

# NLroute Het landschap ontsloten

de internationale bezoeker

30 oktober 2015





De internationale vraag in kaart gebracht

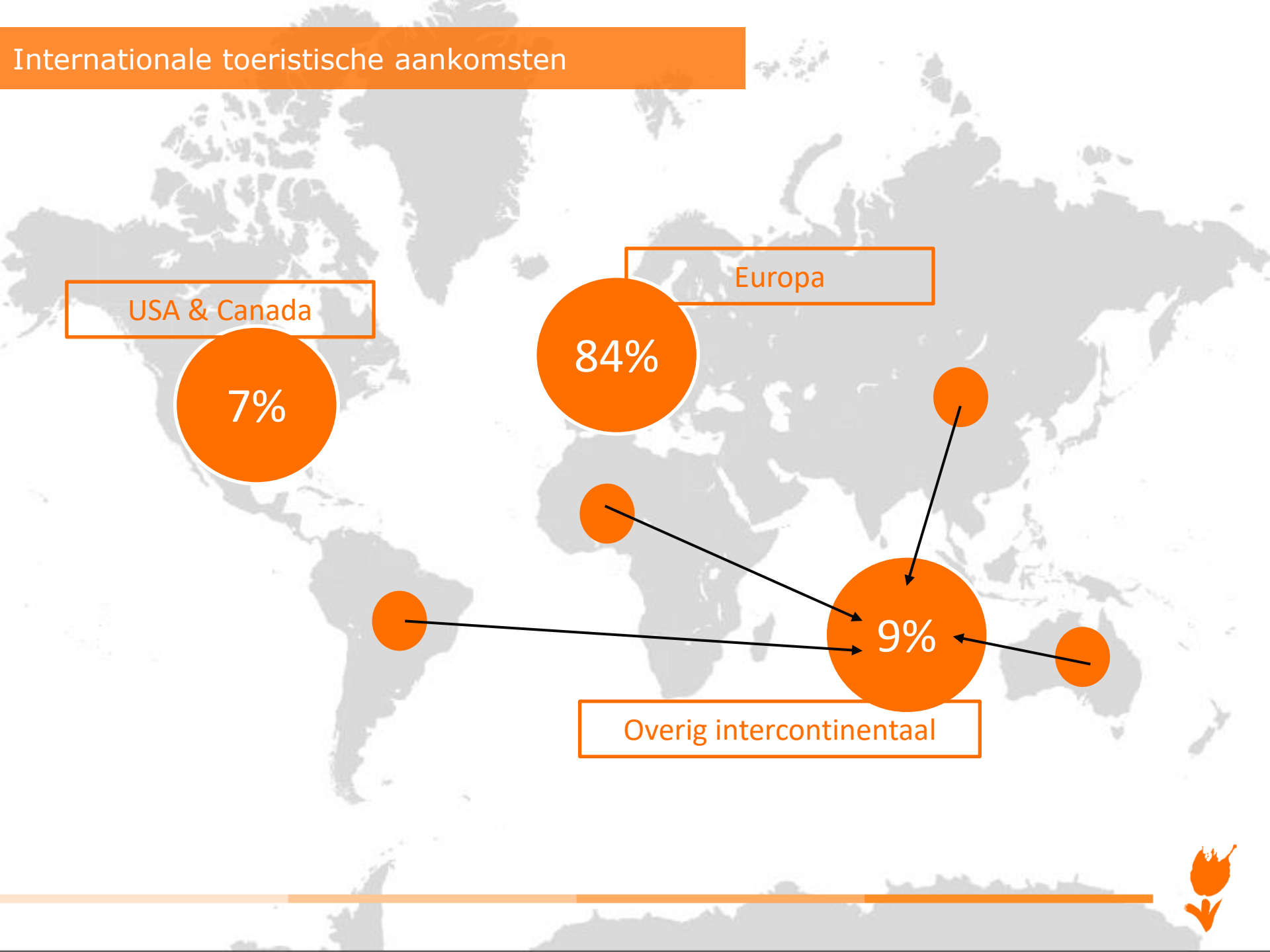


# Inkomend Toerisme 2012 - 2014

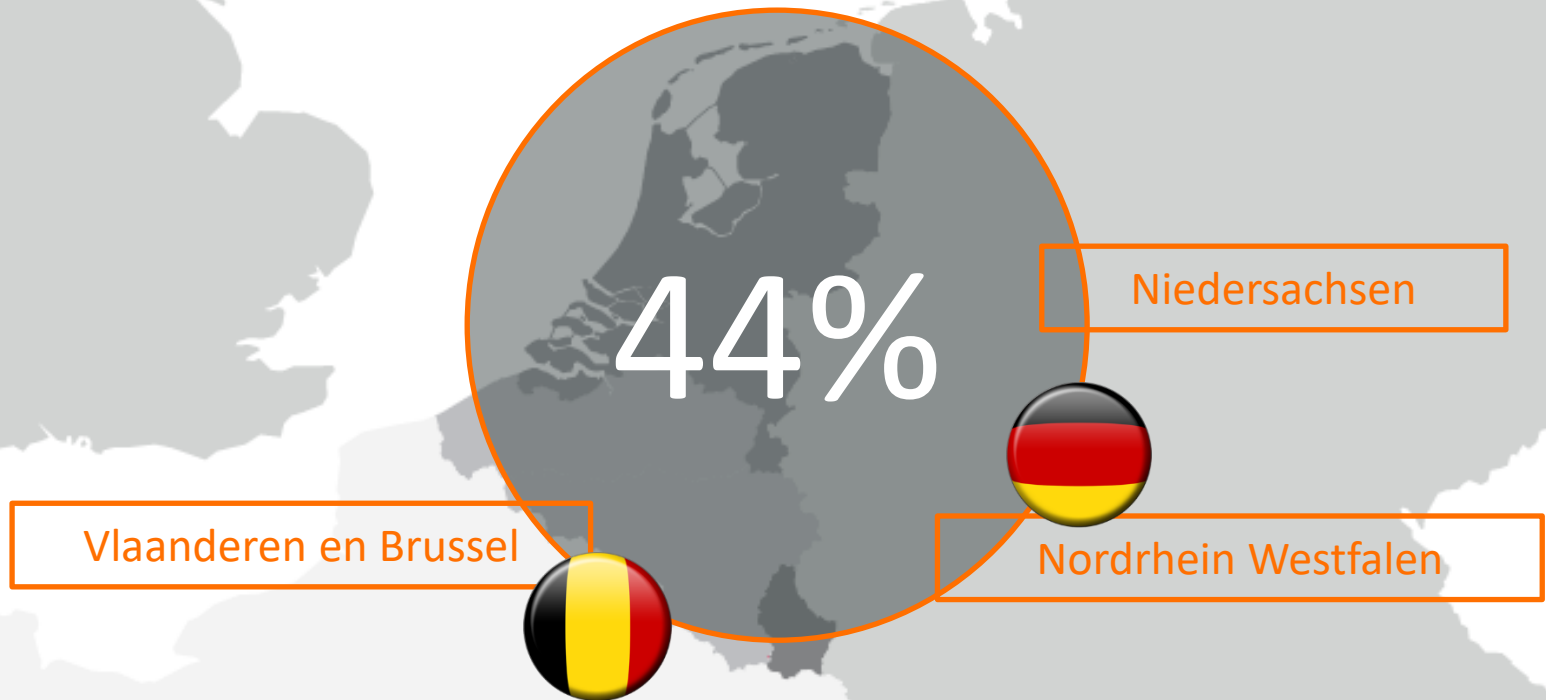
| INBOUND TOURISM 2012 - 2014 (IN ALL ACCOMMODATIONS) |                  |               |               |           |                  |               |               |           |
|-----------------------------------------------------|------------------|---------------|---------------|-----------|------------------|---------------|---------------|-----------|
|                                                     | Guests (x 1,000) |               |               |           | Nights (x 1,000) |               |               |           |
|                                                     | 2012             | 2013          | 2014          | +/-       | 2012             | 2013          | 2014          | +/-       |
| <i>Total Europe</i>                                 | 9.744            | 10.286        | 11.195        | 9%        | 25.112           | 27.214        | 29.421        | 8%        |
| Germany                                             | 3.209            | 3.495         | 3.894         | 11%       | 11.284           | 12.579        | 13.749        | 9%        |
| Belgium                                             | 1.537            | 1.673         | 1.828         | 9%        | 3.945            | 4.393         | 4.713         | 7%        |
| Great Britain                                       | 1.662            | 1.680         | 1.857         | 11%       | 3.217            | 3.257         | 3.675         | 13%       |
| France                                              | 666              | 680           | 725           | 7%        | 1.319            | 1.357         | 1.426         | 5%        |
| Switzerland                                         | 224              | 231           | 256           | 10%       | 464              | 488           | 543           | 11%       |
| Austria                                             | 82               | 89            | 97            | 10%       | 172              | 186           | 207           | 12%       |
| Italy                                               | 457              | 461           | 503           | 9%        | 935              | 955           | 1.033         | 8%        |
| Spain                                               | 427              | 395           | 396           | 0%        | 831              | 769           | 781           | 2%        |
| Denmark                                             | 141              | 144           | 141           | -2%       | 291              | 298           | 297           | 0%        |
| Sweden                                              | 143              | 142           | 142           | 0%        | 260              | 272           | 259           | -5%       |
| Norway                                              | 125              | 127           | 125           | -1%       | 247              | 260           | 250           | -4%       |
| Finland                                             | 67               | 67            | 63            | -5%       | 135              | 134           | 127           | -3%       |
| Russia                                              | 169              | 203           | 196           | -2%       | 362              | 442           | 418           | -3%       |
| Turkey                                              | 78               | 87            | 97            | 11%       | 156              | 177           | 194           | 10%       |
| Other Europe                                        | 756              | 812           | 875           | 8%        | 1.494            | 1.648         | 1.750         | 7%        |
| <i>Total Americas</i>                               | 1.382            | 1.337         | 1.431         | 7%        | 2.450            | 2.425         | 2.596         | 7%        |
| - USA                                               | 978              | 926           | 991           | 7%        | 1.667            | 1.612         | 1.743         | 9%        |
| - Canada                                            | 138              | 140           | 143           | 2%        | 262              | 272           | 270           | 0%        |
| - Brazil                                            | 116              | 119           | 139           | 17%       | 241              | 257           | 291           | 14%       |
| <i>Total Asia</i>                                   | 798              | 875           | 976           | 12%       | 1.443            | 1.574         | 1.782         | 13%       |
| - Japan                                             | 142              | 152           | 147           | -3%       | 242              | 257           | 253           | -2%       |
| - China (incl. Hong Kong)                           | 196              | 217           | 249           | 15%       | 314              | 354           | 404           | 14%       |
| - India                                             | 78               | 80            | 87            | 9%        | 144              | 147           | 165           | 13%       |
| - Indonesia                                         | 33               | 38            | 42            | 8%        | 65               | 72            | 77            | 7%        |
| - South Korea                                       | 28               | 39            | 45            | 13%       | 50               | 62            | 73            | 17%       |
| <i>Total Australia and Oceania</i>                  | 170              | 165           | 188           | 14%       | 339              | 329           | 368           | 12%       |
| <i>Total Africa</i>                                 | 114              | 121           | 135           | 12%       | 224              | 228           | 257           | 13%       |
| <b>Total</b>                                        | <b>12.205</b>    | <b>12.786</b> | <b>13.925</b> | <b>9%</b> | <b>29.570</b>    | <b>31.771</b> | <b>34.424</b> | <b>8%</b> |



# Internationale toeristische aankomsten



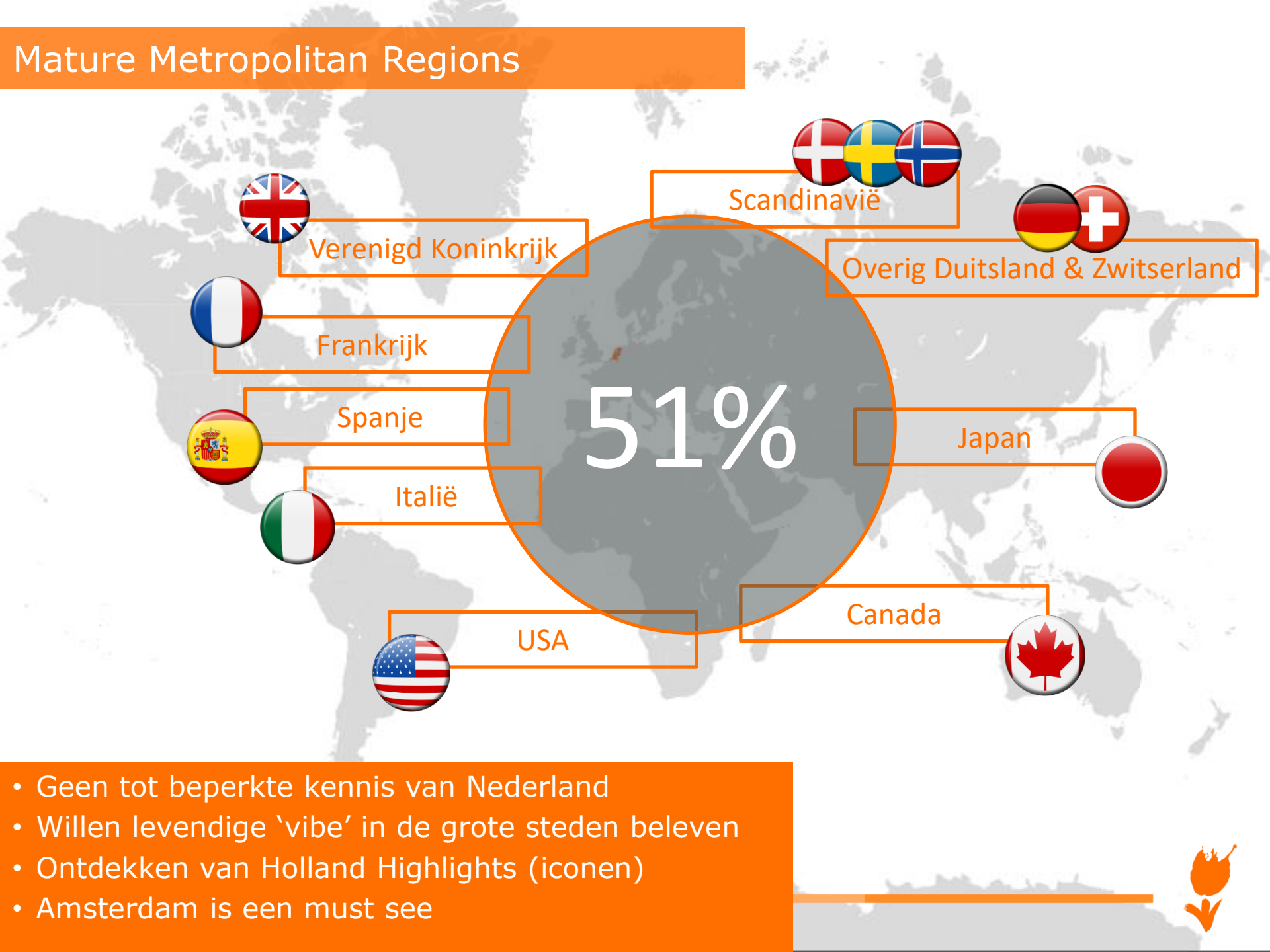
# Neighbouring Metropolitan Regions



- Kennis van ons land redelijk tot vrij goed
- Waardering voor kleinschaligheid en diversiteit
- Water als onderscheidend kenmerk
- Fietsen belangrijke activiteit
- Interesse in cultureel historisch erfgoed



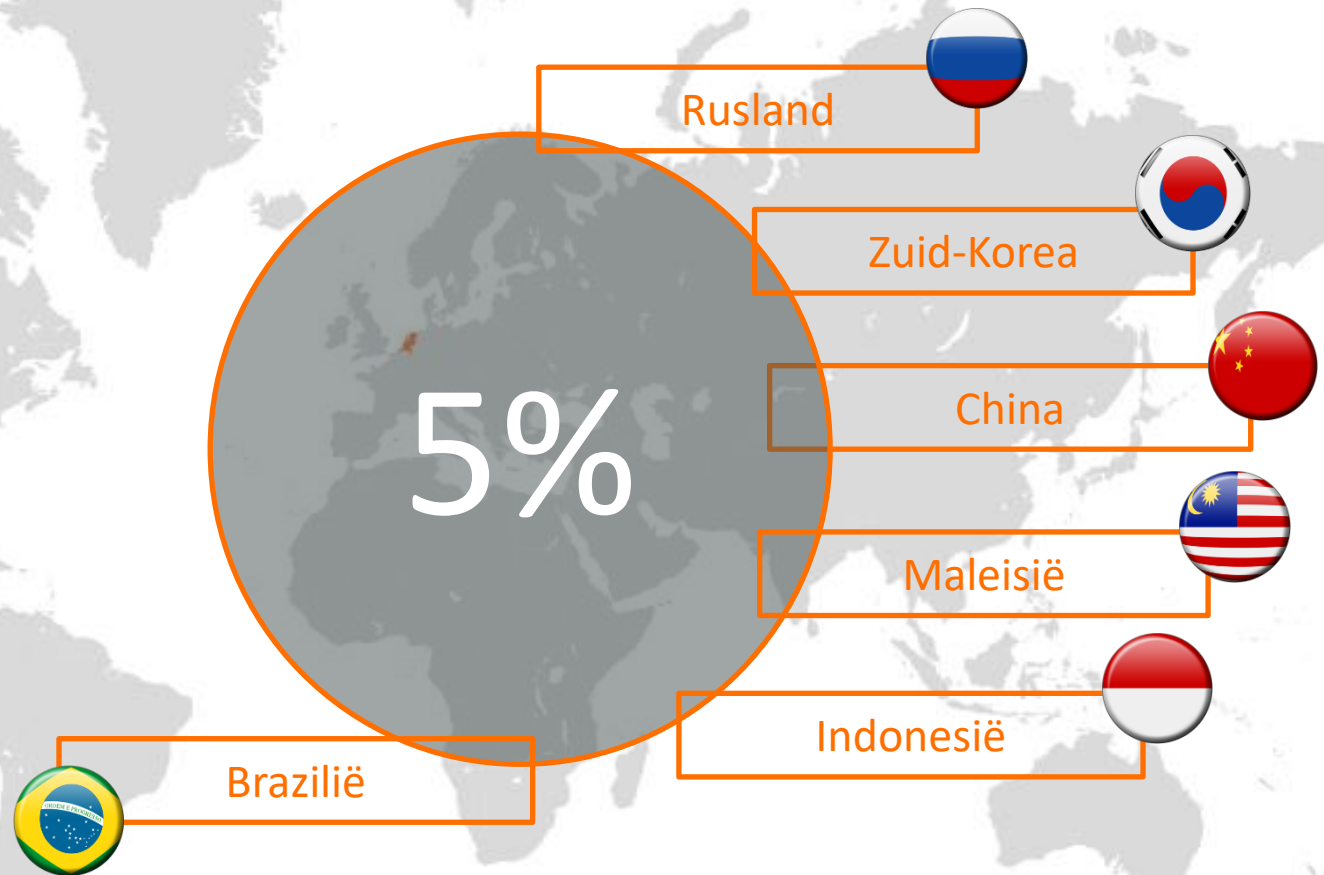
# Mature Metropolitan Regions



- Geen tot beperkte kennis van Nederland
- Willen levendige 'vibe' in de grote steden beleven
- Ontdekken van Holland Highlights (iconen)
- Amsterdam is een must see



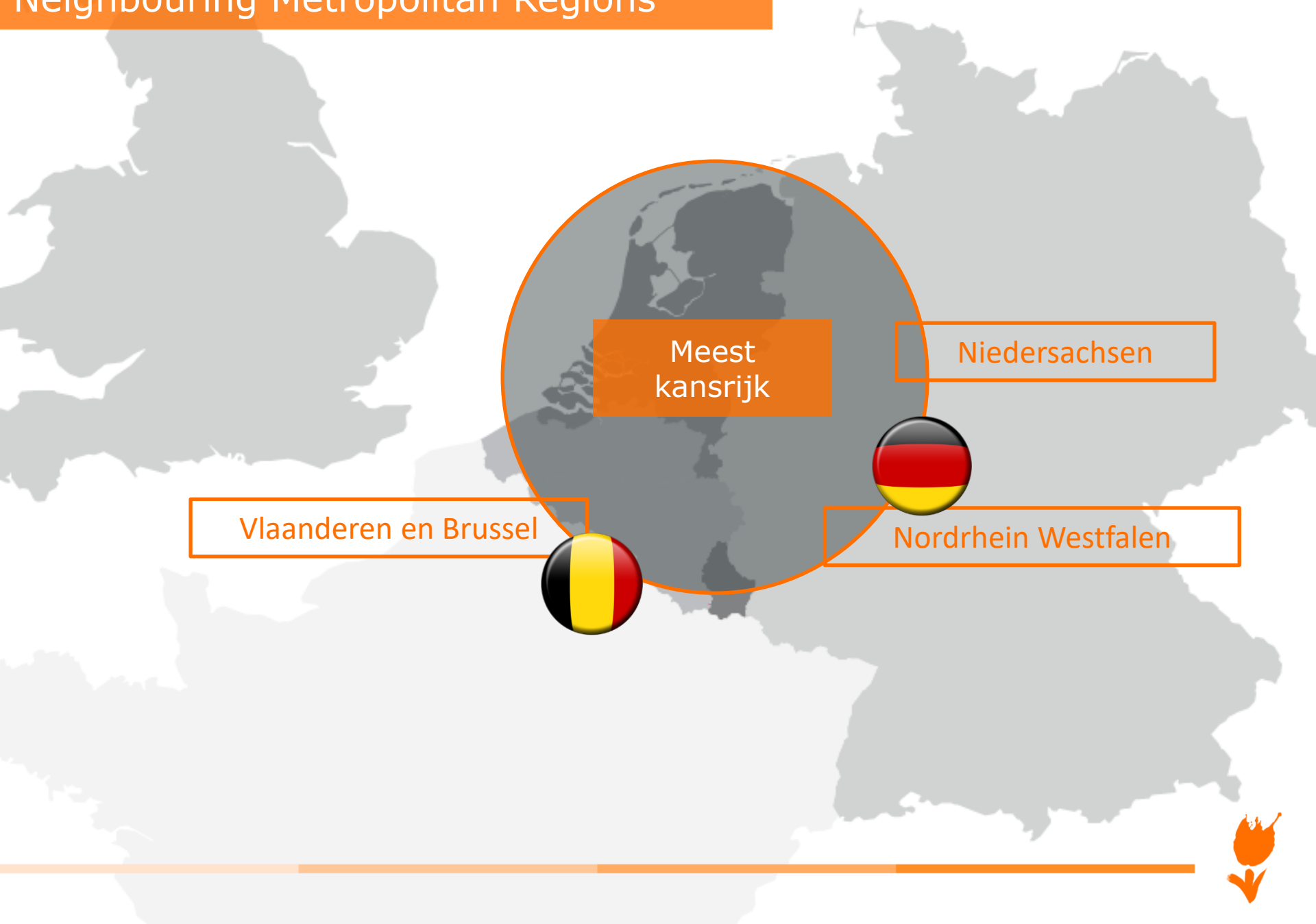
# Emerging Metropolitan Regions



- Nauwelijks kennis van Nederland
- Bezoek aan Nederland als onderdeel Europa reis
- Bezoeken 1 of meerdere highlights
- Shopping



# Neighbouring Metropolitan Regions



Meest  
kansrijk

Niedersachsen

Vlaanderen en Brussel

Nordrhein Westfalen





Lifestyle segmentatie





Lifestyle segment: Traditional

MARY



- Family-oriented
- Hold on to traditional norms and values
- Acceptation of authority and rules
- Value order, regularity and discipline
- Local orientation
- Avoids risks
- Lives soberly



FACTSHEET

COUNTRY

|                 |     |         |     |
|-----------------|-----|---------|-----|
| The Netherlands | 35% | UK      | 22% |
| Denmark         | 34% | USA     | 21% |
| Italy           | 27% | Belgium | 21% |
| Sweden          | 26% | Spain   | 21% |
| France          | 25% | Germany | 20% |

% of total population

|                      |                                                                                     |
|----------------------|-------------------------------------------------------------------------------------|
| Name:                | Mary                                                                                |
| Age:                 | 55                                                                                  |
| Place of birth:      | A village in the least densely populated area of the country                        |
| Civil state:         | Married (for 35 years, got married at 20)                                           |
| Place of residence:  | Medium-sized village                                                                |
| Children:            | Three children: aged 28, 30 and 32, the eldest two have young children of their own |
| Profession:          | Part-time nurse (2,5 days a week)                                                   |
| Hobbies & interests: | Gardening, cycling and painting                                                     |
| Education:           | Medium                                                                              |
| Income:              | Low-medium                                                                          |



MOOD



HOLIDAYS IN GENERAL

- Long holiday: 1,5 x per year (above average)
- Short holiday: 2x per year
- Top 2 Holiday type:
  1. City trip
  2. Beach holiday (below average)
- Top 2 Accommodation type:
  1. Middle-class hotel
  2. Holiday home/bungalow/villa (above average)

HOLIDAYS IN HOLLAND

- Average visits paid to Holland in the past 3 years
- Attractiveness of Holland for a short trip/holiday = 60% (below average)
- Visit intention to visit Holland in the next three years = 27% (below average)

HOBBIES AND FREE-TIME

- Hobbies: walking and cycling, gardening, puzzles.
- Free time: country-side/nature.
- Muscle: pop-classics.

MEDIA USAGE

- Magazines: stories drawn from real (everyday) life about ordinary people, and nature magazines.
- Newspapers: local news about my area and region.
- Smartphone/tablet: low tablet/smartphone usage.

WEEKLY MEDIA USAGE

- 14 hours • Low internet usage
- 3 hours • Low social media usage
- 18 hours • Watching television: local channels and national news once a day. Talk shows. Few international channels.
- 16 hours • Listen to the radio: classical music and golden oldies.





# Nlroute in Duitsland (NRW) en Vlaanderen

| Duitsland (NRW, NS)                                         | Vlaanderen                                                         |
|-------------------------------------------------------------|--------------------------------------------------------------------|
| Waterrijk landschap                                         | Fietsen                                                            |
| Fietsen                                                     | Cultureel erfgoed                                                  |
| Cultureel erfgoed                                           | Streekproducten en streekgerechten (culinair aanbod)               |
| Historische stadjes                                         | Historische stadjes                                                |
|                                                             | Waterrijk landschap                                                |
| Duitsers verblijven graag op of aan het water               | Inspelen op kleinschaligheid en gemoedelijkheid (het kleine geluk) |
| Verblijf op campings, vakantiewoningen en (kleinere) hotels | Verblijf in kwalitatief goede vakantiewoningen, hotels             |



# Nlroute in Duitsland (NRW) en Vlaanderen



- live like a local
- insider tips
- bezoeker in plaats van toerist
- laat zich verrassen
- open voor nieuwe belevingen



- Omgeving ontdekken
- Mensen ontmoeten
- Veel zien en doen
- Klein avontuur
- Plant graag vooruit





Andere initiatieven interessant voor  
NLroute



# HollandCity

- Spreiding in ruimte
- Verbinden van plekken middels passies



**B BLOEMENLIJN**  
Westland - Lisse - Aalsmeer - Zijpe - Noordoostpolder

**G GOUDEN EEUWLIJN**  
Middelburg - Veere - Dordrecht - Delft - Den Haag - Leiden - Lisse - Haarlem - Amsterdam - Zaanse Schans - Alkmaar - Hoorn - Enkhuizen

**H HANZESTEDENLIJN**  
Groningen - Hasselt - Kampen - Zwolle - Hattem - Elburg - Harderwijk - Deventer - Zutphen - Doesburg - Arnhem

**L LIBERATION ROUTE**  
Middelburg - Breda - 's-Hertogenbosch - Tiel - Nijmegen - Arnhem - Aalten - Holten - Elburg - Eindhoven - Roermond - Margraten

**M MONDRIAAN-DUTCH DESIGNLIJN**  
Eindhoven - Rotterdam - Den Haag - Leiden - Amsterdam - Utrecht - Amersfoort - Otterlo - Arnhem - Drachten

**S SHOPPINGLIJN**  
Schiphol - Amsterdam - Lelystad - Utrecht - Roosendaal - Roermond - Maastricht

**V VAN GOGHLIJN**  
Emmen - Amsterdam - Otterlo - Nuenen - 's-Hertogenbosch - Tilburg - Etten-Leur - Zundert

**W WATERLANDLIJN**  
Deltawerken - Dordrecht - Kinderdijk - Rotterdam - Haarlem - Amsterdam - Lelystad - Schokland - Giethoorn - Lemmer - Sneek - Afsluitdijk





# Nationale Parken Nieuwe Stijl







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