

# BENELUX

## MARKET OVERVIEW

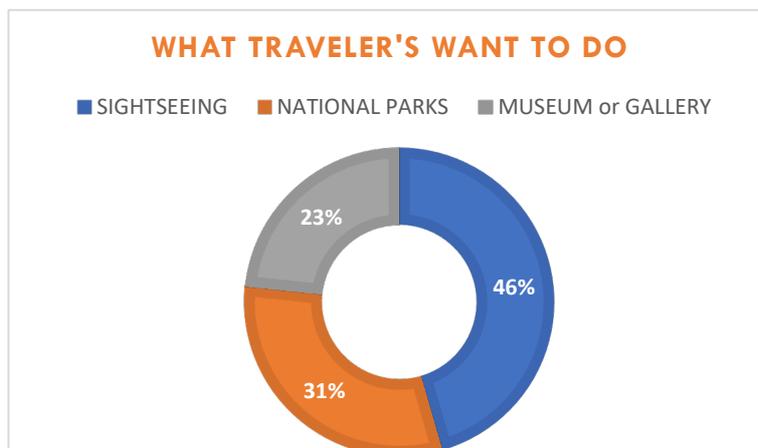


- USA remains **#1** long haul destination
- Overall growth to the USA is **4.3%**
- USA is on top of traveler's bucket list
- In May 8% 'vacation pay out'
- **67.9%** purpose of travel is vacation
- Spending average is **18** days
- Traveler's visit 2 /3 states per trip

"Tour operators seem satisfied with the 2018 results"

### THE DUTCH TRAVELERS

With a total spending of **19.8 billion** on traveling in 2018 (Dutch population = 17 million), the Dutch have spent 2% more on vacation than in 2017. Last year **83%** of the Dutch went on vacation, with an average of **3.5** vacations per year. The average vacation lasted 8,1 nights. Approx. **70%** of all vacations are booked online.



Hiking and camping have become twice as popular, from 7.1% to **14.3%**! This is in line with the trends.



They like to travel in pairs or with the whole family.

# BENELUX TRENDS



## ONLINE PRESENCE & ACTIVITY

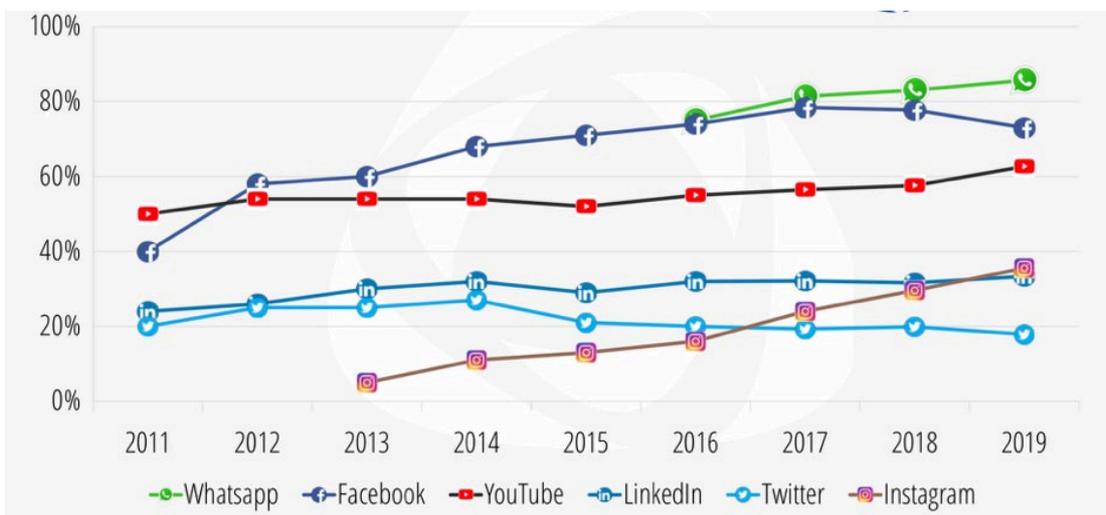
In 2018 **86%** of the Dutch people had a daily online presence, and more than **95%** of people between 12 and 45 years old used the internet on a daily basis. Also, **45%** of people above 75 years used internet daily. **98%** of the Dutch households have access to internet, which makes the Netherlands the online leader in Europe. Almost **50%** of the Dutch buy their own vacations, flights and accommodations online.

	2018	2019	+/-(#)	+/- (%)
	11.5 million	11.9 million	+ 380,000	+ 3%
	10.8 million	10.1 million	- 640,000	- 6%
	8.0 million	8.7 million	+ 720,000	+ 9%
	4.1 million	4.9 million	+ 830,000	+ 20%
	4.4 million	4.6 million	+ 250,000	+ 6%
	3.0 million	3.5 million	+ 525,000	+ 18%
	2.8 million	2.5 million	- 280,000	- 10%

Dutch social media users in January 2019

## SOCIAL MEDIA USAGE

650.000 Dutch Facebook users left the social media platform in 2018 due to the negative publicity and privacy concerns. Most of the Facebook leavers are people between the age of 15 and 19. Of the users above the age of 40 years almost nobody left and their numbers are stable. Where Facebook lost a large Dutch following, Instagram gained 830,000 Dutch users in 2018, which counts for a **20% growth**.



# BENELUX TRENDS



## TRAVEL TRENDS

**INDIVIDUAL RECOMMENDATIONS;** The consumer looks for personal travel recommendations and travel tips online and they consult travel blogs, online influencers and travel agents. **41%** of the travelers would like the travel industry to use technology that helps the customer filter their choice based on their previous travels.

**SUSTAINABLE TRAVELS;** The travel trade and key media in the Benelux are stressing the importance of sustainable travel. Climate change, preservation of nature and care for its local animal populations are increasing important factors in planning a vacation.

**SEEKING ADVENTURE & AUTHENTICITY;** Travelers have a preference for smaller and authentic accommodations instead of the larger chain hotels. In addition people also want to do outdoor activities and experience something new without getting too extreme. For example camping or horse riding in the middle of nature or taking a road trip without planning your destination.

**TRAVEL TRADE SHIFTS FROM 'BRICK' TO ONLINE;** The USA specialists distinguish themselves from the global tour operators by offering a complete USA program. While they feature a lot of sample itineraries online, almost every itinerary they book is tailor-made. Examples of these USA specialists are GoAmerika, US Travel, Dream Travel and Caribou Travel. Where the global tour operators mainly offer the most visited places and itineraries in the USA, the USA specialists in the Benelux are focusing more on itineraries in f.e. the DNE region.