



UNLOCKING THE NETHERLANDS MARKET

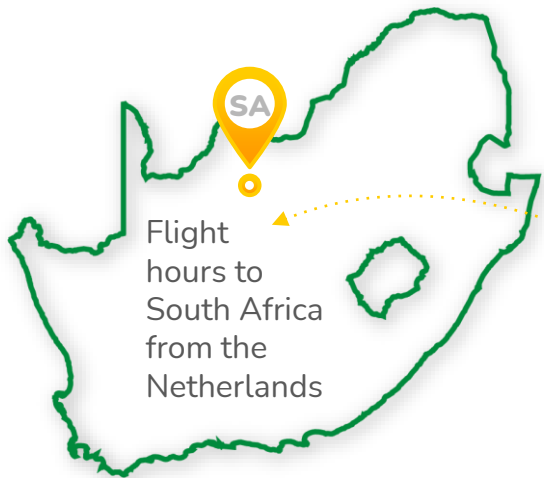
BY SAT INSIGHTS UNIT



SOUTH AFRICAN TOURISM



Netherlands facts



Amsterdam:
11 hours
(Johannesburg direct)



CURRENCY
Euro (€)
Exchange rate 2022:
R17,21 to €1



GDP
per capita
\$53 767 (2021)

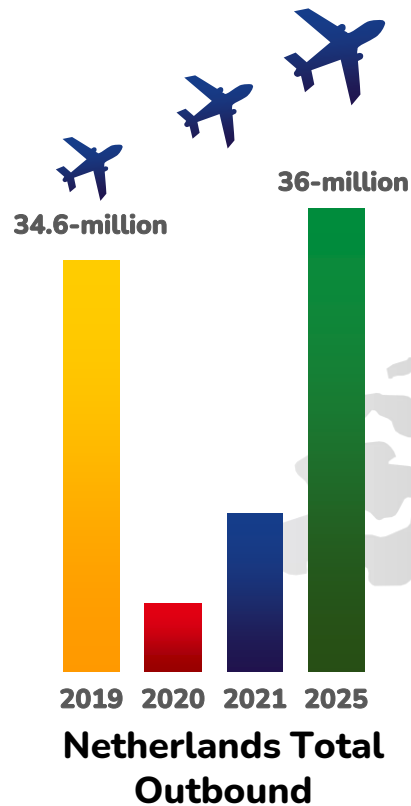


The Dutch are keen travellers, and Amsterdam is a cosmopolitan city and home to consumers from some 178 different cultural backgrounds

Netherlands travel status

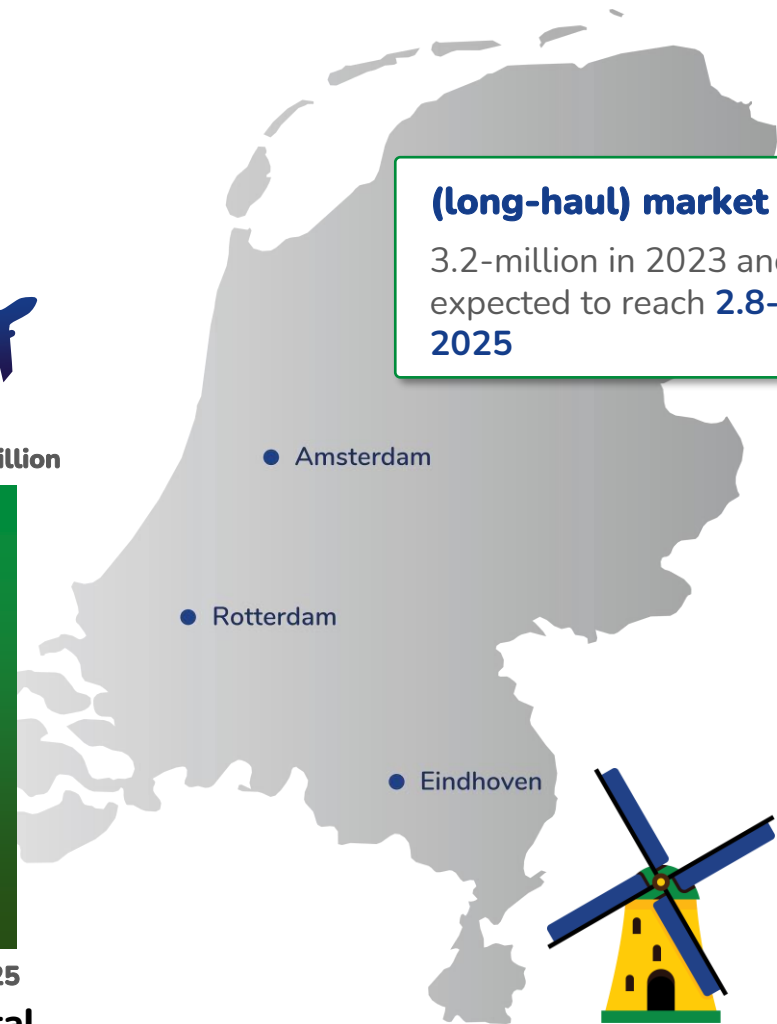
Dutch global outbound tourist numbers are expected to reach and surpass 2019's 35-million by **2024**, reaching **36-million+**

Dutch outbound tourist numbers to **sub-Saharan Africa** are expected to reach **pre-pandemic levels by 2025**



(long-haul) market size:

3.2-million in 2023 and expected to reach **2.8-million in 2025**



Netherlands travel trends

Although e-commerce grew strongly during the pandemic when shops were closed, the Dutch have been slower at embracing online shopping than their global counterparts

Dutch consumers are highly interested in environmental issues and this impacts buying behaviour

Mobile shopping is far more common among younger age groups: 34% of Millennials (but just 8% of Baby Boomers)

The Netherlands enjoys a relatively high degree of income equality, and its large middle class consumer base ensures strong demand for all types of consumer goods.

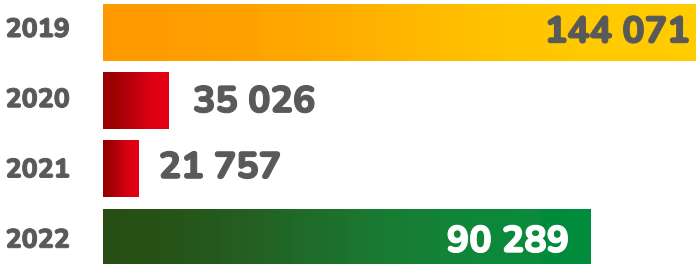
Competition for the Dutch market

The Netherlands is a growth market for South Africa




Over the past 10 years the number of Dutch visitors to South Africa has **grown by 2.3%**, ahead of the Netherlands' total outbound tourist growth of 1.7%

Arrivals



South Africa is foreseen to see **slower growth** from the Dutch market, as these markets recover ahead of the curve - exceeding 2019 levels by 2025

- #1  **Brazil**
- #2  **Indonesia**
- #3  **Kenya**

-  **Australia**
-  **USA**
-  **Thailand**
-  **China**
-  **Canada**
-  **India**
-  **Mexico**
-  **Brazil**

Other competitors

Dutch travellers are looking for



Destinations that are less crowded



Sustainable travel options



Wellness retreats



Authentic experiences



Value for money

Dutch travellers prioritise these activities, globally



Relaxation



City breaks



Nature and outdoor activities

Getting to South Africa



KLM Royal Dutch Airlines operates several direct daily flights between Amsterdam and Johannesburg or Cape Town



Other airlines that offer flights between Amsterdam and South Africa are:



Lufthansa



Average fare



Amsterdam to JHB

€366/R7 100

Amsterdam to CPT

€450/R8 700

Flight duration: direct



Amsterdam to JHB

11 hours

Amsterdam to CPT

11.5 hours

Profile of the Dutch traveller to South Africa

25 to 40

Aged 25 to 40



3 in 5 are male



Travel alone or with spouse/partner



Come for holiday/to visit friends and relatives



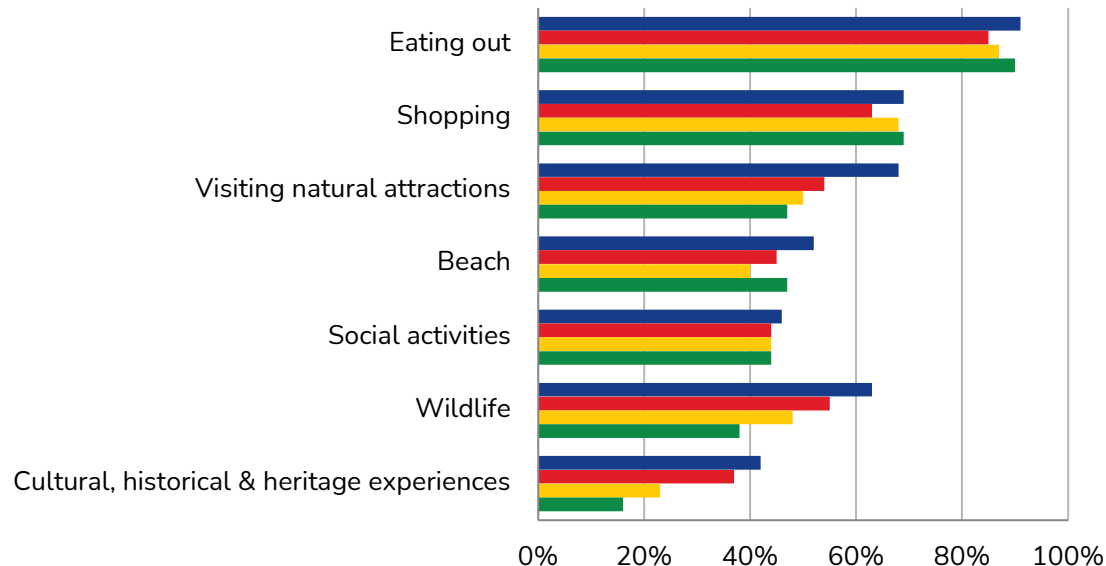
Decision to travel to South Africa made between 4–12 months (pre-covid)



86% prefer to buy travel products unbundled

Top activities in South Africa

2019 2020 2021 2022



Three top places to stay

Hotels



Friends and relatives



Guest houses



Three top information sources



Personal experience

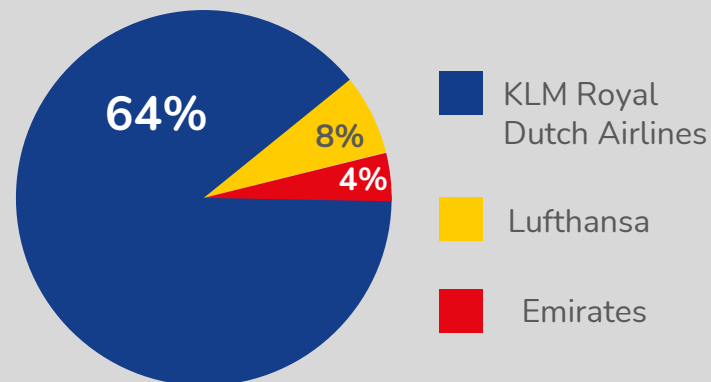


Online travel aggregators



Friends and relations in South Africa

Three preferred airlines



More on the Dutch traveller to South Africa



Spending

Average spend per trip:

Global
R12 600

South Africa
R25 000

Tend to stay
longer in
South Africa



Accommodation
R13 200



Food
R7 300



Leisure products
R5 700



How they view South Africa



Positives

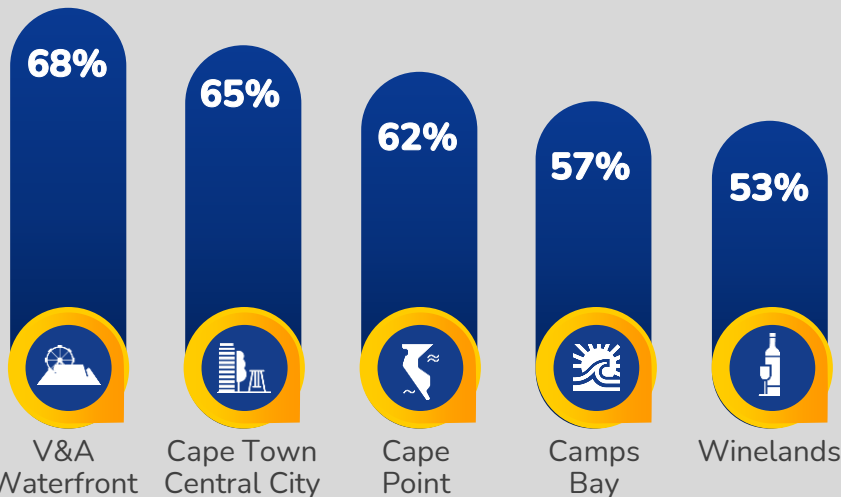
- Wildlife experience
- Beautiful scenery
- Very authentic travel experience



Negatives

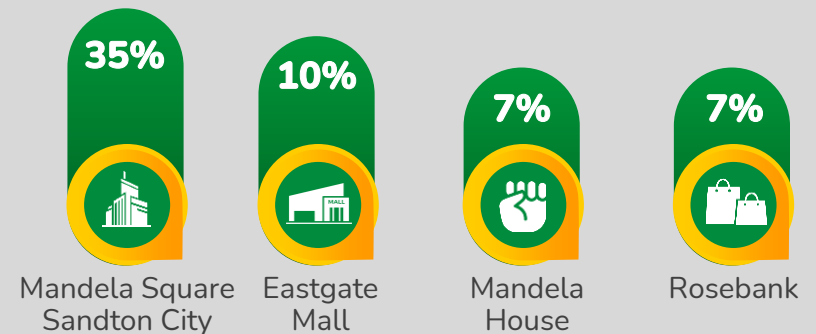
- Lack of safety and security
- Not easy to get around
- Lack of wellness-retreat and relaxation experiences
- Not a year-round travel destination
- Lack of beach experiences
- Lack of variety in available experiences

Western Cape



Where do they go?

Gauteng



Opportunities that would speak to the Dutch market



Many world-class beaches



Top chefs and food experiences



Opportunities to break away from routine



Historical and cultural experiences



Less crowded places



Sustainable travel options