

enjoyEngland ™

Germany market profile
updated January 2006



THE NETHERLANDS

Market profile

Updated January 2006

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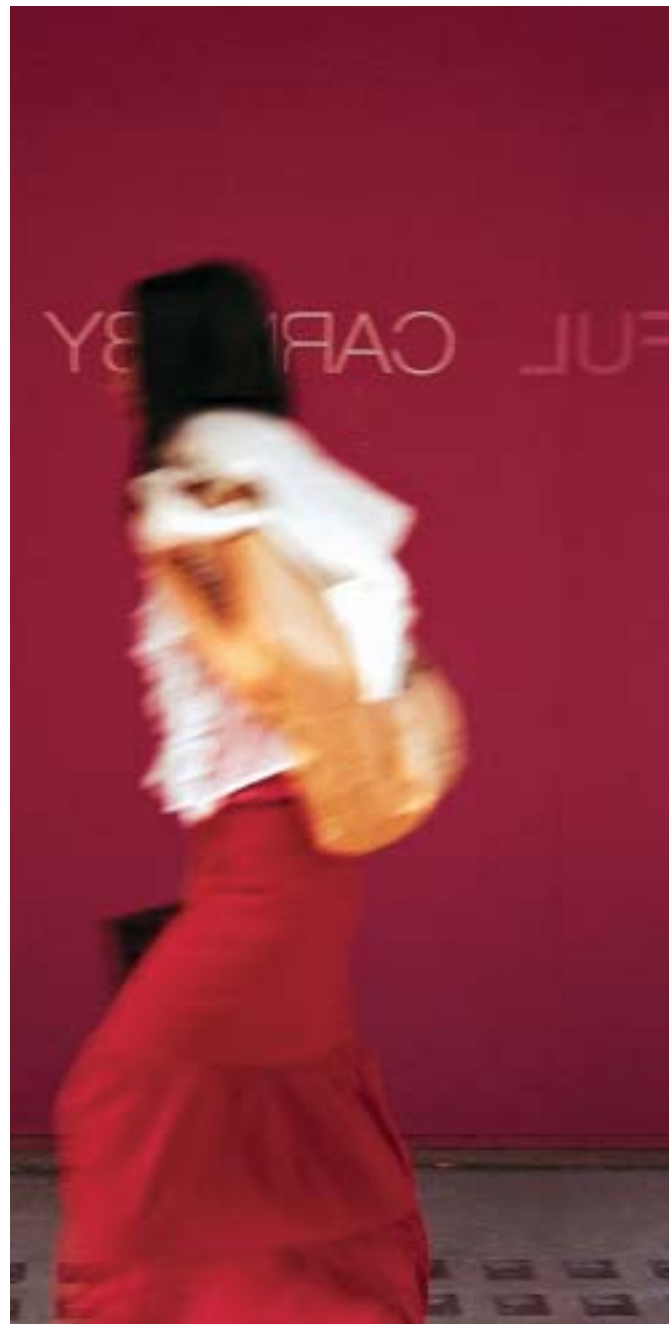
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1) Market snapshot

GENERAL MARKET CONDITIONS

- Population 16.3 million – static
- IMF Forecasts 2006: GDP (based on PPP per capita) USD\$31,190. GDP Growth Rate 2%. Unemployment 4.5%. Inflation 1.8%

ACCESS OVERVIEW

- NO visa required
- By Air – 20 England airports receive direct flights from Amsterdam, with a total of 750 flights per week. Eindhoven (27 flights a week into London airports). Rotterdam (98 flights a week into London airports)
- By Sea – Hook of Holland to Harwich (4 sailings per day), Rotterdam to Hull (daily) and Amsterdam to Newcastle (daily)

MARKET SIZING / MARKET SHARE

- 29.4 million outbound in 2004. England has 4.4% market share
- UK ranked 5th outbound destination (top three: France, Germany and Spain)
- 1.3 million visits in 2004 (+2% on 2003)
- £401m spent in 2004 (+3% on 2003). AEV £313; AED £73

MARKET SHAPE / MARKET DYNAMICS

- 33% are HOLIDAY visitors; 30% BUSINESS
- 73% stay 1-7 nights
- Top Towns = London, followed by Birmingham, Manchester and Bristol

PRODUCT / MARKET FIT

- History / Heritage / Culture, Countryside, Outdoor activities, City Breaks

DEMOGRAPHICS / POTENTIAL CONSUMER SEGMENTS

- Independent Wanderers / Touring Seniors / Cultural Wealthy / Organised Elderly / Enthusiastic Sportsmen / Religious Greens

REACHING THE DUTCH CONSUMER

- Internet access 66%

2) General market conditions

Population / languages

The US Census Bureau puts the population of the Netherlands at 16.3 million in 2004.

The population is forecast to grow to 17 million by 2014.

The Netherlands is one of the most densely populated countries in the world. 40% of its 16.3m population live in the highly urbanised Randstad area.

Language: Dutch and Frisian (official).



Economics / politics

The Dutch rejected the draft EU Constitution in the summer of 2005 but the government survived this setback and is expected to remain in power until the next elections due in May 2007.

The Netherlands has an advanced economy, which combines high income per head with a fairly even income distribution. As exports and imports of goods and services both account for well over 60% of nominal GDP, the life-blood of Dutch prosperity is foreign trade. There are significant flows of foreign direct investment flowing in both directions between the UK and the Netherlands.

Economic performance in the Netherlands has been somewhat stronger than seen in many of its neighbours, but nevertheless the Economist estimate that growth will have slipped to a little over 1% during 2005. Faster growth is forecast for both 2006 and 2007 driven along by strong private sector consumption as well as in investment.

In line with all other Eurozone countries interest rates in the Netherlands were recently increased by 1/4% by the European Central Bank but this has had little impact on the value of the Euro against Sterling.

Holidays / annual leave

Dutch employees receive an average of 23 days annual leave.

3) Access overview

Political situation

No political issues currently exist to restrict travel to England from the Netherlands.

Passport and visa issues

Dutch visitors do NOT require a visa to visit England.

Gateways / access to England

In 2004 (IPS), 57% of visitors from the Netherlands travelled to England by air, 32% by sea and 11% by tunnel.

By sea

It is possible to reach England from the Netherlands by sea, with up to 4 sailings per day from Hook of Holland to Harwich, daily sailings from Rotterdam to Hull and from Amsterdam to Newcastle.

Crossing times range from 5 hours to 16 hours.

By air

There are no fewer than 20 English airports receiving direct flights from Amsterdam, with a total of 750 flights per week.

From Eindhoven there are 12 flights per week to Stansted and 15 flights per week to Heathrow.

From Rotterdam there are 14 flights per week to Stansted, 21 flights per week to Heathrow and 63 flights per week to London City.

Flight time is typically between 1 and 2 hours.

4) Market sizing/share

Current & forecast market size

Global Insight estimates that there were 29.4 million outbound overnight visits from the Netherlands in 2004.

There are forecast to be 34.4 million such trips by 2010, an increase of 17%.

England currently accounts for around 4.4% of outbound trips from the Netherlands.

Current volume and value statistics / trends

	2003	2004	Change year on year
Total Visits	1,260,000	1,280,000	+2%
Visits Rank (League Table No. Visitors to England)	5	6	Down 1 place
Total Spend	£390m	£401m	+3%
Spend Rank (League Table £ Spend in England)	8	8	No change
Average Spend per Visit (AEV)	£310	£313	+1%
AEV Rank	Outside top 30 rankings		
Average Spend per Day (AED)	£63	£73	+15%
AED Rank	26	17	Up 9 places
<i>Source: IPS</i>			

Key competitor destinations – actual

Although this does not separate out England, the Global Tourism Navigator shows us that the UK was 5th in the actual ranking of top destinations (short and long haul included) for Dutch outbound travel in 2004.

1	France	6	Austria
2	Germany	7	Turkey
3	Spain	8	Greece
4	Belgium	9	Switzerland
5	UK	10	Portugal



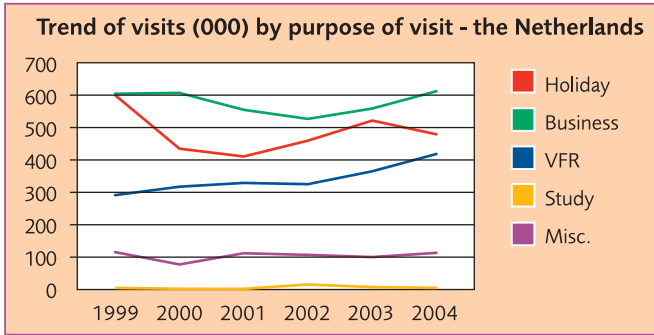
Key competitor destinations – aspirational

According to the Anholt-GMI Nation Brands Index (Wave 3 2005), which surveys a representative n=1000 sample of the online population in the Netherlands, the UK is ranked 4th out of 24 (i.e. not all potential are asked about) destinations that would be likely for a leisure visit "if money were no object".

1	Australia	6	Spain
2	Canada	7	Sweden
3	New Zealand	8	france
4	UK	9	Germanys
5	Italy	10	United States

5) Market shape/dynamics

Purpose of visit

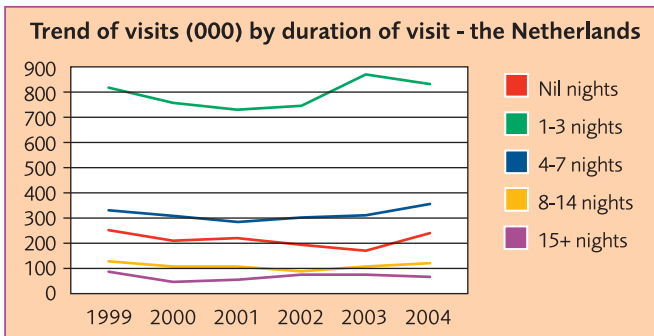


30% of the visitors from the Netherlands to England come for the purpose of a holiday.

30% travel to England to visit friends or relatives. This proportion has constantly increased in the past 6 years.

The largest proportion of travellers from the Netherlands visit England for business (33%).

Length of stay



88% of Dutch visitors stay in England for less than 8 nights with 51% travelling to England for a short break (1-3 nights).

81% of holiday visitors stay in England for 7 nights or less. The holiday short-break market accounts for 44% of holiday visits and 27% are 4-7 night stays.

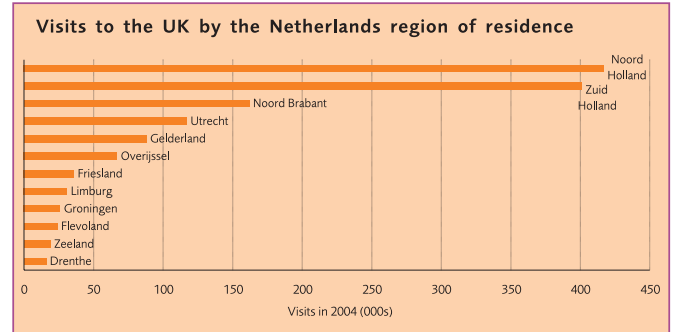
VFR visitors tend to stay for about the same length of time as holidaymakers.



Where do they come from?

Each year visitors from a small number of countries are asked more detailed questions about their region of residence in the International Passenger Survey.

For the Netherlands the regions of Noord Holland and Zuid Holland dominate.



Regional spread / top towns

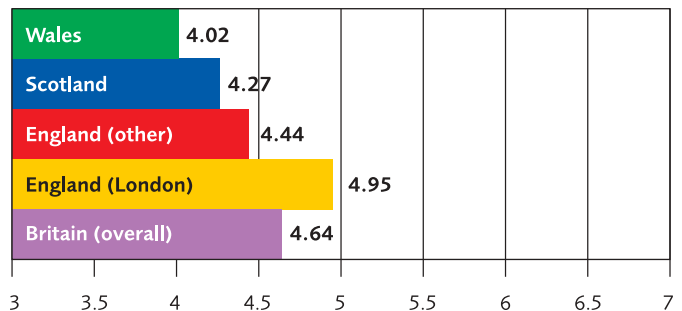
Top Towns for Dutch visitors in 2004 were:

		Visits (000)
1	London	578
2	Birmingham	51
3	Manchester	32
4	Bristol	19

The GMI Nation Brand Index research asked 1,000 Dutch respondents about their awareness of the regions of Britain. Participants were also asked how well they felt they knew the regions of Britain - giving a score of 1-7 and taking into account any of the ways they had learned or heard about each region. 1 = never heard of the region and 7 = know the region very well.

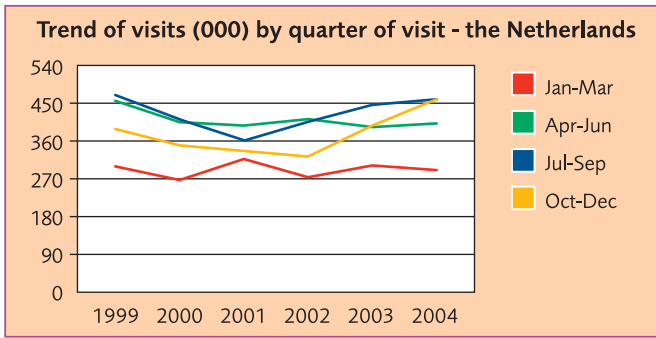
The chart below shows that overall London is the most well known region, followed by Britain overall and then England. Wales is the least well known.

When looking only at those 649 Dutch respondents who have been to Britain, regional knowledge increases for all regions, particularly awareness of London (up to 5.30).



5) Market shape/dynamics

Seasonal spread



The final two quarters are the most popular time for Dutch residents to visit England, with 28% of Dutch visitors arriving between July and September and 27% of Dutch visitors visiting between October and December (29%).

The summer months between July and September are the most popular for those on holiday (32%).

Those visiting friends and relatives favour the last half of the year (55%).

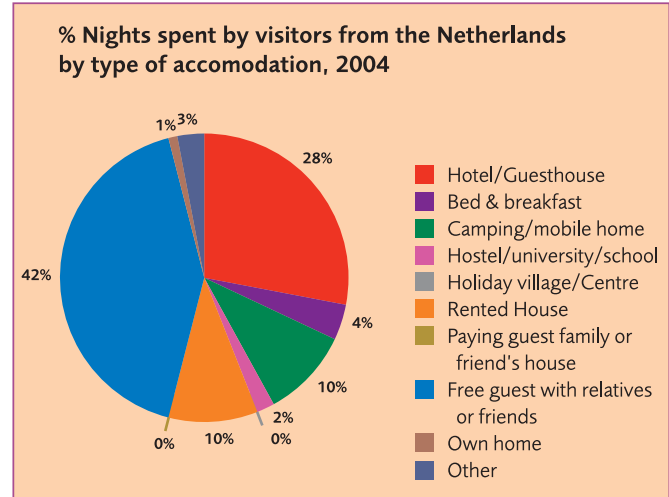
Accommodation type

47% of Dutch visitors stay in a hotel or guesthouse when they visit England, which accounts for 27% of nights spent.

52% of holiday visitors stay in hotel/guesthouse, 20% as free guests and 9% in a B&B.

86% of VFR visitors stay as free guests with friends and relatives.

74% of Business visitors stay in a hotel or guesthouse.



6) England's brand image in the Netherlands

The main pillars of the England brand in the Netherlands are Discover, Fun and Indulgent. The England brand model can be said to be describing 3 key need states ('The 3 Pillars'):

- **Discover:** The need to absorb, learn and experience.
- **Fun:** The need 'To Do', to be active and proactive, avoiding sitting around doing nothing, bonding with friends and family, letting off steam, etc.
- **Indulgent:** The need to 'Reward yourself' to counter act the stresses and strains of modern everyday life.

These elements of the brand are shown in the brand wheel below:



Perceptions of England

Project Lion Brand Development Research carried out in the Netherlands in 2002 discovered that England was clearly perceived as a close holiday destination for travellers from the Netherlands, who have built up a very rich image of England as a result of this proximity, and through their learning of English at school.

Knowledge of England is high and many are keen to gain an even deeper understanding of the familiar sights of London and the Lake District as well as exploring other areas of England.

England is considered a place to travel around and explore, with new experiences and insights to offer. It offers greater variety and contrasts of places and landscapes than home.

Many of the Dutch respondents were positive about England's distinct position within Europe. They saw this as a key point of difference and a prime reason why one might wish to visit England - "It's different from the rest of Europe, England is the example of difference: cucumber sandwiches, High Tea, stiff traditions".

7) Product / market fit

What products / experiences are most attractive to Dutch visitors?

History / Heritage / Culture

The Dutch revel in England's heritage and will visit England's stately homes and gardens, castles, towns and villages.

As excellent linguists, they can fully enjoy the splendours of English culture, including theatre and opera.

Countryside

Unsurprisingly, one of the main motivational triggers for visiting England is the wide and varied landscape.

England has a very different product to that offered by the Netherlands itself with little inland or coastal scenic variety.

Outdoor activities

Outdoor activity and soft adventure - particularly walking and cycling (the latter being particularly popular with the Dutch) offer strong marketing propositions for England.

Generally, 'green' travel products, whether walking, cycling, camping, visits to gardens or simply escaping a crowded urban life, are increasingly in demand.

City breaks

The potential for city break traffic has also increased substantially over the last 2 years with the explosion of low-costs airlines, especially from Amsterdam's Schiphol Airport.

According to a Cities Trips research paper from CVO, more than one third of Dutch travellers interested in taking a city trip say that low-cost carriers are a reason to go on extra city trips. City and Short-Break products have a good opportunity to win business from this market in 2006.

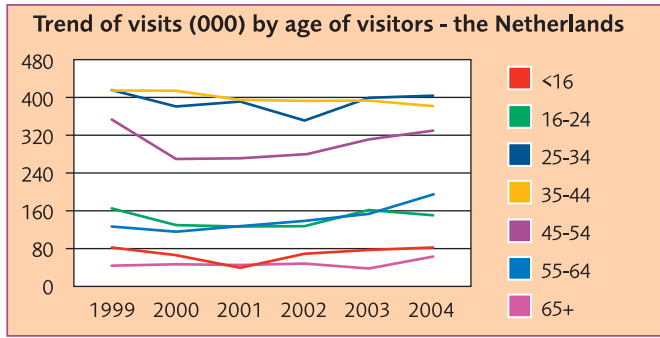
Additional research planned

Enjoy England has a research programme in place to examine perceptions of England as a holiday destination amongst the Dutch. Research is planned for April 2006. The barriers and triggers to travel in England will be examined while insights for creating effective marketing communication with Dutch visitors will be generated.



8) Who is the Dutch visitor?

Demographics



39% of visitors from the Netherlands are aged under than 35. The proportion of this age group is slightly larger amongst VFR visitors (46%). The under 35 accounts for 42% of holiday visitors.

Overall, 38% of visitors are female and 62% male.

Age Group	Male %	Female %
0 - 15	4	7
16 - 24	9	10
25 - 34	24	26
35 - 44	25	21
45 - 54	22	17
55 - 64	11	14
65+	3	5

Travelling Group 2003	% of Visits
Lone traveller	42
As a couple/with partner	18
Group of friends	8
Family group	17
Business colleagues	9
Tour group	6
Other	0
Don't know	0

In terms of travelling group - 42% of the Dutch visitors were lone travellers in 2003.

Visitors travelling as a couple were the second largest segment of group composition (18%).



VB key market segments

Visit Britain Amsterdam ran its customer database through a lifestyle profiling analysis programme in 2003. This profiling identified six main lifestyle segments in the Visit Britain Amsterdam database.

Independent wanderers (32% of analysed addresses)

Younger people, not older than 35 and families with older (10-17 years) children. Going on holidays in high season in Europe for about 2 weeks. Trekking and touring with overnight stays in B&B's or at camp sites. Interested in both culture and nature as well as shopping. This segment is highly interested in going out and music and loves to watch series on television and other entertainment programmes.

Touring seniors (24% of analysed addresses)

Touring seniors enjoy their leisure now they have retired. They enjoy several short holidays per year. In spring they take their time to tour around England with their car and caravan for 2 weeks or more. They visit cultural attractions, as well as English gardens. Income is average to twice average.

Cultural wealthy (17% of analysed addresses)

Cultural wealthy have a busy life. These singles and couples with an age between 35 and 60. To escape their busy life, they take a short break in off season, go sailing or play golf. This segment has an income of 1.5-3 times average.

Organised elderly (11% of analysed addresses)

Organised elderly usually are couples or singles. They like to book an organised (coach) tour for about 1 week, or maybe 2 weeks to cities (London) as well as gardens. They prefer to stay in hotels. About 52% of this segment do not have a connection to the internet.

Enthusiastic sportsmen (10% of analysed addresses)

When they go on holiday, they take their video or photo camera with them and travel by car. The beautiful countryside is being explored by bicycle or by foot. They also play golf. The income of this segment is 1.5-3 times average.

Religious greens (5% of analysed addresses)

Religious greens have a few working years to go or are retired already. Their 2 weeks or longer summer holiday will be based on nature and countryside. Most of the people travel in high season and spend the night at a campsite or in a holiday home. Income is modal to 1.5 times average.

1st Timers & repeat visitors

In 2004, 88% of visitors from the Netherlands had visited England previously within the last 10 years (IPS).

9) Caring for the Dutch consumer

Language / information provision

It is unlikely that there will be a language barrier. The vast majority of Dutch within England's target customer groups will have at the very least a more than adequate command of English and will be eager to make use of it.

However, when marketing to the Dutch, language becomes very important. Wherever possible, you should have your Dutch website and promotional literature translated into Dutch.

Personal advice is always appreciated, and recommendations on things to see and do in your area, where to eat out, how to use public transport etc. can keep your Dutch visitors with you longer and encourage them to come back.

Accommodation

For the Dutch, cleanliness is very important.

If you receive complaints from Dutch visitors, try to resolve them on the spot. The Dutch are notoriously tenacious.

Value for money

England is perceived as an expensive destination as there is a lack of understanding between sterling and the Euro exchange rates.

Moreover, the old adage of Dutch thriftiness still holds some resonance. They continue to look for and expect a quality product for a value for money price. But a significant proportion of the market will pay a little extra for a quality experience e.g. mid-price accommodation, spa products and culinary breaks.

10) Reaching Dutch consumers

Deciding, planning & booking patterns

The Dutch are information hungry. Before travelling, they try to find out as much as possible about their destination through the internet, books and brochures.

Online environment

Internet and e-commerce play a huge role in Dutch life. Over 74% of the population have home access and 82% of these go on-line at least once a week. Internet usage among best prospects for travel to England varies significantly depending on lifestyle segment. Over 85% of Enjoy England's Cultural Wealthy and Enthusiastic Sportsmen segments have home internet access, making them prime candidates for online marketing. Less than 50% of the Organised Elderly have home internet access.

The move towards online delivery and bookings continues. It is predicted that in the near future more than half of all the Dutch will book their holidays via the internet. Research company TNS NIPO report 35% of all trips were booked via the internet in 2004. According to NIPO a percentage of 50% is realistic. It is no surprise to learn that tour operators and carriers continue to put an increasing marketing effort into improving their direct online delivery channels to win business online.

Media habits

The main newspapers and magazines are listed below, many of whom publish England articles as a result of Enjoy England's proactive media relations activity. These include:

	Circulation	
Algemeen Dagblad	360,000	(Liberal)
NRC Handelsblad	265,000	(Liberal)
Het Parool	90,360	(Independent local paper)
De Telegraaf	808,300	(Conservative)
Trouw	126,000	(Protestant)
De Volkskrant	346,000	(Progressive)

Magazines

	Circulation	
Kampioen	3.5 million	Monthly magazine. Published by the ANWB (Dutch AA), and sent to all members, reaching an estimated 50% of all Dutch families. Classified advertising section.
Reizen	48,200	Another ANWB monthly, concentrating on travel, mostly for the independent traveller, with most readers falling into the higher income brackets.

Other key consumer travel magazines include Grande, National Geographic Traveller, Reisgids Op Pad, and Reis & Geniet.

Travel trade press

DIT Reismanagement
Reisrevue
Reisburo
Travelution
TravelMatch

Working with Enjoy England

Taking part in the Enjoy England marketing campaigns is the ideal way to make your marketing budget work harder. Combining detailed knowledge of proven routes to market, with innovative promotional channels and a fresh campaign look and feel, ensures that your brand obtains maximum cut-through in today's crowded market-place.

Different campaign participation levels are available depending on preferred promotional channels and budget available. The packaged opportunities below are designed to offer you maximum exposure for your money, but there is some room for flexibility, according to your needs. Please enquire for further information.

shortbreakEngland (Sept – Dec 06)

Highlighting the excellent accessibility to England from the Netherlands, England's Short Breaks campaigns will showcase the diversity and value for money of England as a short break destination. Focusing on England's dynamic towns and cities, with their blend of the historical and the modern, and the stunning countryside just a stone's throw from

England's city centres, the campaigns will use a strong tactical message to encourage consumers to take a short break in England.

Web listing: £3,500

Only available to commercial partners

Level 1: £6,000

Activity	Details
Website	<ul style="list-style-type: none"> Enhanced presence on website Online competitions
Online advertising	<ul style="list-style-type: none"> Search Engine Marketing Generic campaign advertising on key travel and lifestyle websites. Techniques to include banner advertising, pop unders, pop-ups and I-leads. Promotion of campaign website on VisitBritain.com/nl Campaign e-viral
Press & PR	<ul style="list-style-type: none"> Presence in generic press & PR work for the campaign
E-direct mail	<ul style="list-style-type: none"> Presence in e-DM to England database Presence in e-newsletter to 35,000 contacts on the VisitBritain Netherlands database

Level 2: £15,000

Activity	Details
Website	<ul style="list-style-type: none"> Maximum presence on website Online competitions
Online advertising	<ul style="list-style-type: none"> Search Engine Marketing Generic campaign advertising on key travel and lifestyle websites. Techniques to include banner advertising, pop unders, pop-ups and I-leads. Promotion of campaign website on VisitBritain.com/nl Campaign e-viral Partner branded online advertising
Press & PR	<ul style="list-style-type: none"> Presence in generic press & PR work for the campaign Inclusion in campaign press trip, subject to newsworthiness
E-direct mail	<ul style="list-style-type: none"> Presence in e-DM to England database Presence in TWO e-newsletters to 35,000 contacts on the VisitBritain Netherlands database Follow-Up E-Mailing to all new contacts E-DM to external database

tourEngland (Jan - Apr 07)

Focusing on the highlights of quintessential England, the touring campaign will aim to raise awareness of England's regional diversity – and to showcase what there is to see and do beyond the capital city.

With suggested driving tours, featuring key sights throughout the country, this year's campaign will also incorporate a strong walking element, as well as partner-led tactical offers to drive bookings.

Level 1: £6000

Activity	Details
Website	<ul style="list-style-type: none"> Presence on website Online competitions
Online advertising	<ul style="list-style-type: none"> Search Engine Marketing Generic campaign advertising on key travel and lifestyle websites e.g. Reiskrant.nl, Planet.nl. Promotion of campaign website on VisitBritain.com/nl
E-direct mail	<ul style="list-style-type: none"> Presence in e-DM to England database Presence in e-newsletter to 35,000 contacts on the VisitBritain Netherlands database
Press & PR	<ul style="list-style-type: none"> Presence in generic press & PR work for the campaign
Brochure fulfilment	<ul style="list-style-type: none"> Quarter page advert in Touring brochure. This will be a 52 page brochure, and 50,000 copies will be produced and distributed.

Level 2: £15,000

Activity	Details
Website	<ul style="list-style-type: none"> Enhanced presence on website Online competitions
Online advertising	<ul style="list-style-type: none"> Search Engine Marketing Generic campaign advertising on key travel and lifestyle websites e.g. Reiskrant.nl, Planet.nl. Promotion of campaign website on VisitBritain.com/nl
E-direct mail	<ul style="list-style-type: none"> Presence in e-DM to England database Presence in e-newsletter to 35,000 contacts on the VisitBritain Netherlands database E-DM to external database
Press & PR	<ul style="list-style-type: none"> Presence in generic press & PR work for the campaign
Brochure fulfilment	<ul style="list-style-type: none"> Half page advert in Touring brochure. This will be a 52 page brochure, and 50,000 copies will be produced and distributed.
Direct Mail	<ul style="list-style-type: none"> Feature in DM to 50,000 contacts from VB database Feature in DM to external database

Level 3: £30,000

Activity	Details
Website	<ul style="list-style-type: none"> Maximum presence on website Online competitions
Online advertising	<ul style="list-style-type: none"> Search Engine Marketing Generic campaign advertising on key travel and lifestyle websites e.g. Reiskrant.nl, Planet.nl. Promotion of campaign website on VisitBritain.com/nl Partner branded online advertising
E-direct mail	<ul style="list-style-type: none"> Presence in e-DM to England database Presence on e-direct mail to 35,000 contacts on the VisitBritain Netherlands database E-DM to external database
Press & PR	<ul style="list-style-type: none"> Presence in generic press & PR work for the campaign Inclusion in campaign press trip, subject to newsworthiness
Brochure fulfilment	<ul style="list-style-type: none"> Full page advert in Touring brochure. This will be a 52 page brochure, and 50,000 copies will be produced and distributed.
Direct Mail	<ul style="list-style-type: none"> Feature in DM to 50,000 contacts from VB database Feature in DM to external database
Offline advertising	<ul style="list-style-type: none"> Full colour press ads (partner branded) to be inserted with reply cards in travel and lifestyle magazines

Stand-alone brochure advertising

In addition to the campaign packages available, it is also possible to place an advertisement in the Netherlands touring brochure. Rates are as follows:

Full page	£2,100
Half page	£1,200
Quarter page	£700
1/8 page	£400

Additional opportunities

In addition to the Enjoy England consumer campaigns, a number of other marketing activities are available through VisitBritain (e.g. brochure distribution, presence at consumer exhibitions). Please contact VisitBritain for further details.

11) The trade

Overview of trade structure

The Dutch travel trade is made up of tour operators, coach operators and travel agencies. In addition, associations such as walking clubs or evening colleges will also organise holidays for their members through travel agents.

- **Tour operators** sell their product through their own or independent travel agencies. Increasingly, they also sell directly to the consumer through the internet (although for holidays to England, number of direct sales are probably not significant).
- **Coach operators** usually sell their products (coach tours) through their own or independent travel agencies.
- **Travel agencies** usually sell products produced by tour or coach operators. Some travel agencies, however, also have a group department that organises holidays for associations.

Increasing numbers of retail trade operations in the Netherlands are reporting financial difficulties, partly due to the influence of the internet. This is likely to result in further consolidation and contraction in the industry, with the survivors being those who adapt to niche product opportunities and to a more service-oriented culture. Many of the larger tourism providers still get the vast majority of their bookings via the trade.

Dutch tour operators

The package holiday market is dominated by TUI and Thomas Cook. Between them they account for a third of all package holiday bookings. Giants though they may be in the Netherlands, major operators are relatively small fry. German conglomerates now own these companies. This type of consolidation has seen decreased flexibility on new programming and increased pressure on suppliers' prices.

Sea carriers like P&O Ferries, Stena Line and DFDS Seaways all produce good quality, inclusive brochures with a broad range of England holiday products.

Neither the big-name tour operators nor the medium-sized general operators can afford to leave England out of their programming. However, English products featured by the bigger operators reflect little creative programming, relying on London and coach tours and attract only limited marketing commitment. Exceptions to this rule are De Jong Intra Vakanties, Holland International, Buro Britain and OAD Reizen, all of which have extensive all-England printed brochures.

The main planning period for tour operators is Sept/Oct. The Dutch still start their holiday planning as early as Dec/Jan, so operators will have main-season programmes finalised in time for this period. In 2005 NL British Interest Group members see a significant trend towards later bookings. Customers are waiting for special offers and better weather before deciding on final main season destinations.



Among medium and smaller operators the trend has been to specialise to survive: to offer the kind of programmes which make little sense in volume terms to the major players. There are some England specialists that are now well established in the Dutch market, however the problems of the last few years have seen the number of these specialists decline. These are normally small individually owned operations specialising in a variety of special interest holidays including cycling, walking, golf, sailing and garden tours to name a few.

Try to avoid scheduling sales calls with operators in July or August.

Dutch travel agencies

There are some 1,680 ANVR agencies in the Netherlands (those belonging to the Dutch Federation of Travel Agents). In addition, there are 500 Rabobank outlets selling travel packages, accounting for 10% of overall packages.

Retail agents with groups departments occasionally initiate special tours and excursions, usually in conjunction with a newspaper or an association.

Key carriers for the market

Accessibility by both air and sea has never been better between the Netherlands and England. There are 12 airlines operating to with over 50 flights a day to London alone. Although the surface carriers have lost ground to the airlines, the ferry companies and Eurotunnel have fought back by using state of the art equipment like the HSS ticketing system and offering a wide range of fares and special deals.

Airlines

BmiBaby (WW)	www.bmibaby.com
Bmi British Midland (BD)	www.flybmi.com
British Airways (BA)	www.ba.com
EasyJet (EZY)	www.easyjet.com
Jet2.com (LS)	www.jet2.com
Ryanair (FR)	www.ryanair.com
Thomsonfly (TOM)	www.thomsonfly.com
Transavia.com (HV)	www.transavia.com
VLM Airlines (VG)	www.vlm-airlines.com

Ferry companies

DFDS Seaways	www.dfdseaways.com
Stena Line	www.stenaline.com
P&O Ferries	www.poferries.com
Sea France	www.seafrance.com
Superfast Ferries	www.superfast.com
Thomsonfly (TOM)	www.thomsonfly.com

Train companies

Eurotunnel	www.eurotunnel.com
Eurostar	www.eurostar.com

Reaching the Dutch travel trade – sales calls

Timing

Avoid calls in July and August as people are generally on holiday. Also avoid the South on 6, 7, and 8 February (carnival celebrations). If you are visiting in the spring, remember to book accommodation in advance particularly for Amsterdam, as this is 'bulb time'.

Office hours are generally 0900-1700, with only a brief pause for lunch, which is normally no more than a sandwich. Postpone business entertaining until you have developed personal relationships. Even then a quick lunch is likely to prove more acceptable - and hence more productive - than dinner. The Dutch value their private life.

Public holidays 2006

Jan 1, April 14, April 16, April 17, April 29, May 5, May 25, June 4, June 5, Dec 25, Dec 26.

Transport

You are better off travelling by public transport than by car, especially in the Randstad area. Dutch driving is more aggressive than British. Motorways are frequently congested; parking is difficult (and expensive); wheel clamping is rife - particularly in Amsterdam - and break-ins are frequent, especially to foreign-registered cars.

Etiquette

Make appointments in advance – preferably by fax and if necessary with a follow-up phone call a few days later. Re-confirm verbal arrangements by e-mail, fax or letter.

Announce your name and company when asking for people by phone. This is standard Dutch practice.

Send potential business partners your sales documentation in advance, so that they can do their preparatory homework.

Be punctual. The Dutch tend to arrive early for appointments and will expect you to turn up on time. Try to get a message through if you are delayed.

Get to the point. Your contacts will assume you want to do business and are much more likely to respond positively to a direct and forthright approach.

If your visit coincides with birthday celebrations, offer your congratulations. The Dutch place great emphasis on birthdays.

Prove that you mean business by following up as soon as you get home.

Finally, remember that loyalty pays. Remain faithful to your Dutch business partner and they will remain faithful to you.

Language / culture / currency

As the ability to communicate in English is a basic prerequisite for anyone working in the Dutch travel trade, it can be tempting to talk to business partners as if they were native speakers. Few are. Keep language straightforward and avoid ambiguity. Wherever possible, you should have your Dutch website and promotional literature translated into Dutch.



12) Business visits / events

Business visits statistics

33% of travel from the Netherlands to England is for business purposes, and this accounts for 49% of spend (IPS).

Business visitors the Netherlands	Visits 2004 (000)	% Business Visits	Spend 2004 (£m)	% Business Spend
Trade Fair / Exhibition	25	2.5	9	3.9
Conference / Large Meeting	72	7.3	19	8.6
Other Business	901	90.3	195	87.6

Source: IPS

Business visitors the Netherlands	AEV (£)	AED (£)	ALS (days)
Trade Fair / Exhibition	351	167	2.1
Conference / Large Meeting	264	125	2.1
Other Business	217	73	3.0

Source: IPS

Dutch business visits are made up of 12% Conferences, Large Meetings, Trade Fairs or Exhibitions and 88% individual business travel.

Meet England – business visits & events opportunities

Hospitality England campaign - Winter 2006

Sponsorship Packages **from £1000**

Dedicated campaign to promote the wide range of sporting and non-sporting hospitality activities geared towards the corporate and incentive markets.

Suitable for Venues & Attractions offering corporate hospitality packages, Corporate Hospitality Agencies, Ticket Agents, Hotel Groups (offering bespoke packages).

English country conferences - Spring 2007

Sponsorship Packages **from £1000**

Business Meetings, Conferences and Incentives at countryside venues are the theme of this campaign, which will include Country House Hotels, Conference Centres and Stately Homes.

Destination features

Business Pursuits England Feature in MiCE! Magazine. Advertorial covering product and destinations offering incentive and teambuilding solutions **from €2000**



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Further information

ANVR – Dutch Association of travel agents with approx. 1100 members. A list of members is available – www.anvr.nl

N.A.T.M. – The Dutch Association of Travel Managers in Industry and Commerce (approx. 75 members). A handbook listing of the companies and their travel managers is available – www.natm.nl

Visitor's Voice is a quarterly newsletter offering insights from our latest research and can be obtained each quarter by signing up for VisitBritain's e-bulletin, UK Industry News, at www.visitbritain.com/ukindustry.

To find out more about VisitBritain's research visit www.visitbritain.com/research.

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Information sources used to compile this report

International Passenger Survey figures (IPS) 2004 (Office for National Statistics)

NB: Data from International Passenger Survey has been made available by the Office for National Statistics and has been used by permission. The ONS do not bear any responsibility for the analysis or interpretation of the data reported here.

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- VisitBritain Brand Tracking Research – 2003 (Quantitative)
- VisitBritain Project Lion Brand Development Research (Qualitative) - 2002
- Foresight – January 2006
- IMF / Economist / US Census Bureau
- BBC websites
- Global Tourism Navigator
- FCO (Foreign & Commonwealth Office)
- ETC (European Travel Commission) and ETC New Media Review
- VisitBritain Netherlands Business Plans, Insights and Intelligence Reports 2005