

New Landscape Report

THE NETHERLANDS



TRAVEL
SOUTH
USA

EXECUTIVE SUMMARY

- The Netherlands represents a market of 17,5 million people (expected growth to 18,1 million in 2030 – of which 25% is older than 60). 81% is vacationing at least once a year. Aging of the population offers potential for shoulder season travel.
- Pre-COVID The Netherlands had 727,229 visitors to the USA (2019).
- The Netherlands has a high % of the population visiting the USA annually. 4 out of 100 visit the USA yearly. So, we have a lot of repeating visitors, high potential for 2nd and 3rd time destinations within the USA such as the Travel South area.
- The Dutch receive 8% annual extra salary called ‘vacation payout’. Savings increased up to 42 billion. We have at least 25 vacation days and about 10 public holidays. The average amount of days spent per USA vacation is 18 days. The Dutch prefer to travel the USA by car or RV.
- On March the 17th the Netherlands held elections. VVD, a liberal party is again the largest, enabling Mark Rutte to be the Prime Minister again. He is serving for 10,5 years now, fair chance he will be the longest operating prime minister leading the new government (record is at nearly 12 years-Ruud Lubbers). This result marks the desire for solid leadership and economic recovery.
- Vaccination program for COVID is in full progress. They started with elderly people and health care employees. As per mid-March 1,865,547 (10% of the population) is vaccinated. They expect to have the total population vaccinated by the end of June. Polls show that 76% of the population is positive about vaccination.
- Measures are still strict with a curfew, keeping social distance, wearing face masks and closure of a lot of facilities such as restaurants, gyms, day care and restricted opening hours and number of people in shops.
- Good news is that the Dutch experience a travel hunger for 2021 and 2022– Research conducted by Dynata and Transavia among the Dutch shows that many are experiencing a so-called travel hunger. Traveling abroad is higher on the bucket list than going out to restaurants and bars again. 41% of the respondents have the intention of catching up on all missed travels and 19% prefers to travel to nature when the borders open up again.

EXECUTIVE SUMMARY cont...

- The Travel Trade chose education during the pandemic. During the pandemic travel agents have resorted to educating themselves. Job and education platforms Reiswerk, Travel College and TravEcademy showed data where the number of users and learning activity has tripled since March of 2020.
- In March it has been a year since the tour operators started handing out vouchers for non-consumed travel. It was said on these vouchers that people could claim their money back after a year. This would mean a huge cash flow problem for many tour operators. Therefore the government has set up a voucher fund, together with the travel trade. This is a credit facility, a loan. This means the tour operator can refund the customer. The loan has to be paid back to the government.

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Factors Affecting Travel

ECONOMIC OUTLOOK



Producer confidence industry

In recent years, the confidence of industrial entrepreneurs has been relatively high. In 2018 the highest value was measured, since the measurement started in 1985. The confidence remained positive till the outbreak of COVID-19 in April 2020 when it deteriorated dramatically as you can see in the below data (table a). Not only was it the biggest drop on the record, but also the confidence was at the lowest level ever. From May onwards, the confidence bounced back (little by little). The recovery stalled in October 2020, after that it continued to grow again. The economy is very healthy and because of this the government could set in a large program of support, helping companies with salary payments and support for fixed costs. Since vaccinations started, the confidence grew further.

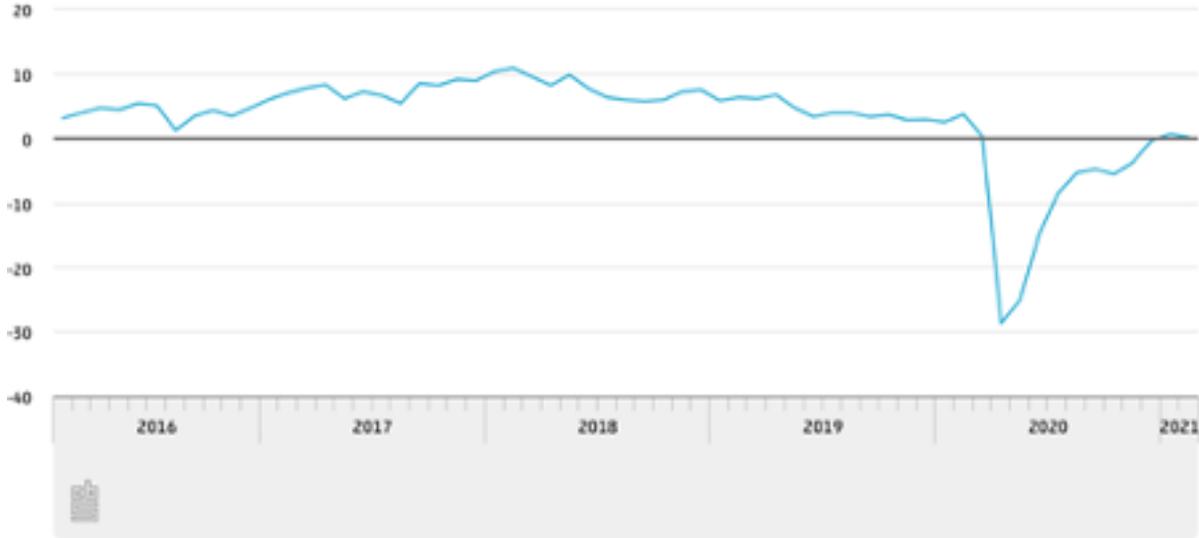


Figure a: Producer confidence industry (Central Bureau of Statistics, 2021).

ECONOMIC OUTLOOK cont...

Consumer confidence is growing

Ever since March the consumer confidence is getting slightly more positive. Also, the willingness to purchase goods is increasing. If we compare it with other years with the CBS-index (*Central Bureau of Statistics*) the consumer trust showed the highest index in the year 2000, +36. The lowest index was measured in 2013, -41. Now the CBS-index ranks -18.

Data & Growth

	2015	2016	2017	2018	2019
Population (million)	17	17,1	17,2	17,3	17,4
GDP per capita (USD)	45,175	46,007	48,675	53,004	52,331
GDP (USD, billions)	765	784	834	914	907
Economic Growth (GDP, annual, in %)	2	2,2	2.9	2.4	1,7

Figure b: Economic statistics (*The World Bank Group, 2021*)

The rate at which the economy grows, is at an average of 2%. With the current situation it was estimated that the economy decreased with an estimate of 5,4% in 2020. However, we foresee a quick recovery, for 2021 its estimated that the economy will expand by 4% (*Statista, 2021*).

Economy party rebounded

The Gross Domestic Product (GDP) shrank by 0,1% in the fourth quarter of 2020 (compared to the previous quarter). But this shrinkage followed after an increase of 7,8% in the third quarter of 2020. So, the economy has partly recovered since the economy shrank by 8,5% in the second quarter of 2020. This was the biggest shrinkage since the measurement started. However, so far it seems that the impact of COVID-19 is smaller in the Netherlands compared to many other European countries. The GDP was, in the third quarter, 3% below the level at the end of 2019 and the GDP of the European Union was 4% below this level.

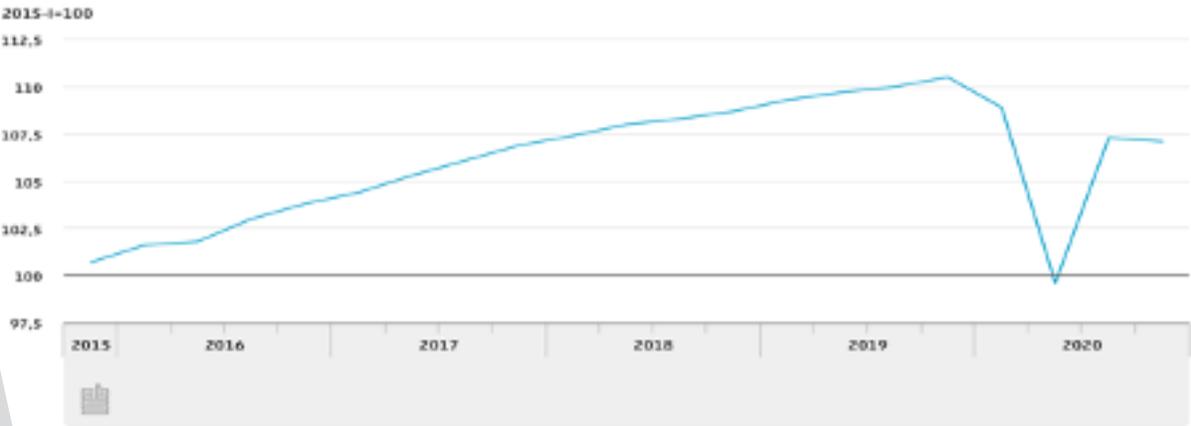


Figure c: Gross Domestic Product (*Central Bureau of Statistics, 2021*).

ECONOMIC OUTLOOK cont...

Lesser bankruptcies

In the first and second quarter of 2020, the number of bankruptcies was comparable to 2019. Since week 28, the total number of bankruptcies has varied. Up to week 52, a total number of 3.180 companies/institutions went bankrupt, which is 605 less than the same period in 2019. And in the first 10 weeks of 2021, 382 companies/institutions went bankrupt, which is 342 less than in 2020. The fact that there are lesser bankruptcies than previous periods mostly has to do with the fact that the Dutch Government has agreed upon various financial support packages for various industries such as the catering and tourism industry. Hopefully this will help most of the companies out, till the end of COVID-19.

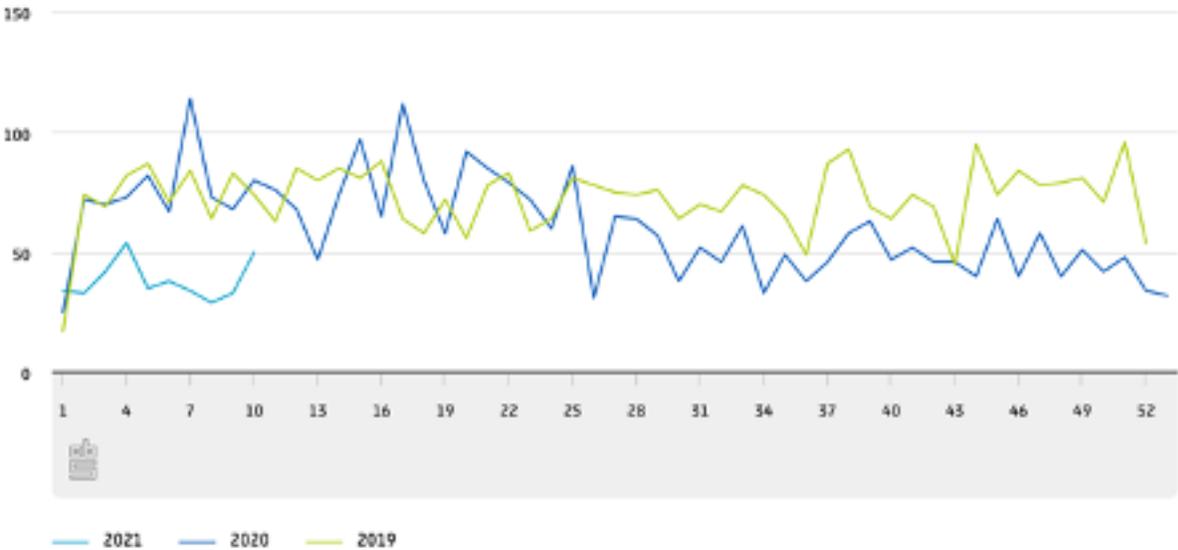


Figure d: Number of bankruptcies of companies/institutions, per week (Central Bureau of Statistics, 2021).

INCOME, SPENDING & SAVINGS

As a result of the crisis, it can be seen that the Dutch people are more cautious when spending money (see figure e) and instead have saved more of their disposable income. In previous years the saving ratio has been consistent (see figure f). However, in the second quarter of 2020, there is a spike of 35%, compared to an average of 26% in previous second quarters (see figure f).

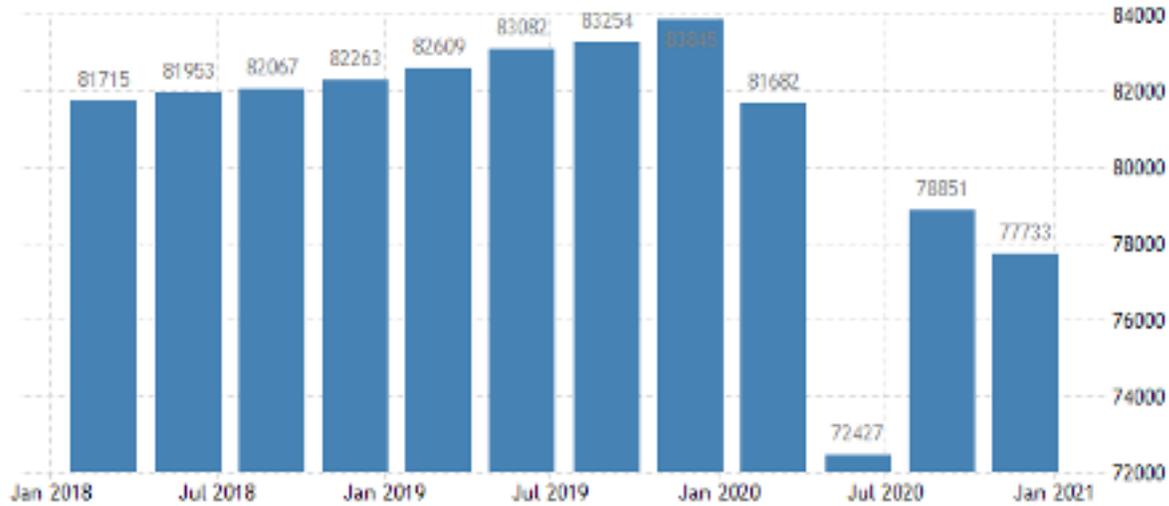


Figure e: Netherland's consumers spending (TradingEconomics.com, 2021)

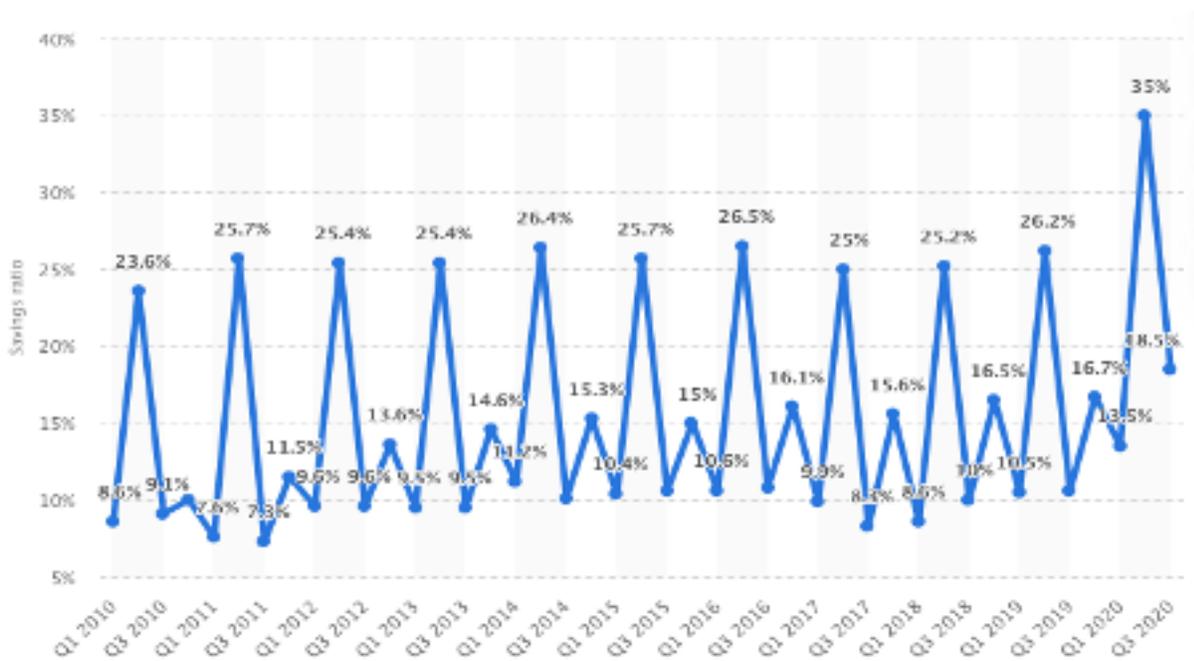


Figure f: Savings ratio of disposable income of households in the Netherlands from 1st quarter 2010 to 3rd quarter 2020 (Statista, 2021)

RESTRICTIONS ON SOCIETY

The figure below shows the new confirmed COVID-19 cases per day, for the Netherlands. It clearly shows after a relative Covid-low summer we had another peak in fall. The first 'wave' was back in March and April. In March the number of hospital admissions were extremely high, which resulted in drastic measures. As the graph shows it worked well to keep the daily cases to a minimum of no more than 150 a day, over the course of May and June. In fall, fortunately, the rate of hospital admissions wasn't as high as the first wave, but it brought enough concerns for more drastic measures, which have been ongoing ever since.

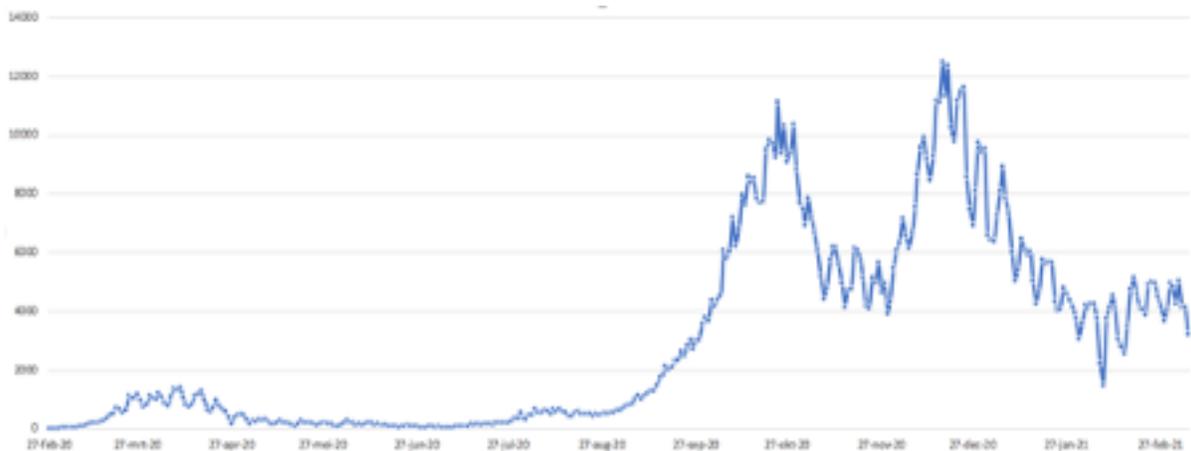


Figure g: Daily COVID-19 cases in the Netherlands

Currently, as of March 2021, we have the following restrictions in place:

- Keep 1,5 meters distance.
- In public building, public transportation & crowded places outside, it is mandatory to wear a facemask.
- There is a curfew between 9 pm and 4.30 am.
- You can only receive 1 visitor per day at your house.
- Where possible, people are requested to work from home, to eliminate travel.
- In addition, travel abroad is not allowed, only when it's an essential trip (e.g., family situation).

RESTRICTIONS ON TRAVEL

Already since November 3rd, 2020 the Dutch government urges to restrain from traveling abroad, unless it's essential. This measure will be in place until at least April 15th, 2021 but will likely be extended as seen fit.

From December 19th, 2020 its required to have a negative PCR-test result (no older than 72 hours) PLUS a negative quick-test result (no older than 24 hours). When returning to the Netherlands, one must self-quarantine for 10 days.

The Dutch travel trade has set up a large lobby to enable travel as soon as possible. Ads with “Booking a trip never killed someone”, and in election time “vote for the Party for Vacations” and discussions with the government about a European Vaccination Passport and travel corridors between countries. The percentage of vaccinated people will have a huge impact on the travel possibilities. Therefore, we foresee more travel options after June.

VACCINATION POLICY, ROLL-OUT & DIGITAL VACCINE CERTIFICATE

To start, currently more than 1,4 million people have received at least 1 vaccine, and almost 500.000 people have received a second vaccine. Meaning that almost 10% of the population is completely, or partially, protected.

The Netherlands started vaccinating in early January. First in line were the healthcare workers, most of whom have all been vaccinated by now. On January 18, 2021, the first people who do not work in healthcare were sent an invitation. There is a strategy in place, however this is not set-in stone. It is dependent on when vaccines are delivered.

An example from March 14th, the government decided to temporarily pause the use of the AstraZeneca vaccine, due to some concerning side effects that were registered. They will now conduct further research if it was related to the vaccine and will otherwise continue using the AstraZeneca vaccine.

VACCINATION POLICY, ROLL-OUT & DIGITAL VACCINE CERTIFICATE cont...

Right now, the vaccination strategy goes as follows:

Who	When	Which vaccine	Where/by whom
Nursing home residents and residents of care homes for people with intellectual disabilities	From 18 January	BioNTech/Pfizer	In-house doctor
People living in small-scale residential homes and residential care homes for people with intellectual disabilities	From late January	BioNTech/Pfizer or Moderna	Family doctor or out-of-hours GP service
People aged 65 and over who live at home and can travel to the vaccination center (from oldest to youngest in 5-year age groups)*	From late January	BioNTech/Pfizer, Moderna or AstraZeneca	GGD vaccination center (page in Dutch)
People aged 60-64 who live at home and can travel to their doctor's office (from oldest to youngest)	From mid-February	AstraZeneca	Family doctor
Mental healthcare inpatients	From late February	Moderna or AstraZeneca	In-house doctor
People aged 65 and over who live at home and are unable to travel to a vaccination center or their doctor's office (from oldest to youngest in 5-year age groups)	From March	BioNTech/Pfizer, Moderna or AstraZeneca	Family doctor
People aged 18 and over in medically high-risk groups	From March	BioNTech/Pfizer, Moderna or AstraZeneca	Medical specialist Family doctor
People aged 18-59 in other medically at-risk groups	From May	AstraZeneca	Medical specialist Family doctor
Residents of St Eustatius and Saba (all groups)	From mid-February	Moderna	Local public health services
Residents of Bonaire, Curaçao, Aruba and St Maarten aged 60 and over*	From mid-February	BioNTech/Pfizer	Local public health services
Residents of Bonaire, Curaçao, Aruba and St Maarten aged 18-59*	From May	BioNTech/Pfizer, Moderna AstraZeneca	Local public health services
People aged 50-59, followed by those aged 18-49 who do not have certain medical conditions	From May	AstraZeneca	GGD vaccination center (page in Dutch)/ family doctor

Figure h: Vaccine roadmap

VACCINATION POLICY, ROLL-OUT & DIGITAL VACCINE CERTIFICATE cont...

Good to know, 76% of the Dutch population is willing to get vaccinated. This percentage is higher under the older age groups, but even for the younger people (ages 16-54) the willingness to get vaccinated is about 50%.

Vaccination passport

There have been ideas and plans for a vaccination passport, however no concrete plan or product is in place. It is expected that something will have been created before summer 2021, to allow travel within Europe.

PUBLIC SENTIMENT

Good news is that the Dutch experience a travel hunger for 2021 and 2022– Research conducted by Dynata and Transavia among the Dutch shows that many are experiencing a so-called travel hunger. Traveling abroad is higher on the bucket list than going out to restaurants and bars again. 41% of the respondents have the intention of catching up on all missed travels and 19% prefers to travel to nature when the borders open up again.

IMPACT OF COVID-19 PANDEMIC ON AVIATION

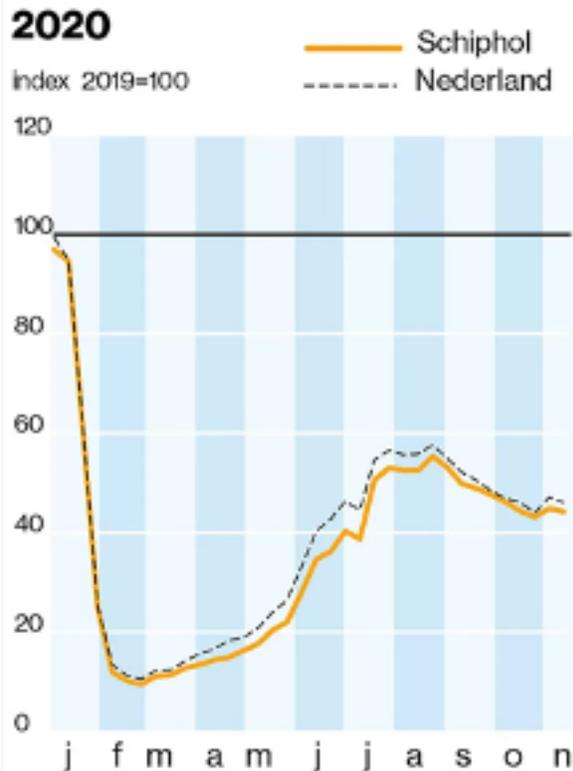


Figure i: Impact of the pandemic on Schiphol and its road to recovery

As it is worldwide, the impact on aviation is huge in the Netherlands. The only possibility for passenger flights is the Dutch Antilles. The number of flights decreased with 60%, while the number of passengers decreased 82%. Freight has a slight positive impact on the number of flights.

Over 100 years KLM is the flag carrier airline of the Netherlands. It is the oldest airline worldwide still operating under its original name. It was a very healthy airline, scheduling passenger and cargo services to 145 destinations, employing 35,000 people and a fleet of 119 airplanes. The government is supporting KLM with 3,4 billion euro, consisting of loans, guaranteed by the government. KLM is considered to be an essential part of the infrastructure of the Netherlands and cannot be missed in our open economy.

From Amsterdam numerous flights departed daily to the Travel South Region. KLM/Delta with 28 times per week to Atlanta, 7 times to Houston, 7 times to Orlando, 7 times to Tampa and 7 times to Washington, United 7 times weekly to Houston (as well a gateway to the TS region) and American Airlines 7 times weekly to Dallas/Fort Worth. More and more we are getting news that they are planning to restart schedules again.

Amsterdam/Schiphol is a major airport. Schiphol also suffered a major loss of 563 million in 2020. In 2020 20.9 million people / 227,304 flight movements travelled from and through Schiphol, a decrease of 71%. Schiphol ranks number 14 worldwide in airport.

DUTCH TRAVELER PROFILE & PREFERENCES

Types of travelers

At the beginning of the COVID-19 pandemic Tourisme Veluwe Arnhem Nijmegen (2020) published an analysis presenting: whom of the Dutch inhabitants will continue to travel in times of COVID-19. For this they used the Brand Strategy Research (BSR) model, which segments the population based on lifestyles (see figure j). The model (left) displays two axes. The sociological axis runs from 'ego' to 'group' and the psychological axis runs from 'extravert' to 'introvert'. These create four segments, representing four core values: **Freedom**, **Harmony**, **Control**, **Safety**.

Next the model uses the core values to define where the seven lifestyles are placed in the graph (right).

- (1) Adventure-seeker
- (2) Pleasure-seeker
- (3) Insight-seeker
- (4) Style-seeker
- (5) Harmony-seeker
- (6) Connection-seeker
- (7) Peace-seeker

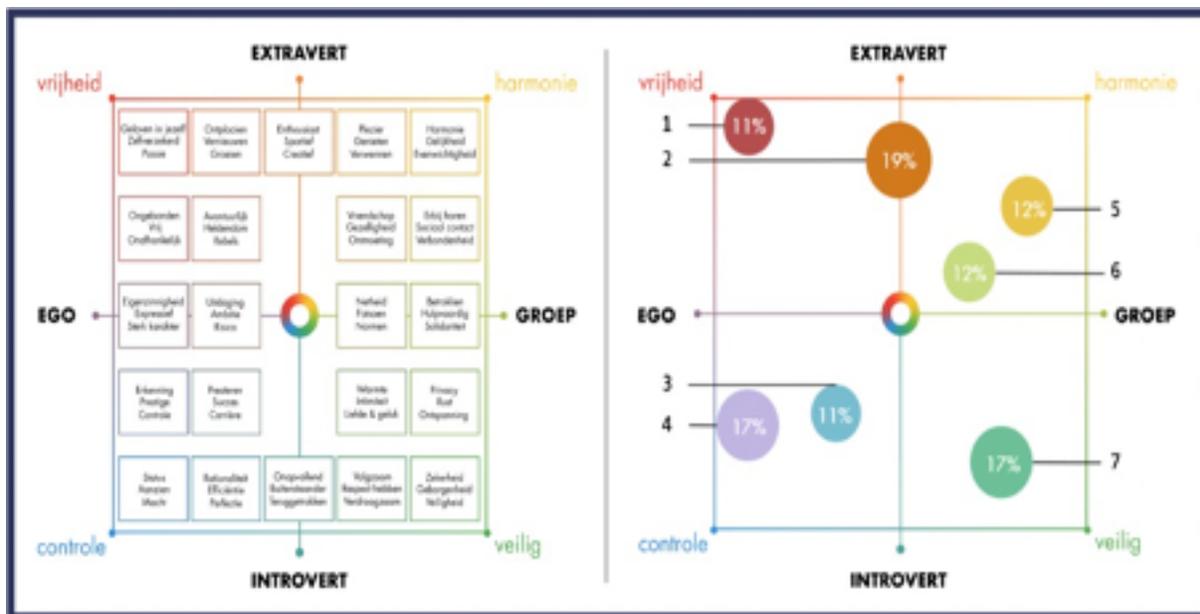


Figure j: Brand Strategy Research (BSR) model

DUTCH TRAVELER PROFILE & PREFERENCES cont...

Their research concluded that people who stand the furthest away from the core value safety, will be the first to travel again once bans are lifted. Meaning that the adventure-seeker will be first, closely followed by the pleasure-seeker & style-seeker. Depending on how the situation changes, more lifestyles will join or take step.

These three lifestyle groups cover almost 50% of the total population. The majority of people within these lifestyles are aged between 18-49 years old and have an above average income.

Adventure-seeker (11%)

They are adventurous and are looking for authentic experiences while travelling. They love doing activities in nature, visit a museum to learn about the local culture or take part in a course to learn something new. Personal development is key!

Pleasure-seeker (19%)

Festivals, party, on the move with friends, going to the movies; they like to have fun! Spending time with friend and family is the most important thing when on a holiday or in their free time. Holidays they would like are beach holidays, party holidays or adventurous holidays. Having fun is key.

Style-seeker (17%)

“Work hard, play hard.” These people are active and driven to perform well. When on holiday they want to completely unwind and treat themselves with some luxury and comfort.

DUTCH TRAVELER PROFILE & PREFERENCES cont...

Purchase Behavior

The Dutch are very internet savvy. In 2019, 79% of the Dutch, 12 years and older, did a purchase on the Internet. In 2015 this was 70%. Especially 25-45-year-olds buy easily on the internet. However, the biggest growth was shown among people aged 65 years and older. In 2019 63% of them bought online, while 4 years before this was only 45%. 30% of the 75 years and older bought online, this was only 17% in 2015. **Travel is among the higher ranked purchases with 52%** (CBS, 2020).

NOTE:

55% = Clothing and sport related accessories

52% = Travel and accommodation

47% = Tickets for events

38% = Household and appliances

31% = Foodstuffs, cosmetics or cleaning supplies

31% = Books, magazines, newspaper

30% = Soft-/hardware, electronics

17% = Movies and music

9% = Medication

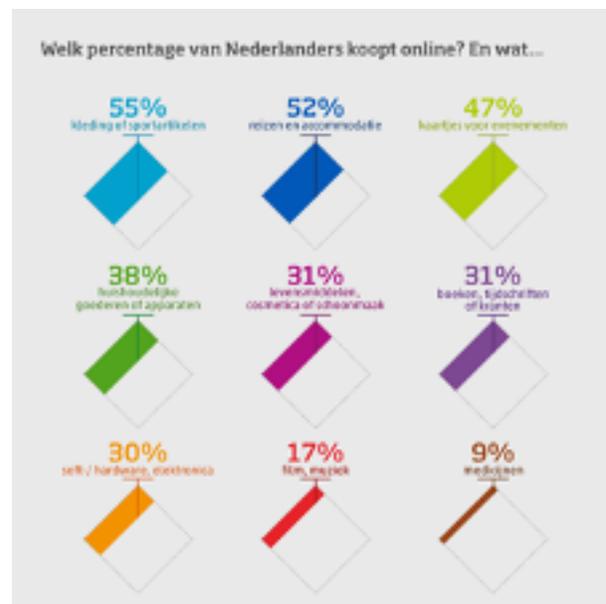


Figure k: What do the Dutch buy online?



Travel Industry Landscape

In the first six months of 2020, the tourism sector was approximately 45% lower than in the same period in 2019. In 2019 the tourism sector contributed 32 billion euros and 813 thousand jobs to the economy. There are a lot of industries depending on tourism, aviation, accommodation, food services, travel services, culture, recreation and sports (CBS, 2020).

The COVID pandemic showed the vulnerability of the industry. A lot of people working in the industry are convinced tourism will get back on its feet, but we will think more about the dependence on tourism, sustainability and overcrowded places. Safety and travel will be a hot item too. More than ever people are aware of the health risks of traveling (WUR, 2021)

This reflects in a move in the product portfolio of tour operators offering more off the beaten path, more nature destinations and less crowded areas.

STATUS OF TOUR OPERATORS & AGENCIES

For the outbound tourism industry, focusing on the USA, The Netherlands have a lot of specialized tour operators. Up and until 2019 there were over 300 tour operators of which 70 tour operators were offering the USA in their portfolio. Besides that, there are a few wholesalers, big tour operators such as TUI, Corendon, Sunweb and ANWB.

The number of travel agencies decreased over the years, from over 2,000 there are momentarily 900 travel agencies left. The number of home-based agents increased over the years to over 1,000, but they have been hit the hardest by the crisis. Travel organizations can join ANVR, the association for the Dutch Travel Industry.

Biggest shifts among the specialized tour operators have been the takeover of GoAmerika.nl by Style in Travel, the bankruptcy of Tenzing Travel and the set-up of a USA product of Little America and of Worldwide Travel.

So far Tenzing Travel has been the only tour operator facing bankruptcy so far. This is mainly thanks to the government support and the voucher fund. Another development is the vertical organizations offering the whole product. KLM and Transavia lined up with OTA and consolidator Airtrade to sell packages via the airlines.

All tour operators are selling through the internet and most of the specialized tour operators offer tailor made moduled packages. Expectation is that a major part of the tour operators will survive as they have low costs and that the tour operator landscape will not change dramatically.

PRODUCT UPDATE

There will be a fully updates product survey ready beginning of May. This is a major project, so we already started it. What we see so far is little change compared to last year. Most tour operators are consolidating the product and tours only show little changes. There are no new brochures printed and everybody extended the validity of the product.

The 51 tour operators offering product to the Travel South Region is a solid and experienced group of tour operators, knowing the area and ready to “go” if travel is possible again. Most of the tours are individual tours, fly-drives and RV trips.

As stated, we do expect a move to more sustainable travel, off the beaten path and avoiding busy places. Safety and healthy circumstances are important and should be shown in marketing. Also, we expect a positive contribution of the new players in the market, Little America and Worldwide Travel.

This was the situation in 2020 and we expect little change in the product survey of 2021.

2020

State	Tour Operator	Difference previous year
*Alabama	19	+8
*Tennessee	67	+1
*West Virginia	4	+1
*Kentucky	8	+4
*Louisiana	64	0
*South Carolina	42	+2
*North Carolina	41	+3
Missouri	36	+24
Mississippi	63	+2
Arkansas	1	0
Virginia	42	+2
Georgia	57	+3

The expectation is that the positive growth and interest for the Travel South Region will further continue as this region fits perfectly in the requirements future travelers have on their vacation destination. No crowded cities, nature and loads of possibilities for outdoor activities and to go off the beaten path.

PRODUCT UPDATE cont...

Travel to the South TO List, status 2020 new product survey ready May 2021

Tour Operator in the Netherlands	AL	KY	LA	MO	NC	SC	TN	WV	MS	AR	GA	VA
333 Travel			X	X		X	X		X	X	X	
Aeroglobe/Amerikaplus.nl	X		X	X	X	X	X		X		X	X
America Travel Guide	X		X	X	X	X	X		X		X	
American Tours	X	X	X	X	X	X	X	X	X		X	X
American Vacation	X	X	X	X		X	X		X		X	X
Amerika Online / Riksja Travel Amerika			X		X	X	X		X		X	
AmerikaNu.nl												
Atlantic Dream Vacations			X	X		X	X		X	X	X	X
Baobab			X		X		X		X			X
Beleef Amerika (Disma)			X	X	X	X	X		X		X	
Best of Travel			X				X		X		X	
De Jong Intra	X		X	X	X	X	X		X		X	X
Discovery/ Intrepid travel												
Djoser			X		X		X		X		X	X
Doets Reizen	X		X	X	X	X	X		X		X	X
DO-USA												
Dream Travels (Style in Travel)			X	X	X	X	X		X		X	X
Eagle Rider	X		X	X	X	X	X	X	X		X	X
Euram	X	X	X	X	X	X	X	X	X		X	
Exit-Reizen	X		X	X	X	X	X		X	X	X	X
Experience Travel (onder ITG)			X				X		X			
Fly to the West (B2B product Tioga)	X		X	X	X	X	X	X	X		X	X
Fox Reizen	X	X			X	X	X					
Go Amerika (Style in Travel)			X	X	X	X	X		X		X	X
Great Lakes Travel			X	X	X		X		X		X	X
Kilroy		X	X		X	X	X				X	X
Kras Stervakantie												
Le Beau Reizen	X		X	X			X		X			
Little America												

PRODUCT UPDATE cont...

Tour Operator in the Netherlands	AL	KY	LA	MO	NC	SC	TN	WV	MS	AR	GA	VA
Motortrails	x		x				x		x			
NRV Reizen			x	x	x	x	x		x		x	x
Op droomreis.nu					x						x	x
Route 66 Reizen	x		x	x	x				x		x	
Sawadee	x		x				x		x		x	x
Senses Travel			x				x		x			
SNP Natuurreizen			x		x		x		x			
Tenzing Travel												
Tioga Tours	x		x	x	x	x	x	x	x		x	x
Travel Experience	x		x		x	x	x		x		x	x
Travel Trend			x	x	x	x	x		x		x	x
Travel2America	x	x	x				x		x		x	
Travelhome			x				x		x		x	
Travelnauts												
Travelworld			x			x	x		x		x	
Travel Worldwide												
Trek America		x	x			x	x	x	x		x	x
TUI	x		x	x	x	x	x		x		x	
Untamed Travelling												
US Bikers			x	x	x						x	
US travel	x		x	x	x	x	x		x		x	x
USA Fietstours												
USA Motorreizen	x		x	x			x		x			
Van Verre Reizen												
WRC / Outsight Travel												
Yellow is new, to be added in PS21												
Total 51 TO's (3 (red)/54 not operating anymore) -> Tour operators per state:	21	7	40	25	28	26	39	6	38	3	34	23

FUTURE TRAVEL TRENDS

Up until March of 2020 the Dutch market was showing positive figures. The economy was doing very well, and the consumer trust was high. Travel participation remained high, around 75% traveled abroad for their vacation, with an average of 3 vacations per year. To decide on destination, type of vacation etc. almost 90% researched online, where personal stories such as blogs and reviews were more and more important. Bookings were predominantly made online, 10-20% reached out to a travel agent. When consumers book their own flights, car and accommodation, 40% books 3-6 months ahead. Parties, such as Airbnb were increasing in popularity.

Although the Dutch travel trade is going through a difficult time after that, Dutch research showed that consumer trust is recovering more quickly than we were expecting.

The USA was the number one long haul destination for vacations. With 729,000 visitors from the Netherlands traveling to the USA in 2019, the Netherlands was the 6th biggest European market, after UK, Germany, France, Italy and Spain. From the Netherlands 4 on every 100 inhabitants travel to the US, which was the second highest percentage after the UK. We expect it will take some time to recover Dutch tourism to the USA, depending on the current developments.

FUTURE TRAVEL TRENDS cont...

Trends

- **Video content is fastest growing advertising tool.** Travelers want to experience their destination of choice while still in the inspiration phase. In this search for video people tend to trust user-generated content more than the content from companies. Research from Cisco predicts in 2021 over 82% of all internet traffic will be video content. The average time per day in the Netherlands spent on watching online videos was 48 minutes (while this was 38 minutes in 2017).
 - Most of the states provide video content, which we can share on social media. In future, we can use more user-generated content to create the trustworthy content travelers are looking for.
- **Steady increase in online purchases by all age groups.** In 2018 52% of all payments and bank transfers were done by mobile phone. 69% of the Millennials age group (21 – 35) and 45% of the Generation X (36 – 55) use online banking on their smart phone. 53% of the Millennials and 28% of the Generation X make purchases online via smart phone. And do not forget the online behavior of the baby boomers (56– 71) because 67% of them watch video's online.
 - People do research and purchase their holidays online more often. Travel South can enhance the online visibility and findability to enhance SEO results.
- **Contact with locals adds to the travel experience.** To make traveling more authentic the Dutch are looking for platforms, accommodations and activities to get in contact with the locals during their trip. “Everybody knows Airbnb, but we are way beyond just staying over in a local's house.” Travelers want to hike and bike with locals or get a city tour from a local. Travelers want to hear more about the local culture and get a more in-depth introduction into the destination instead of seeing the most traveled highlights.
 - We can promote more local activities and travel tips from the locals.
- **More interest in hike and bike holidays in nature.** Guided holidays focused on hiking or biking trails are getting more popular. This type of holiday adds to healthy and sustainable travel trend, while enjoying nature to its fullest. 1.5 million (which is 9% of the Dutch population) have been on a specialized biking holiday.
 - We can promote more hike and bike trails or create brand awareness with tour operators who offer hike and bike holidays in the Travel South Region.
- **Increase in ‘detour’ vacations.** More people are traveling by detour route to their final destination, with driving as the main activity. This gives travelers more chances to experience undiscovered areas and locations or skip highlights which are crowded with other tourists.

FUTURE TRAVEL TRENDS cont...

- **Looking for unique hotspots to add to the holiday experience.** To increase the authenticity of their trip Dutch travelers are looking for unique accommodations. They prefer overnights in the middle of nature, in a tree house or in homestays because it adds to their travel story and the storytelling is very important. This will also lead to an even higher increase of individual travel.
 - We can promote more unique accommodations like treehouses, boutique hotels and historic houses.
- **Taking sustainability and over tourism into account.** 61% of Dutch travelers want to protect the environment and not add to over tourism with their own holiday. 36% says they would trade their initial holiday destination to a 'second city or location' which is less popular and has partly the same features (nature / culture) if that means it is less crowded and better for the environment.
 - We can promote the Travel South region as a great alternative for other more touristic nature destinations in the USA and as an (active) outdoor holiday (focus on nature).
- **Safety, health, hygienic measures, social distancing and privacy** are important trends in general that will be main topics when choosing a vacation. Off the beaten path and stays in unique and remote destinations fit in this desire.
- There will also be a **tendency to book late**, to assure themselves the trip can be done and so they wait for the travel advice.

All the trends are being driven by a desire for a safer travel experience. Because people still want (need) to travel, but the new way of travel will be different post COVID. Once the restrictions are lifted, people will go on a holiday. The good news is that the US is seen as a destination that can keep up with these trends and remains the top choice for long-haul travel for the Netherlands.

ROUTE TO MARKET

With a switch to more independent and self-accommodated holidays and far away from large groups, we foresee changes in route to market.

Together with The Dutch Government the ANVR has established the so-called corona voucher. In case of cancellation due to COVID, the travel organizations doesn't has to give a refund to the customer, but a travel voucher. This voucher is/was valid for one year and provides a safety-net for both the customers as the travel organization. Although customers always have the right to ask for a refund of their money (it's even obligated by the Dutch Law when they request this), most organizations are hesitant in refunding the clients' money. Although the Dutch really want to travel, there is a lot of negativity towards the corona voucher. Most Dutch are suffering because of COVID (health or businesswise) and therefor want their money back. Tour Operators and other travel organizations that are flexible with their booking and paying conditions are and will stay an important factor in this matter.

BOOKING FACTORS

As we see today, several related booking factors have emerged. These include:

- Safety of the destination (in terms of being COVID secure)
- Cancellation and refund policies
- Flexibility of booking conditions
- Being able to book at short notice to lessen COVID associated risks
- Safety and hygiene.

Until April 15, the Dutch Government has banned all leisure travel outside the Netherlands. As quoted on the website of the Central Government: “Every trip increases the risk of more infections in the Netherlands and abroad. You may only travel for work that really can’t be postponed (and where physical presence is absolutely necessary.) and for serious family circumstances. We don’t know when you can travel abroad again after April 15. Booking a trip is a huge risk.”

The go to website for all Dutch travelers is: <https://www.nederlandwereldwijd.nl/>

TOUR OPERATOR CANCELLATION POLICIES

Most of the tour operators used the possibility to hand out a voucher for cancelled bookings. Because this was initiated a year ago now, people have the right to ask their money back. For that a voucher fund has been set up together with the government. Tour operators can get a loan to cover costs for refunding vouchers. For future travel most of the tour operators give the opportunity to cancel free of charge or to move to another date if the cancellation is due to travel restrictions.

TUI, the biggest wholesaler is paying all customers back for bookings made since December 2020. Bookings made before this date have received a voucher, valid for one year. They also offer an exchange guarantee, without charges you can rebook your trip to another trip at the same date, or another date, or another destination. If people get COVID during their trip they offer the TUI Covid Care Service 24/7. You can also book a COVID insurance with extra options.

Doets Reizen, one of the bigger specialized tour operators offer the “Doets Duidelijkheid Garantie”. This means simple and almost free cancellation or rebook free of charge if Doets communicates travel restrictions. But if you cancel on your own initiative you have to pay the regular cancellation fees.

GoAmerika is communicating the regular cancellation policy, just like **Tioga Tours** and more specialized tour operators. Like **UStavel** is stating, they know the majority of their clients more personal, they have a lot of repeating clients and they can convince the major part to rebook the trip instead of cancelling.

Travel Trend is communicating that due to travel restriction up and until 30st April there will be no traveling. If you already booked a trip, departing after the 1st May, the regular change- and cancellation policy apply.

KEY INDUSTRY EVENTS

All of the major consumers travel shows across the region that normally take place in Q1 have been cancelled or postponed. All other events in 2021 are still uncertain whether or not they will take place.

- **Travel Congress, online event held on January 14**

Speakers from within and outside the travel industry shared their approaches and innovative concepts regarding marketing & communication strategy, human capital and sustainability in various talk shows and keynotes.

- **Back on the Road- Show in Zwolle on April 15**

In March 2021, Visit USA the Netherlands set up an idea for a top-of-mind, B2B, COVID-19 proof event. Travel South has signed up for this event.

- **De Vakantiebeurs, this spring**

The Vakantiebeurs is normally held in January and is the biggest B2C event for the travel branch. This year it was postponed until this spring. Lately they also cancelled the Spring edition, and they say to have an online event somewhere in June. Details still unknown.

- **Vakantiebeurs voor Bijzonder Reizen 2021 in Amsterdam on September 11 and 12**

This event focusses on special trips, is to create an environment where mass tourism doesn't set the tone, but where a selective choice is made for quality and authenticity.

- **The Roadshows in September**

It's still uncertain whether or not this event will take place this year and if so, in what shape.

The background features abstract geometric shapes. A light grey triangle is in the top-left corner, and a dark red triangle is in the bottom-left corner. The rest of the background is white.

Media & Social Media Landscape

KEY PUBLICATIONS IN NETHERLANDS

AmericA Magazine

AmericA Magazine comes out 4x a year. The target audience are real USA and Canada lovers and their need for inspiration and information didn't stop because of COVID. They distribute 15,000 magazines per quarter and readership can be easily multiplied by 4. It's also a tabletop Magazine. AmericA Magazine also offers online exposure via their website, social media, and newsletter. In the spring edition of 2021 (release date, March 19), there will be an 8-pages article about Louisiana with focusses on the theme Louisiana Byways, a spread about the Sounds of Alabama (in Muscle Shoals) and a 1-page back cover with an advertisement of Louisiana. The articles have been written by Jacob (Jaap) van Splunter.

Travmagazine & TravEcademy

TravEcademy is the largest and longest running b2b e-learning platform in the Netherlands. And the Ecademy about Travel South is live for almost 2 years! And the courses and general pages are visited very well. Currently we are adding new information about the several pages every month, so there will be something new for the travel agent to learn every month. We will also update the Travel South page in general as frequent uploading new content actually contributes to a higher number of completed courses. Up till now almost 2,700 agents did a course and we had over 10,000 views on the platform page.

Visit USA NL

Visit USA Association is an independent non-profit organization dedicated to the promotion of tourism to the United States. The goal is to enthuse as many Dutch people as possible to visit the land of unprecedented possibilities! Also, Visit USA is there to speak to the travel industry, to provide information, and to bring the United States to the attention of travel agents. Target Travel Marketing represents the secretary of Visit USA NL. Visit USA NL regularly posts about the Travel South region.

Meridian Travel

Offering 4 themed magazines a year, The most beautiful roundtrips, undiscovered places, Wildlife and Outdoor. Publication is 10,000 copies. Magazines have no date on the cover so can be sold for a very long time. Normally he sells in shops, but he also has a large platform with a web shop (75,000 members on the platform and 2,000 subscribers to the newsletter). He also makes themed books, such as "The Wild South" and he is now working on "the most beautiful National Parks" I suggested him to add the newest one in West Virginia.