

# The Netherlands - Travel & Tourism: A technology driven market with high rewards (Strategy, Performance and Risk Analysis)

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## Abstracts

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### SUMMARY

In 2016, domestic tourism witnessed stagnation in the Netherlands due to bad climatic conditions (heavy downpours of rain). However, international departures and the number of arrivals to the country witnessed very positive development; improved economic conditions both in the Netherlands and internationally supported the growth of international departures and arrivals in the country. The majority of tourist arrivals came from its neighbouring countries, Germany and Belgium.

The Netherlands has equipped accommodation facilities to cater to large numbers of leisure and business tourists traveling in the country. The luxury accommodation segment recorded the largest share in terms of revenue compared with midscale and economy accommodations. The number of hotel establishments increased at a CAGR of 2.3%, from 3,184 in 2012 to 3,445 in 2016, and is expected to increase at a CAGR of 3.2% over 2017-21 to reach 3,994 in 2021. Luxury accommodation contributed the largest share to the overall growth of the hotels market during the review period.

MarketLine Premium's industry reports provide a comprehensive market view including sections on: risk and reward, key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, industry innovation, deals and key developments.

## KEY HIGHLIGHTS

Online channels are a key driver of growth for travel intermediaries

Revenue from online channels increased at a CAGR of 6.4%, from US\$2,440.1 million in 2012 to US\$3,131.2 million in 2016, and is forecast to increase at a CAGR of 15.6%, from US\$3,585.5 million in 2017 to US\$6,409.9 million in 2021. As the Netherlands has the highest proportion of households with access to the internet in Europe, the Dutch tend to book transport and accommodation two to six months in advance, primarily using the internet to find information and make online bookings.

Domestic and international trips to drive tourist volumes

The total tourist volume increased at a CAGR of 1.7%, from 48.4 million in 2012 to 51.7 million in 2016, and is further forecast to increase at 4.1% CAGR, from 53.2 million in 2017 to 62.5 million in 2021. Growth was predominantly due to increasing numbers of tourists from international arrivals and departures for leisure activities. The country's international departures increased at a CAGR of 7.3%, from 11.7 million in 2012 to 15.5 million in 2016, and are further forecast to increase at a CAGR of 7.3%, from 16.1 million in 2017 to 21.3 million in 2021.

Rise in inbound tourism and government initiatives to foster revenue growth

Total revenue of passenger airlines increased at a CAGR of 2.6%, from US\$14.6 billion in 2012 to US\$16.2 billion in 2016. This trend is expected to continue over the forecast period, with revenue increasing at a CAGR of 9.8%, from US\$17.8 billion in 2017 to US\$25.9 billion in 2021. Though increased traffic at Schiphol airport supports the growth of airlines in the Netherlands, the government's push to develop other airports, such as Eindhoven and Lelystad, is also set to drive traffic.

## SCOPE

**Risk & Reward Index** - This compares the position of the Dutch travel and tourism industry with regards to other countries in the region in terms of specific risk and reward parameters.

**Industry Snapshot and Industry View** - Key travel and tourism industry statistics, including total revenue and expenditure for key industry segments, a summary of key industry statistics, and the trends driving market performance in the Dutch

travel and tourism market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Dutch travel and tourism market.

Industry Benchmarking - Benchmark how the Dutch travel and tourism market is performing compared to regional and global markets in terms of car rental fleet size, car rental revenue, number of hotels, hotel revenue, passenger airline revenue, seats available and seats sold, revenue of travel intermediaries and tourism expenditure growth.

Competitive Landscape - Overview of relevant players in the Dutch travel and tourism industry such as airlines, hotels and car rental companies, with each player in the relevant category compared with its peers in terms of relevant industry indicators.

## **REASONS TO BUY**

How is the market performing in terms of indicators such as total tourist visits, passenger airline seats sold, seats sold by purpose of visit such as leisure, revenue, room nights available, room nights occupied, hotel revenue, car rental days among others.

How risky is it to invest in the Dutch travel and tourism industry compared to other countries in Europe?

What is driving the performance of key industry segments such as passenger airlines, accommodation and car rentals?

Who are the leading players in the Dutch travel and tourism industry and their overview and product portfolio?

What trends are being witnessed within the Dutch travel and tourism industry?

What are the Dutch travel and tourism industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the Dutch travel and tourism industry?

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