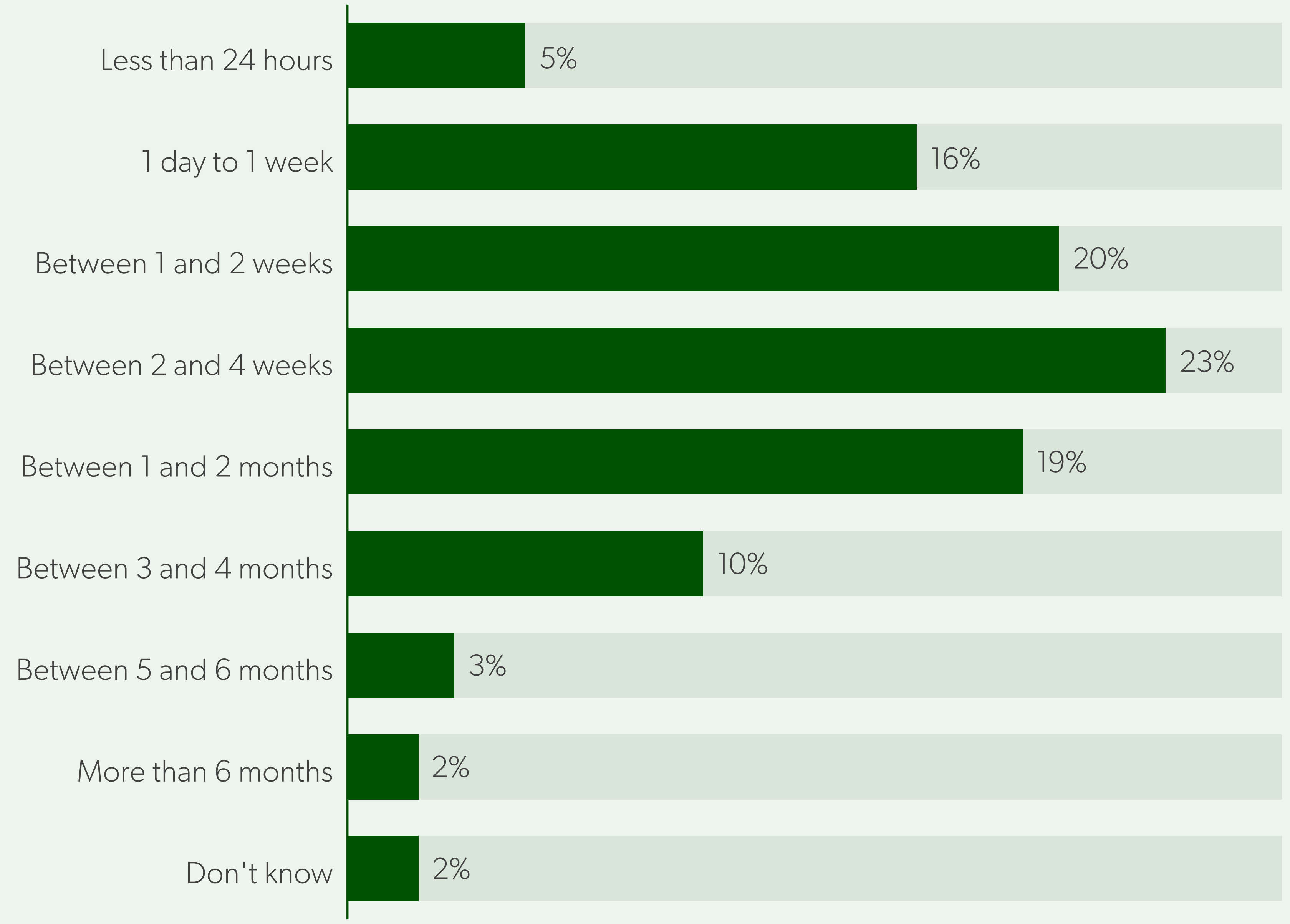


2.7

Search and booking behaviour

HOW FAR IN ADVANCE DO GERMAN VISITORS PLAN THEIR TRIP?

SOURCE: NBTC, INBOUND TOURISM RESEARCH 2022.



When preparing for a trip to the Netherlands, a search engine (such as Google) is generally the primary source of information. This is also the case for Germans (33%). Other important sources for Germans are tips and recommendations from friends and family (27%) and social media (17%). In addition, 18% draw on their own past experience.

In terms of planning, more than 60% of visitors from Germany plan their trip to the Netherlands between one week and two months in advance; 21% plan their trip up to one week in advance. Uncertainty caused by factors such as the COVID-19 pandemic, the war in Ukraine, and/or inflation may explain the high proportion of overnight visitors who plan their trip closer to the date of departure. Furthermore, Germans also plan last-minute trips to the Netherlands when the weather is nice.

Leisure visitors (holiday/recreation, visiting relatives, friends, or acquaintances) were asked whether their overnight stay in the Netherlands was part of a package holiday. A package holiday is where a single travel or booking organisation, such as an online travel agent or a tour operator, is paid a total amount for a combination of components such as transport, accommodation, activities, etc. Among non-business visitors from Germany, 32% come to the Netherlands as part of a package holiday. This compares with an average of 37% for the 11 countries surveyed.

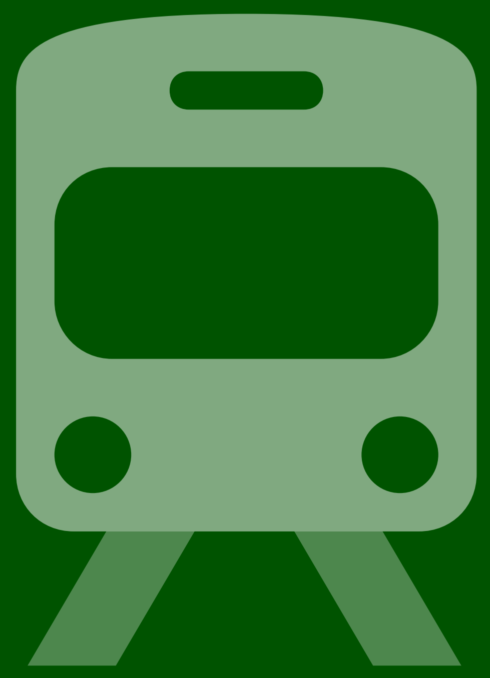
German overnight visitors who arrange their stay in the Netherlands in advance (but not as part of a package holiday) mainly book their stay directly with the accommodation provider (50%). This is followed by booking via a booking website (37%).

2.8

Mode of transport

The majority of visitors from Germany travel to the Netherlands by car (68%); 14% travel by train and 8% by plane.

During their stay in the Netherlands, Germans mainly travel on foot (29%), by bike (23%), by public transport (17%), or by car/rental car (13%). The percentage of German visitors who walk and cycle while in the Netherlands is higher than the average for the 11 countries.

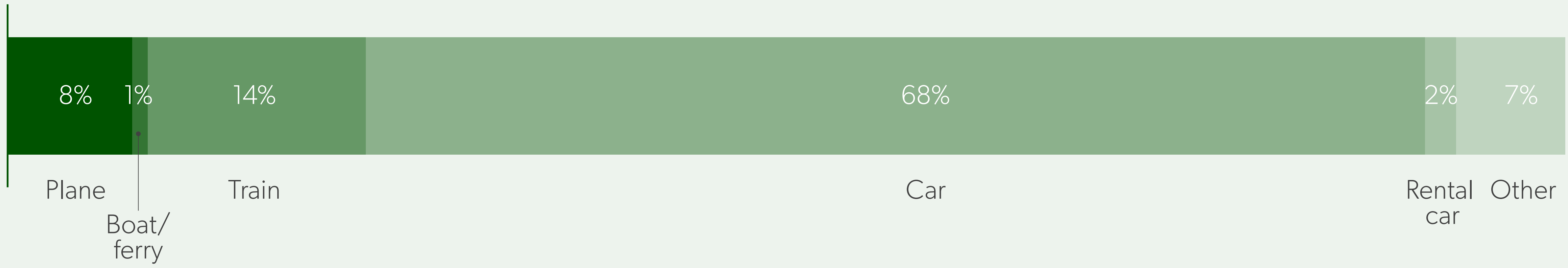


14%

of the visitors from Germany **travel to the Netherlands by train**

MEANS OF TRANSPORT USED
TO VISIT THE NETHERLANDS

SOURCE: NBTC, INBOUND TOURISM RESEARCH 2022.



2.9
Travel companions

© SABRINA GAUDIO

NUMBER OF PERSONS ACCOMPANYING
VISITORS FROM GERMANY

SOURCE: NBTC, INBOUND TOURISM RESEARCH 2022.

Visitors to the Netherlands often travel in groups of two. The same applies to German visitors; 43% travel in a group of two, 31% travel in a group of three or four, and 16% travel alone. In general, 33% of all business visitors to the Netherlands travel alone.

Among Germans who visited the Netherlands with a travel companion (i.e. not alone), 68% travelled with their partner, 24% with friends, 39% with a child/children, 8% with parents, and 12% stated 'other'. 'Other' refers to a cluster of other family members, colleagues, fellow club members, etc. For this question on travel companions, respondents could select more than one answer, e.g. both partner and child/children.

2.10

Type of accommodation

In general, visitors stay at one accommodation during their visit to the Netherlands. This also applies to German visitors: 86% stay at one accommodation, 9% stay at two, and the remainder in three or more.

In terms of the type of accommodation, Germans are more likely to choose a hotel/guesthouse (48%), followed by an apartment, or the home of friends/family/acquaintances (both 8%).

86%

stay in one accommodation in 2022

2.11

Main activities undertaken in the Netherlands

Top 5 most undertaken activities per country of origin

	Germany	Belgium	France	United Kingdom	United States
1	Going out for lunch/dinner (39%)	City walk 44%	City walk 53%	City walk (43%)	Shopping 42%
2	Cycling (36%)	Sitting on a terrace 35%	Shopping 43%	Shopping (35%)	City walk 39%
3	City walk (34%)	Shopping 33%	Visiting a town and/or village 41%	Going out for lunch/dinner (34%)	Visiting a city park 36%
4	Visit beach/ dunes (29%)	Going out for lunch/dinner 31%	Going out for lunch/dinner 38%	Walking in nature (30%)	Walking in nature 36%
5	Walking in nature (29%)	Visiting a town and/or village 31%	Cycling 38%	Visiting a city park (29%)	Going out for lunch/dinner 33%

SOURCE: NBTC, INBOUND TOURISM RESEARCH 2022.

Generally speaking, the three most popular activities during a visit to the Netherlands are walking around the city, eating out, and shopping. The table on the left presents the top five activities for the five major countries of origin for visitors to the Netherlands.

For German visitors, eating out is the most popular activity (39%), followed by cycling (36%) and going for a city walk (34%). During their stay in the Netherlands, German visitors are more likely to go cycling than visitors from Belgium, the UK, and the USA. Furthermore, going to the beach or the dunes only appears in the top five of German visitors.

2.12
Spending

Overnight visitors from the 11 countries surveyed for the Inbound Tourism Research report (2022) spent a total of more than €7.7 billion during their visit to the Netherlands. Of this amount, the largest share (25% or €1.9 billion) was spent on hospitality (food and drink). Accommodation came in second at €1.8 billion, followed by transport to the Netherlands (€1.6 billion). Taken together, these three categories account for two thirds of all expenditure. Visitors also spent money on items such as entrance tickets, shopping, and transport within the Netherlands.

German overnight visitors accounted for 42% of the €7.7 billion mentioned above. This can be explained by the fact that the vast majority of foreign overnight visitors to the Netherlands are from Germany.

Spending can also be broken down by reason for travel. Across all countries surveyed, business travellers generally spend the most (€760 per person per stay in the Netherlands). This is followed by holiday/leisure travellers (€650) and those visiting friends, family, or acquaintances (€525). In terms of business travellers, there is a significant difference between the expenditure of an individual business traveller (€633) and a MICE business traveller (€1,131).

€ 7.7 billion

was spent in 2022 by overnight visitors from the 11 countries

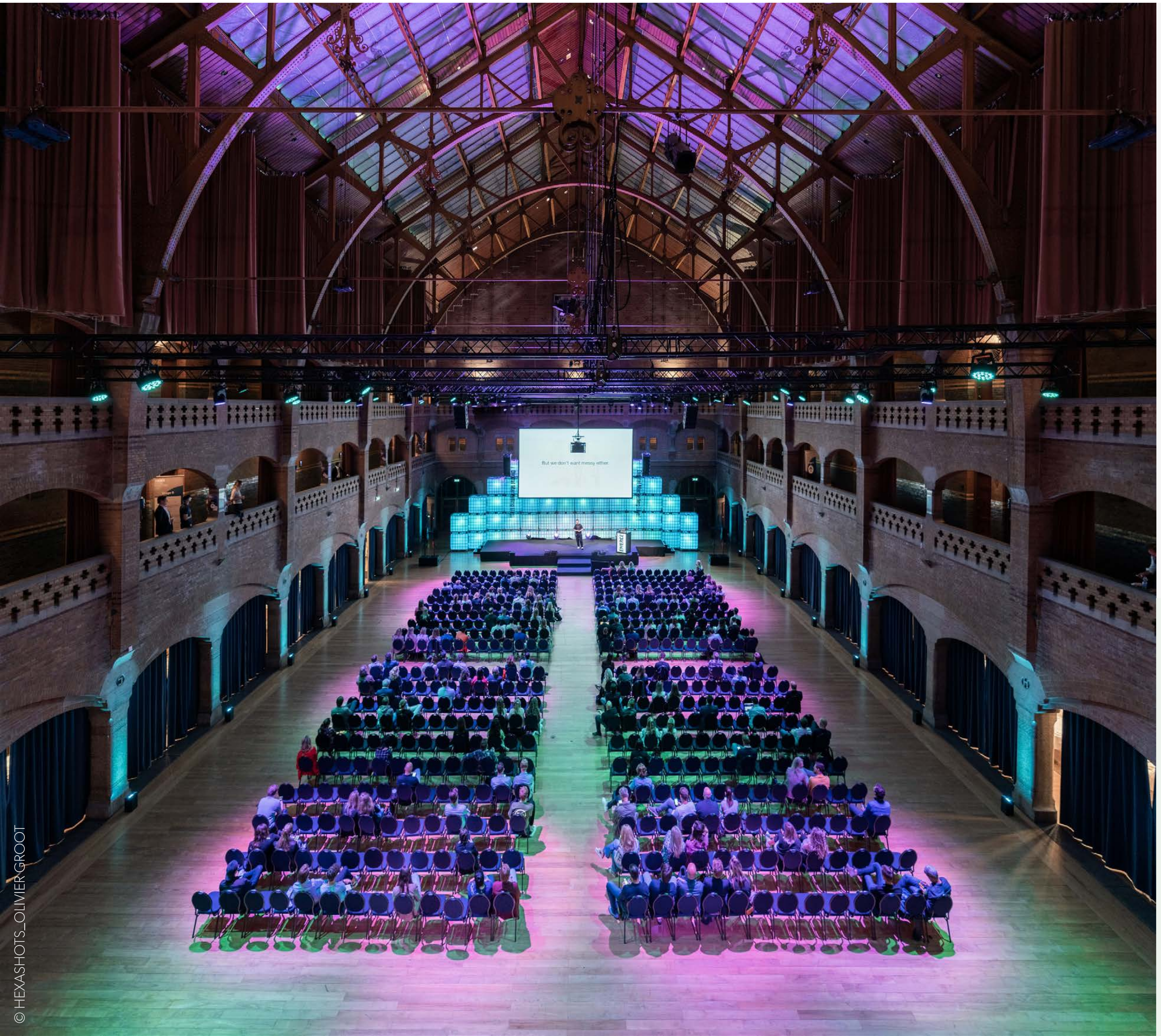
Spending per person per stay (including transport to the Netherlands)

Germany	€617
Belgium	€429
UK	€715
France	€657
USA	€1,425
Italy/Spain	€835
Austria/Poland	€820
Denmark/Sweden	€870

SOURCE: NBTC, INBOUND TOURISM RESEARCH 2022.

2.13

Business visits

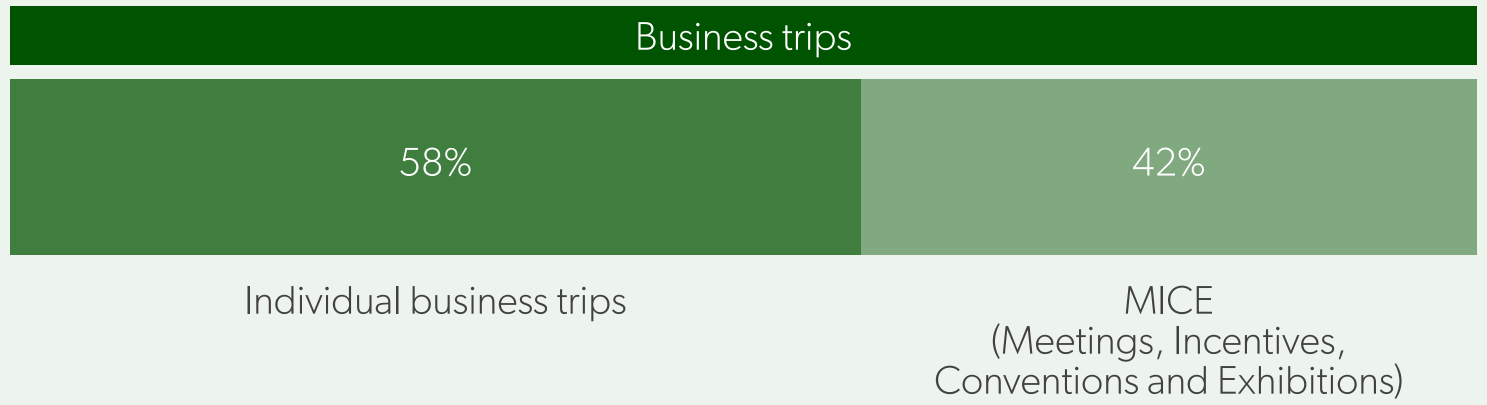


Within the category of business visits to the Netherlands, we distinguish between individual and organised business trips. In the case of an organised business trip, visitors come to the Netherlands for a business meeting, an incentive, a conference or a trade fair/exhibition. This type of business visit is often referred to by the collective term MICE (Meetings, Incentives, Conventions and Exhibitions).

Travellers who come to the Netherlands for another business reason fall into the category of 'individual business trip', such as those carrying out work, attending a training course or visiting their head office. Of the business visitors questioned, 42% came to the Netherlands for MICE.

TYPE OF BUSINESS TRIP

SOURCE: NBTC, INBOUND TOURISM RESEARCH 2022.



Business visits

© HEYASHLEY/OLIVIER GROOT

Of the 11 countries surveyed, Germany, Belgium, the United Kingdom, and the United States are the main countries of origin of business visitors. Business visitors from Germany are the least likely to travel to the Netherlands for MICE reasons (33%).

The main types of accommodation used for business trips are hotels, guesthouses, and bed and breakfasts. One in five business travellers stay in other types of accommodation, such as an apartment or a holiday bungalow park. When travelling for business purposes, accommodation is rarely rented from a private individual (for example via Airbnb).

Three-quarters of those surveyed who were travelling for business purposes said they had extended the duration of their business trip for holiday or leisure (bleisure). In about half of these cases, the respondents said that the leisure component preceded the business visit, and a similar proportion said that the leisure component followed the business visit. A small proportion (6%) extend their visit both before and after their business meeting. Bleisure trips are particularly popular with business travellers from the United States, with 87% extending their trip.

Within the MICE segment, visitors are even more likely to extend their trip for holiday or leisure purposes compared to individual business trips. In the MICE segment, an extension to a trip is more likely to take place after the business component rather than before.

Chapter 3

Image of the Netherlands

As part of the national tourism vision 'Perspective 2030', much effort is being put into the sustainable development of the Netherlands as a tourist and business destination. A strong international position is therefore very important, as it attracts investment, talent, students and visitors. The image of the Netherlands plays a vital role in achieving and maintaining a strong international position.

© JAN BIJL

3.1

Familiarity and overall image

In 2023, NBTC conducted a survey that provides insight into the image of the Netherlands. The fieldwork took place in January/February via an online questionnaire. One thousand people from each of the following countries participated in the survey: the Netherlands, Belgium, Germany, France, the United Kingdom and the United States. A benchmark study was also carried out, making it possible to compare the image of the Netherlands with our main benchmark countries, Belgium, Germany, France, the United Kingdom and Denmark.

In this chapter, you will find some of the key results from this survey.

47% of Germans know the Netherlands well or pretty well, 34% know a little bit about the country, 14% know it only by name, and 5% know nothing about it at all. The proportion of Germans who know the Netherlands well or pretty well is comparable to the proportion who know France well or pretty well (42%). By contrast, the Germans are less familiar with Belgium (34%) and Denmark (27%).
In terms of spontaneous associations, when asked about the Netherlands, Germans often mention tulips, Amsterdam, cheese, and the sea. The word cloud below shows which words were mentioned most often. The bigger the word in the word cloud, the more often it was mentioned.

In addition, 88% of Germans surveyed have a (very) positive opinion of the overall image of the Netherlands.

FAMILIARITY OF GERMANS
WITH THE NETHERLANDS

SOURCE: NBTC.

3.2

Image on various topics

When asked about spontaneous associations with **residents of the Netherlands**, Germans most frequently mentioned nice, friendly, helpful and open. From a list of several options, respondents also chose welcoming, open-minded and tolerant as the best descriptions of residents of the Netherlands.

When Germans think of **Dutch cultural heritage and historic buildings**, the Anne Frank House, windmills, and Amsterdam most often come to mind. In addition, more than two-thirds of Germans (strongly) agree that the Netherlands has a wide range of (art/historical) museums (67%) and historical monuments and buildings (68%).

In comparison, Germans are less likely to agree with these statements than, for example, the British (79% and 78% respectively).

When Germans think of **contemporary cultural activities in the Netherlands**, they often think of museums, castles, cycling, and art. In addition, 60% (strongly) agree that the Netherlands has a wide range of modern art museums.

When it comes to **nature in and the landscape of the Netherlands**, Germans mainly mention the sea, the beach, tulips, and greenery. A total of 80% agree that the Netherlands has a water-rich landscape, full of lakes, ponds, rivers, and dikes.

Germans tend to associate **a dynamic city** with lots of people, shops, culture, and modern buildings. When asked about the Netherlands, Germans consider Amsterdam to be the most dynamic city, followed by Rotterdam and The Hague.

In terms of **offerings for tourists**, Germans see the Netherlands as a country with many opportunities for cycling (81% agree), many historic city centres (77%), and good shopping opportunities (74%).

Chapter 4

Glocalities segmentation model

The Glocalities model, introduced by Motivaction in 2014, is an international segmentation model based on values, lifestyle, psychology, and trends. NBTC uses this segmentation to distinguish between international visitors. The model has five different segments: Creatives, Challengers, Achievers, Conservatives and Socializers. It is used to understand the drivers behind the behaviour of a target group, making it possible to identify and target a specific group that matches a destination's core values.

4.1
Glocalities segments

Each of the five Glocalities segments has its own set of norms and values and represents a particular way of life. Below is a brief description of the segments:

Creatives
Open-minded idealists who adhere to self-development and culture.

Challengers
Competitive careerists, fascinated by money, risk, and adventure.

Achievers
Entrepreneurial networkers who focus on family and community life.

Conservatives
Family-oriented people who value traditions, etiquette, and an organised life.

Socializers
Sociability seekers who love entertainment, freedom, and family values.

In the population of Germany, Socializers and Creatives have the largest share (both 32%), followed by Challengers (19%), Conservatives (10%) and Achievers (7%).

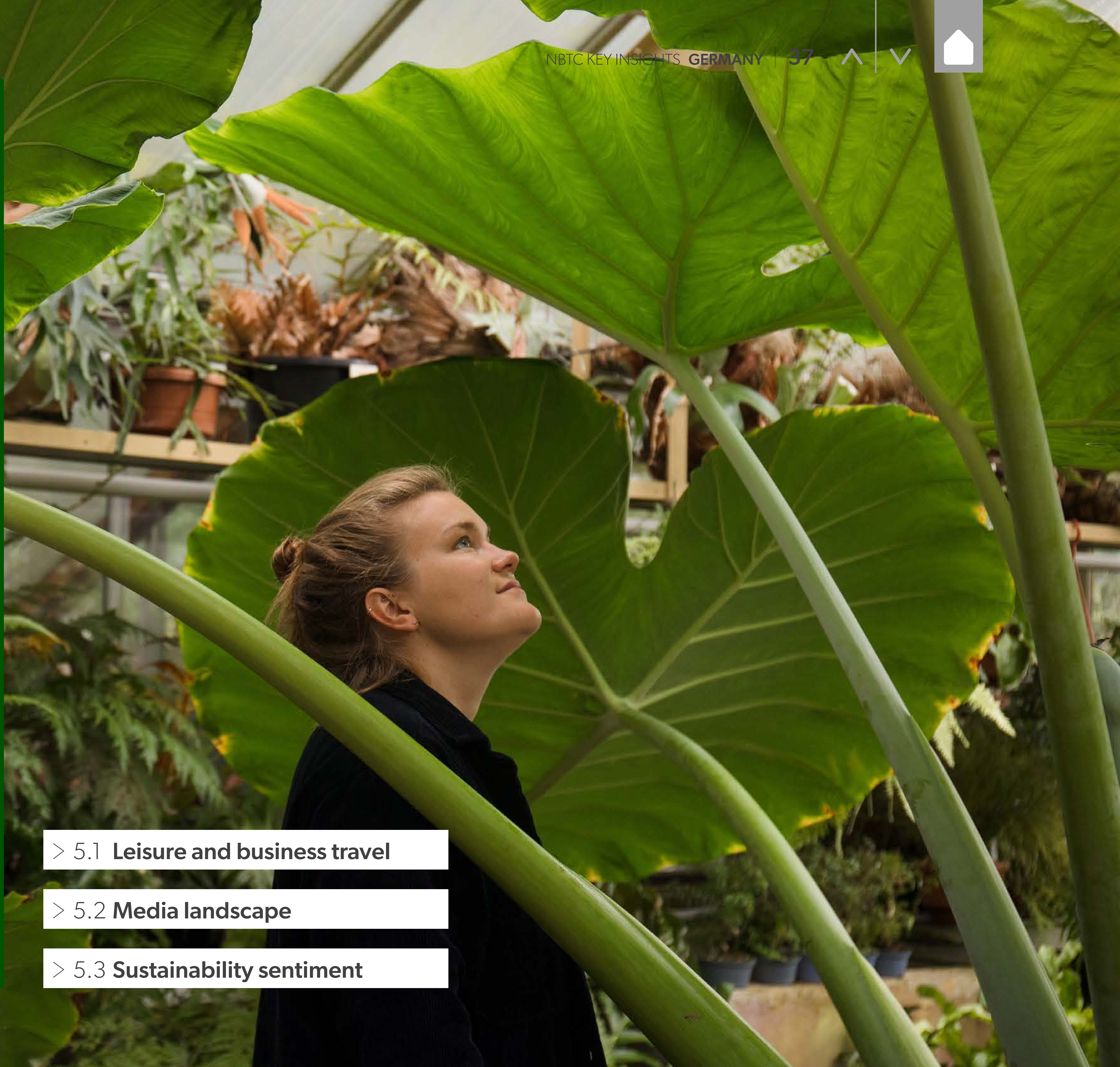
NBTC created visitor profiles based on these segments. All profiles (personas) can be downloaded (at the moment in Dutch only) at NBTC's website.

©ANP

Chapter 5

Trends & developments

This chapter explores developments in the German market and how emerging trends are affecting the travel and tourism sector. From artificial intelligence and sustainable mindsets to new ways of working and changes in media consumption, Germany is constantly evolving.



5.1
Leisure and business travel

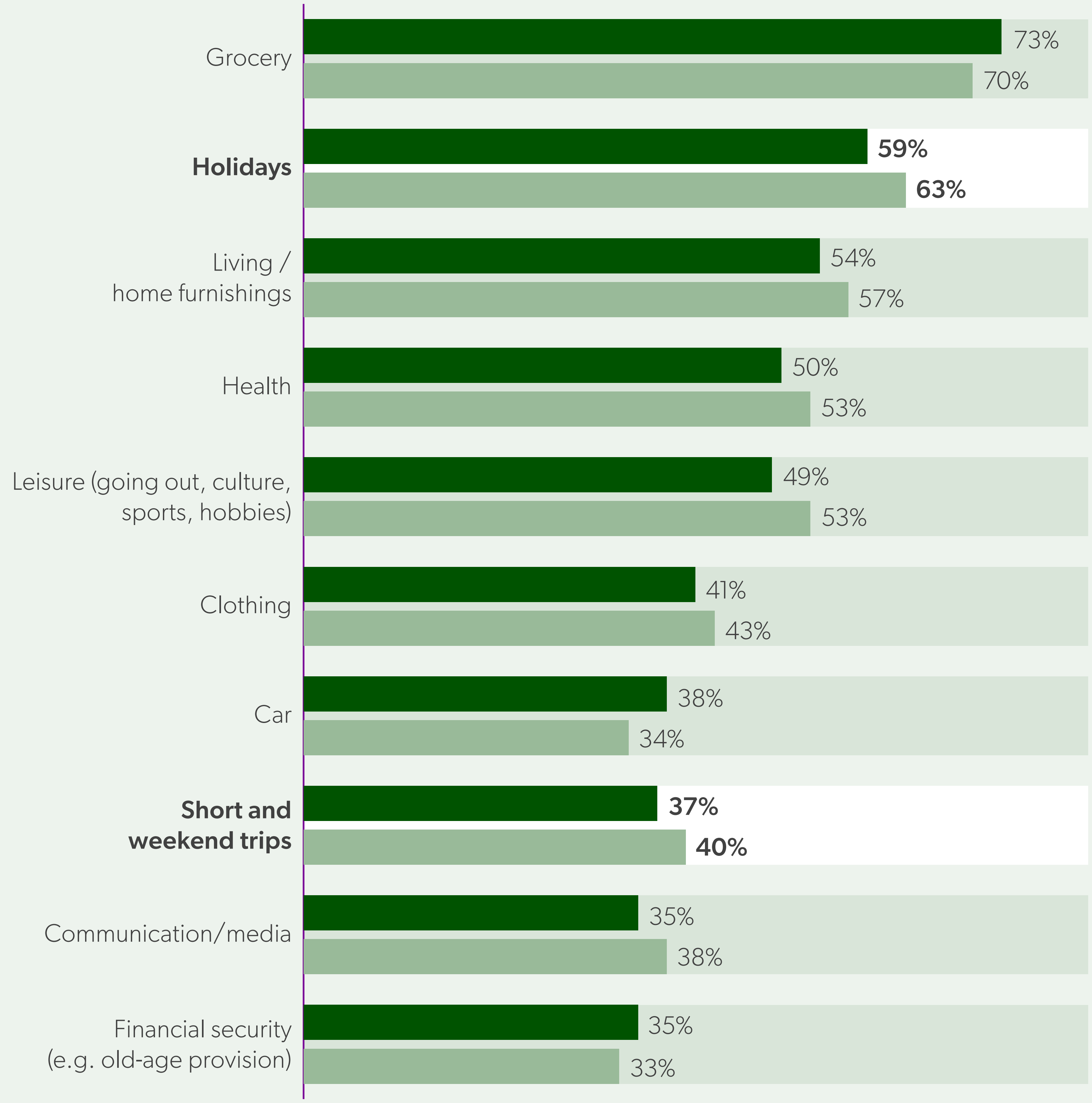
Leisure travel
Despite several crises (health, war, financial), holidays and short trips continue to be very important to the German population. In November 2022, holidays ranked second after grocery shopping.

© OLIVIER GROOT

CONSUMPTION PRIORITIES
OF TRAVELLERS

SOURCE: REISEANALYSE ONLINE 11/2022 AND PREVIOUS SURVEYS, FORSCHUNGS-GEMEINSCHAFT URLAUB UND REISEN (FUR).

BASIS: TRAVELLERS (HOLIDAY TRIP OR SHORT HOLIDAY TRIP IN THE LAST 12 MONTHS) IN THE GERMAN-SPEAKING POPULATION, BETWEEN THE AGES OF 14 AND 75.



Nov 2022
Nov 2020

Leisure and business travel

€26.9 billion

spent on business travel in 2022

© OLIVIER GROOT

Business travel

However, business travel is a different story. Since the COVID-19 pandemic, German companies are significantly less likely to travel for business. According to the latest VDR business travel analysis, they spent only €26.9 billion on business travel in 2022, which is half of the amount spent in 2019 (around €55 billion). To reduce travel costs, companies are choosing to decrease the number of business trips. However, when they do go on a business trip, the trips are extended by combining several things in order to maximize value. Although sustainability reporting is becoming increasingly important, it is still not an issue for 29% of companies with more than 500 employees. However, they are increasingly considering whether a business trip is absolutely necessary. Reducing business travel has therefore already become, or is set to become, the preferred climate-friendly measure for almost all companies (90%).

SOURCE: VDR-GESCHÄFTSREISe-ANALYSE: UNTERNEHMEN SPAREN MASSIV BEI GESCHÄFTSREISEN (FVW.DE).

Workation

Working from home has been part and parcel of everyday working life in Germany since the COVID-19 pandemic. According to the 2023 ADAC Tourism Study, the concept of workation – i.e., working at a holiday resort instead of at the employer's location or at home - also has potential. Looking at the group of professionals for whom workation would be feasible, two-thirds are interested in the idea. Almost one in ten in this group has already made use of this option or has a firm commitment from their employer to do so.

According to the results of the study, workation has the potential to become a trend in Germany, which may not appeal to the masses, but could help to make an employer more attractive.

SOURCE: ADAC TOURISMUSSTUDIE: REISEVERHALTEN DER DEUTSCHEN | ADAC.

Leisure and business travel

Digitalisation

Digitalisation is currently posing major challenges to the tourism industry in Germany. It is the leading trend and yet many tourism companies have neither the financial resources nor the right people to make the necessary changes.

Fynax has examined the most important trends in e-commerce in Germany in 2023. Buy now, pay later, gamification, and the use of artificial intelligence (AI) are three of those trends.

AI

The latest developments in the industry paint a relatively clear picture: artificial intelligence is likely to play a major role in e-commerce. This is particularly true for supply chain and logistics automation, where AI technologies can help to make processes more efficient, reduce costs, and improve supply chain security through machine learning, data analytics, and robotics.

BNPL

The ‘buy now, pay later’ payment model is becoming increasingly popular in Germany. Providers such as Klarna, PayPal, Affirm, and Afterpay are just a few examples that are particularly popular with German users. The flexible payment model allows consumers to pay for their online purchases in instalments instead of paying the full amount straight away. The attraction is that customers can often use this flexible payment method without incurring additional interest or fees. The model is becoming increasingly popular not only with consumers but also with online merchants themselves. Integrating BNPL functionality into an online store can help to increase conversion rates and significantly boost sales.

Leisure and business travel

Gamification

Many German companies use gamified elements to engage customers on their platform, encourage interaction, and ultimately increase sales. Companies such as Deutsche Bahn, Volkswagen, and Lufthansa use gamified elements on their websites in the form of points systems, rewards, rankings, challenges, badges, and virtual currencies. These elements are designed to help motivate customers to spend more time on the website, to shop more often, and to achieve certain defined goals. Companies are also using gamification to build brand loyalty by offering users a fun and interactive shopping experience.

Examples of companies in Germany that have already successfully integrated gamification:

- **Deutsche Bahn:** The Deutsche Bahn app, DB Navigator, uses gamification elements such as points, leaderboards, and rewards to encourage customers to use public transport.
- **Volkswagen:** Volkswagen has the Think Blue. Challenge app, where drivers can earn points by driving in an environmentally friendly way. These points can then be redeemed for various rewards.
- **Lufthansa:** Lufthansa has a frequent flyer programme, Miles & More, in which customers can achieve different status levels by collecting air miles. These levels offer various benefits and rewards to encourage brand loyalty.

SOURCE: TRENDS ARCHIVES - FYNAX.

Leisure and business travel

© ROBIN UTRECHT

78%
of the German people **cycle occasionally or regularly**

To conclude this sub-section, we present several trends that could open up opportunities for the Netherlands with regard to German visitors.

1. Cycling
Studies conducted by the ADFC (2019, 2020) show that 78% of Germans cycle occasionally or regularly. During the pandemic, almost 50% of people cycled more often and for longer distances. In 2019, 5.4 million people travelled by bicycle. Since the outbreak of the pandemic in particular, interest has been on the rise, with 1.8 million people making their first bike trip in 2020. Read more about the German cyclist in this magazine.

NBTC also conducted a survey among foreign visitors who cycle in the Netherlands. This research was conducted among visitors from North Rhine-Westphalia and Lower Saxony (DE), Flanders (BE), and the United Kingdom. Some key findings from this research can be found in this infographic.

2. Short holidays
The 2030 Reiseanalyse Trend Study predicts that the total number of short breaks will increase from 92.1 million in 2019 to 100.4 million in 2030. This trend will be driven by the 14-18 age group (+30%) and the 60+ age group (+25%). This trend towards more short holidays could also have a positive impact on the Netherlands.

3. Travel motives remain constant
The underlying reasons for going on holiday are unlikely to change in the next decade: relaxation, unwinding, getting away from the daily grind, and recharging one's batteries will continue to be the driving forces behind holiday travel. Similarly, customers will continue to enjoy destinations that promise plenty of sun, warm weather, and beaches.

5.2

Media landscape

The media landscape in Germany is currently in a state of flux. Since the pandemic, mergers between large publishing houses and TV providers – and even other publishing houses – have dominated the headlines.

Despite the subsequent decline in the number of print titles, the media landscape remains broad and diverse.

Media outlets are also constantly adapting to user habits; young people read the newspaper almost exclusively online on their smartphones. Podcasts complement print products, influencers specialise in certain topics, and TV is not dead! You can find more information on the German media landscape on this page (in Dutch). You will also find information on how the NBTC team in Germany can help you if you have any questions about press, PR, or influencers.

Social media

The Digital 2023 report by Meltwater and wearesocial.com reviews the social media and digital trends of 2022. The research found that WhatsApp is the most used social media platform by German internet users aged 16 to 64 (82%), followed by Facebook (61%) and Instagram (57%). The main reasons given for using social media were to keep in touch with family and friends (46%), to read the news (38%), to fill free time (32%), to find content/videos (26%), and to find inspiration for things to do and buy (25%).

SOURCE: WEARESOCIAL AND MELTWATER.

WhatsApp

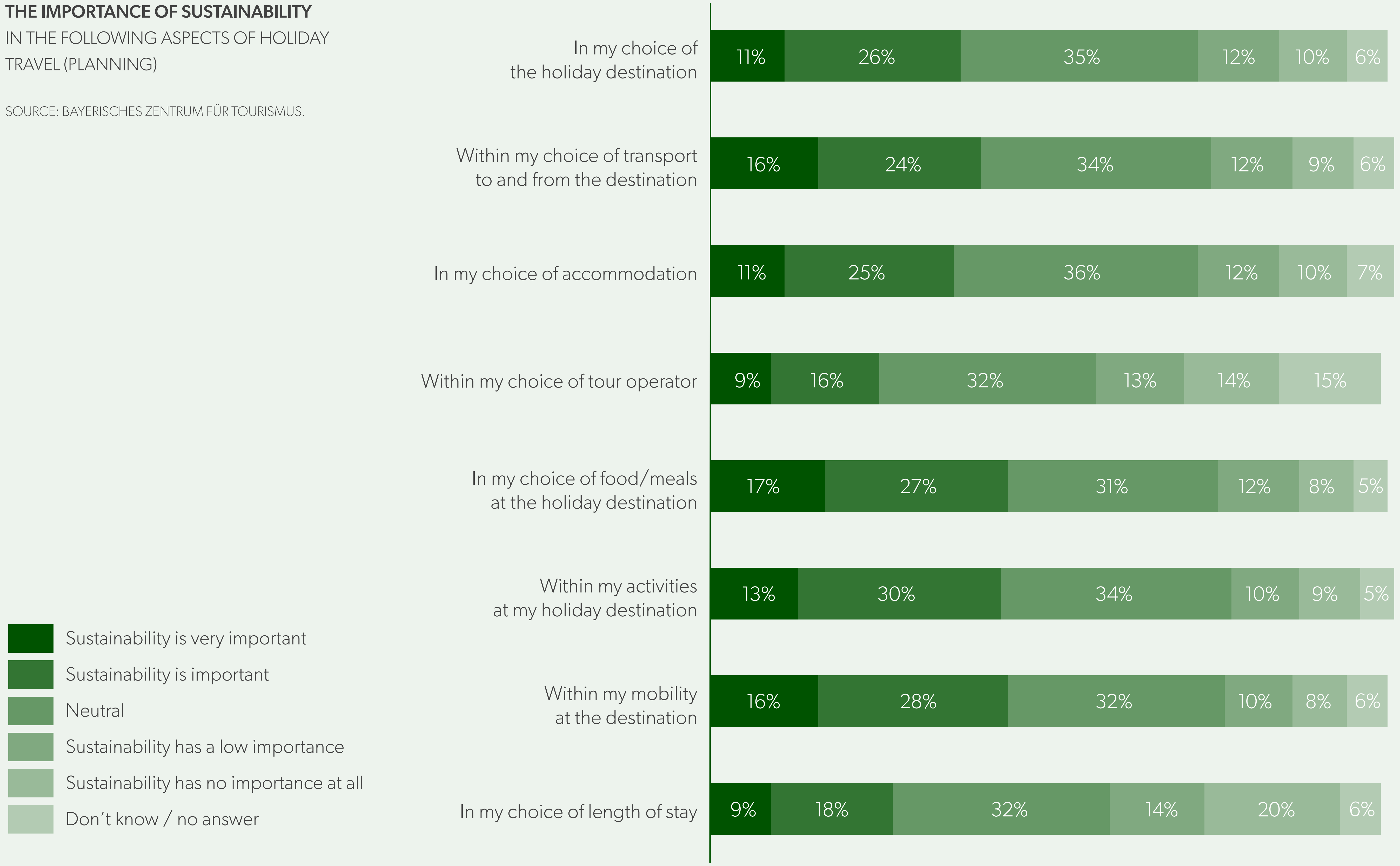
is the most used social media platform

5.3

Sustainability sentiment

THE IMPORTANCE OF SUSTAINABILITY
IN THE FOLLOWING ASPECTS OF HOLIDAY TRAVEL (PLANNING)

SOURCE: BAYERISCHES ZENTRUM FÜR TOURISMUS.



In September 2022, the Bavarian Centre for Tourism conducted a market research study in which 1,424 people aged between 18 and 74 took part. Around 37% of respondents said that sustainability was (very) important when choosing a holiday destination. This compares to 22% who said it was not or not very important. For respondents, mobility and catering at the holiday destination are the most important issues in terms of sustainability. By contrast, the choice of tour operator and the length of stay played a minor role in relation to sustainability.

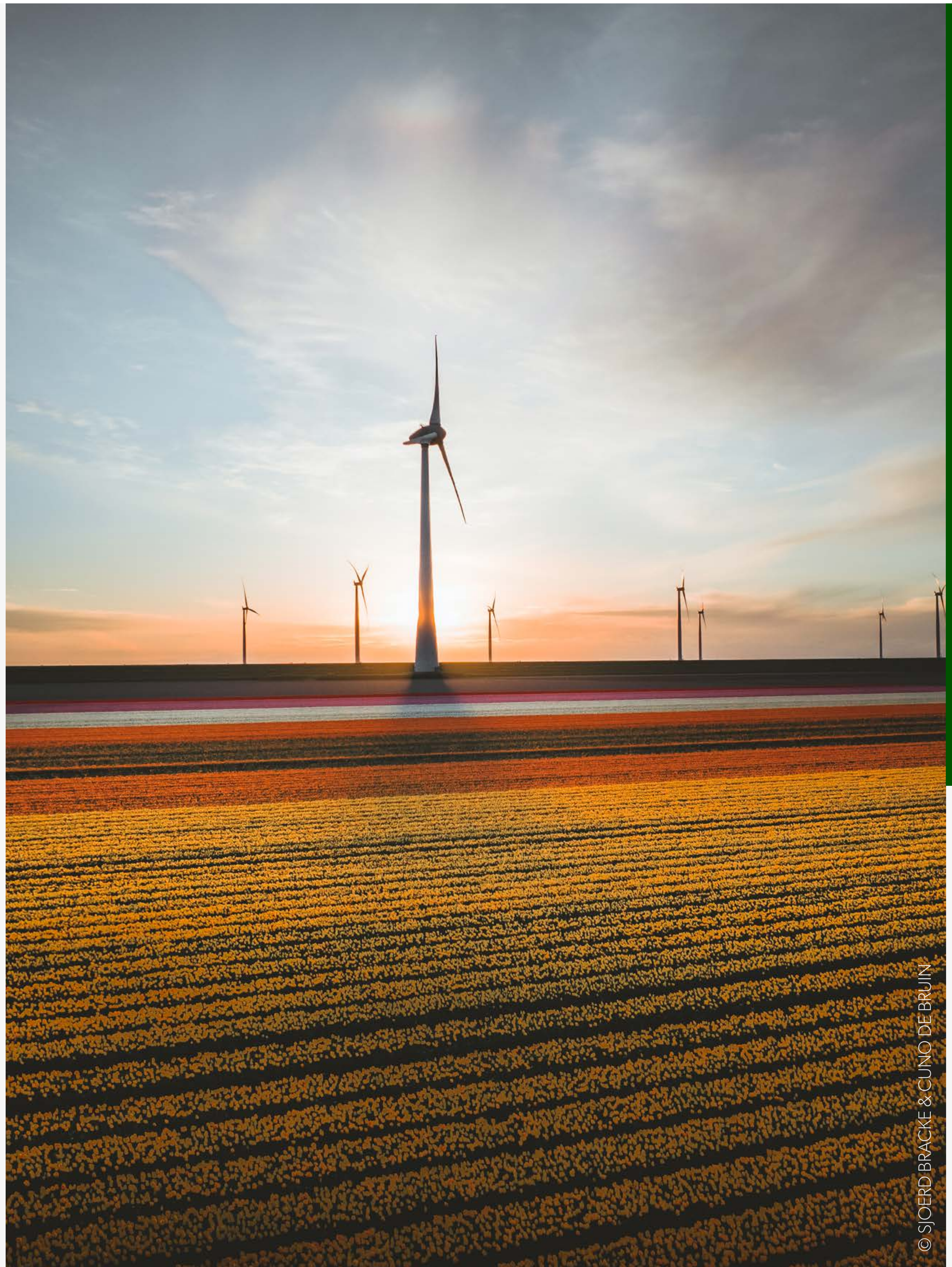
The survey also asked respondents where they go to get information about planning a holiday in a sustainable way. 70% of respondents said 'the internet', 28% said their accommodation, and only 18% went to a travel agent for information on this topic.

Sustainability sentiment

Another study conducted by IfD Allensbach in 2023 compared German camping holidaymakers with the 'German population' with regard to the topic of sustainability and holidays. It is striking that camping holidaymakers demonstrated significantly more sustainable attitudes across all questions. For example, 21.3% of camping holidaymakers surveyed said that sustainability considerations play a major role in their consumption decisions (compared to 14.4% of the overall population).

In June 2022, MyPostcard.com surveyed more than 1,300 people on the YouGov panel in Germany about their willingness to pay more for sustainable travel. Only 7% said that they already do so; a further 17% said they would be willing to pay more in the future, and 38% said they would not.

SOURCES: IFD ALLENSBACH STUDY, JUNE 2023; MYPOSTCARD.COM STUDY 2022 (UMFRAGE ZUM REISEVERHALTEN DER DEUTSCHEN 2022: FLEXIBILITÄT UND NACHHALTIGKEIT RÜCKEN IN DEN VORDERGRUND - MYPOSTCARD NEWSROOM); OVERALL (STATISTA: NACHHALTIGES REISEN | STATISTA)



© SJOERD BRACKE & CUNO DE BRUIJN

21.3%

of German camping holidaymakers surveyed said that **sustainability considerations play a major role in their consumption decisions**

NBTC's Holiday Sentiment Monitor also regularly asks about sentiment towards sustainability. More information about this monitor can be found here.

Chapter 6

SWOT-analysis

A SWOT analysis has been prepared based on trends and developments in Germany. It highlights the major strengths, weaknesses, opportunities and threats in relation to the Netherlands.

6.1

SWOT-analysis

strengths

- Proximity, short travel distance, and easily accessible by car and train.
- The Netherlands has **excellent cycling infrastructure.**
- **Friendly** atmosphere and people.
- The Netherlands has a reputation for being (child- and animal-) **friendly and hospitable**, also in terms of accommodation.
- **A wide range of activities for all ages:** coast, cities, green spaces, water, theme parks, etcetera.
- A long coastline with **a rich hinterland.**
- **Language** (many Dutch people speak German or English).
- The Netherlands is perceived as being **innovative and "green"** by young and old (culture and architecture).
- The Netherlands is perceived as being **safe and secure**, partly because of good medical care.

weaknesses

- The Netherlands is **perceived as being quite expensive** (hospitality, petrol/diesel, parking).
- **Traffic** (traffic jams, new speed limit, high fines).
- For a coastal destination, **the Netherlands does not have the best climate** (not a typical sun-sea-coast destination).
- **Lack of information in German** at attractions, museums, etcetera.
- **Opening hours for shopping** (shops close at 6 p.m.).
- **Value for money** in terms of food, drink, and shopping not as good as in Germany.
- **Image of coffee shops** and the Red Light District.

SWOT-analysis

opportunities

- Many **repeat visitors and increased spending** on short holidays;
- Growing interest in **camping/caravanning** (demand is up 30% more guests in 2023 compared to 2019).
- **Good geographical location** of the Netherlands in relation to densely populated areas (NRW).
- Holidays close to home are less affected by crises, making it an **ideal destination for last-minute decisions.**
- Growing market for **electric cars.**
- **Hiking and cycling/bike tours** (also by e-bike) are becoming more popular.
- **Climate change:** tourists are becoming less inclined to travel to warmer destinations in summer. The Netherlands as a slightly cooler destination is therefore a good alternative.
- **Potential for exchange programmes**, for example, for schools and associations (sport, horticulture, culture) from Germany to the Netherlands.

threats

- **Availability of affordable accommodation** during the summer holiday period.
- **Quality of accommodation** (especially on the Dutch coast).
- **Price/quality ratio** in the hospitality industry.
- **Overtourism** (crowds, tensions between locals and tourists during the summer months), which detracts from the friendly and charming nature of the Netherlands.
- **More day visits than overnight stays** because the Netherlands is so close by.
- Post-covid: **holidaying in one's own country** is also becoming more popular in Germany. Furthermore, destinations such as Spain, Turkey, and Greece are likely to increase their promotional activities in an attempt to win back visitors with lower prices/costs. This will increase competition.

Chapter 7

Cultural differences

This final chapter briefly discusses the cultural differences between the Netherlands and Germany. Want to do business with Germans? Then take advantage of the do's & don'ts on the next page.

7.1

Do's and don'ts in doing business with Germans

do's for doing business

→ **Punctuality is paramount.** This applies to both in-person and online meetings.
→ Wear **appropriate clothing** that provides sufficient coverage.
→ **Use the 'formal' you** ('Sie' in German) instead of the 'informal' you ('Du' in German).
→ **Be aware of titles** such as Professor and Doctor. Older people find it rude not to be addressed by their title, while younger people may not like it.
→ **Refreshments** during a meeting are very welcome; people expect more than just a biscuit.

don'ts for doing business

→ **Kissing and hugging** is only done between very close friends.
→ **Do not be imprecise;** this is not appreciated.
→ **Do not be too direct;** Germans are more reserved than the Dutch.
→ **Do not reschedule** appointments too often.

Contact & colophon

All texts, visuals and infographics in this publication may be reproduced or published, as long as it is provided with a reference. Although in the preparation of this publication we have attempted to be as thorough as possible, there is always the possibility that certain information is not entirely accurate, or may have become out of date. If known, the sources are listed.

NBTC
Netherlands Board of Tourism & Conventions
Prinses Catharina-Amaliastraat 5
2496 XD The Hague
T 070 3705 705

Postbus 63470
2502 JL The Hague

Tourist information
For tourist information, we refer you to our website holland.com or to one of the tourist offices in the Netherlands.

Media
Find our latest newsletters or follow us on X and LinkedIn.

nbtc.nl

Colophon

Text
Netherlands Board of Tourism & Conventions

Design
Studio Piraat, The Hague

Images
Mediabank Nederland
media.nbtc.nl
Cover photo
© The Hague & Partners

NBTC
Netherlands Board of Tourism & Conventions