Executive Summary

Key Facts and Trends

This factsheet provides the latest data on the volume and value of visitors from the International Passenger Survey (IPS), as well as recent information on consumer trends and attitudes.

In 2018, the Netherlands was Scotland’s seventh largest international source market measured by total number of trips and total spend.

Visits by Netherlands residents to Scotland increased by 10%, while nights grew even more substantially by 22% from 2017. Despite their longer average length of stay, Dutch visitors spent less money during their trip on average compared to 2017 which resulted in an 8% overall decline in total expenditure in 2018. Still, 2018 was the best year over the last decade in terms of visits and third best in terms of nights and expenditure by travellers from the Netherlands to Scotland.

Contrary to the vast majority of international tourists who prefer to travel to Scotland mostly in the summer, Dutch visitors favour spring trips, with 39% of all visits occurring between April and June. While most Dutch travellers are holidaymakers, 23% visited Scotland on a business trip which is significantly above the average for international visitors. Three out of four Dutch trips to Scotland last less than a week.

Even though visitors from the Netherlands spend considerably less time in Scotland than the average overseas tourist, they tend to explore a lot of what Scotland has to offer. In 2018, the Netherlands ranked first in terms of the average number of regions visited (regional spread) among Scotland’s top ten European markets.
Latest Information
Visitors from the Netherlands to Scotland

Key Figures Overview, 2018

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Key Facts in 2018</th>
<th>% Change 2017/18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total visits to Scotland</td>
<td>172,000</td>
<td>+10%</td>
</tr>
<tr>
<td>Total nights in Scotland</td>
<td>945,000</td>
<td>+22%</td>
</tr>
<tr>
<td>Total spend in Scotland</td>
<td>£85,678,000</td>
<td>-8%</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>5.5 nights</td>
<td>+11%</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£91</td>
<td>-24%</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£498</td>
<td>-16%</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.

Duration of Stay

Seasonality

Purpose of travel

Age

All charts are based on 3-year average data (2016-2018); * VFR = Visiting friends or relatives. Figures may not sum up due to rounding. Source: IPS.
International Tourism Figures
Top 10 Overseas Markets

Visitors from the Netherlands Compared to Other Overseas Markets:
Trips, Nights and Spend – Value and Percent of Total, 2018

<table>
<thead>
<tr>
<th>Country</th>
<th>Trips 000s</th>
<th>%</th>
<th>Spend £m</th>
<th>%</th>
<th>Nights 000s</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>492</td>
<td>14%</td>
<td>438</td>
<td>20%</td>
<td>3,907</td>
<td>16%</td>
</tr>
<tr>
<td>Germany</td>
<td>451</td>
<td>13%</td>
<td>246</td>
<td>11%</td>
<td>2,818</td>
<td>12%</td>
</tr>
<tr>
<td>France</td>
<td>318</td>
<td>9%</td>
<td>209</td>
<td>9%</td>
<td>1,985</td>
<td>8%</td>
</tr>
<tr>
<td>Italy</td>
<td>268</td>
<td>8%</td>
<td>110</td>
<td>5%</td>
<td>1,220</td>
<td>5%</td>
</tr>
<tr>
<td>Spain</td>
<td>205</td>
<td>6%</td>
<td>79</td>
<td>4%</td>
<td>1,192</td>
<td>5%</td>
</tr>
<tr>
<td>Australia</td>
<td>172</td>
<td>5%</td>
<td>153</td>
<td>7%</td>
<td>1,801</td>
<td>7%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>172</td>
<td>5%</td>
<td>86</td>
<td>4%</td>
<td>945</td>
<td>4%</td>
</tr>
<tr>
<td>Canada</td>
<td>131</td>
<td>4%</td>
<td>117</td>
<td>5%</td>
<td>1,269</td>
<td>5%</td>
</tr>
<tr>
<td>Sweden</td>
<td>121</td>
<td>3%</td>
<td>74</td>
<td>3%</td>
<td>605</td>
<td>2%</td>
</tr>
<tr>
<td>Norway</td>
<td>106</td>
<td>3%</td>
<td>40</td>
<td>2%</td>
<td>338</td>
<td>1%</td>
</tr>
<tr>
<td>Rest of World</td>
<td>1,102</td>
<td>31%</td>
<td>653</td>
<td>30%</td>
<td>8,158</td>
<td>34%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>3,538</strong></td>
<td><strong>100%</strong></td>
<td><strong>2,206</strong></td>
<td><strong>100%</strong></td>
<td><strong>24,237</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Source: IPS, 2018. Figures may not sum up due to rounding.
Inbound Tourism | UK & Scotland
Visitors from the Netherlands

<table>
<thead>
<tr>
<th>Key Facts in 2018</th>
<th>UK</th>
<th>Scotland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total visits</td>
<td>1,954,000</td>
<td>172,000</td>
</tr>
<tr>
<td>Visits by purpose*</td>
<td>39% Holiday</td>
<td>56% Holiday</td>
</tr>
<tr>
<td></td>
<td>30% Business</td>
<td>23% Business</td>
</tr>
<tr>
<td></td>
<td>25% VFR</td>
<td>20% VFR</td>
</tr>
<tr>
<td></td>
<td>6% Other</td>
<td>1% Other</td>
</tr>
<tr>
<td>Total nights</td>
<td>8,547,000</td>
<td>945,000</td>
</tr>
<tr>
<td>Total spend</td>
<td>£715,426,000</td>
<td>£85,678,000</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>4.4 nights</td>
<td>5.5 nights</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£84</td>
<td>£91</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£366</td>
<td>£498</td>
</tr>
</tbody>
</table>

Source: IPS. Figures may not sum up due to rounding.
*3-year average (2016-2018).

2018 marked a decline in performance of travellers from the Netherlands to the UK. The number of visitors decreased by 9%, while the total number of nights dropped by 10% from 2017. An increase in average spend per visit meant that total expenditure had a more moderate decline of 4%.

Figures indicate a different trend in Scotland, where total visits increased by 15,000 (+10%) and total nights rose by 169,000 (+22%) in 2018. The increase in Dutch visitors could not offset the £95 decrease in their average spend per trip, resulting in a total expenditure drop of £7.4m (-8%) from 2017. While going on a holiday is the most popular reason to travel to Scotland, the Netherlands has the second highest proportion of business trips among Scotland’s top ten international markets (nearly one out of four visits).

In 2018, the Netherlands became Scotland’s seventh largest international source market in terms of visits (from fifth largest in 2017) due to massive increases in trips from Italy and Spain.

In 2018, the Netherlands was

<table>
<thead>
<tr>
<th>The UK’s</th>
<th>Scotland’s</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 6th largest source market measured by number of visits</td>
<td>• 7th largest international source market measured by number of visits</td>
</tr>
<tr>
<td>• 10th largest by number of nights</td>
<td>• 9th largest by number of nights</td>
</tr>
<tr>
<td>• 8th largest by expenditure</td>
<td>• 7th largest by expenditure</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.
Dutch Visitors Heat Map
Tourist Flow Across Scotland’s Regions

Top Regions Visited:

Edinburgh &
the Lothians

Greater Glasgow,
Clyde Valley

Highlands &
Islands

Darker areas = more visitors
Source: IPS, 2018.

Despite staying nearly half the length of time of long-haul travellers such as Australians or Canadians, Dutch visitors do a fair amount of exploring within Scotland. Out of Scotland’s top European markets, the Netherlands ranks first in regional spread in 2018 (1.53 regions* per visit on average). The total international average for the same period was 1.41 regions per visit.

Like the majority of international travellers, in 2018 Dutch tourists visited mostly Edinburgh and the Lothians (74,000 visits), Greater Glasgow and the Clyde Valley (51,000 visits) and the Highlands and Islands (36,000 visits). However, notable growth in visitors to Grampian, Loch Lomond, Stirling, the Trossachs and Argyll make them increasingly popular destination.

*Due to sample size and International Passenger Survey’s (IPS) methodology in the collection and publishing of tourist data, the flow of visitors within Scotland is analysed at a regional level. Each region consists of council areas as listed below.

Regional Map Legend
Ayrshire & Arran = East Ayrshire, North Ayrshire, South Ayrshire; Dumfries & Galloway = Dumfries and Galloway; Dundee & Angus = Angus, Dundee City; Fife = Fife; Grampian = Aberdeen City, Aberdeenshire, Moray; Highlands & Islands = Highland, Na h-Eileanan Siar, Orkney Islands, Shetland Islands; Edinburgh & the Lothians = City of Edinburgh, East Lothian, Midlothian, West Lothian; Perthshire = Perth and Kinross; Scottish Borders = Scottish Borders; Greater Glasgow, Clyde Valley = East Dunbartonshire, East Renfrewshire, Glasgow City, Inverclyde, North Lanarkshire, Renfrewshire, South Lanarkshire, West Dunbartonshire; Loch Lomond, Stirling, Trossachs, Argyll = Argyll and Bute, Clackmannanshire, Falkirk, Stirling.
Visitors from the Netherlands to Scotland
Historical Trend Information | 2009 - 2018

2018 was the **most successful year in the last decade** in terms of visits and the **third most successful** in terms of nights and expenditure by Netherlands residents traveling to Scotland. While total expenditure fell by 8% from 2017, 2018 continued the long-term trend of market growth, marking big increases in visits (+50%) and total expenditure (+39%) compared to 2016 levels. Scotland’s total international inbound market grew by 29% in terms of visits and 19% in terms of total spend between 2016 and 2018, making the Netherlands one of Scotland’s **fast growing markets** over the last three years.

**Inbound Tourism Volume and Value Trend, 2009-2018**

![Graph showing inbound tourism volume and value trend, 2009-2018.]

Source: IPS.

**Total Visits, Nights & Spend, 2009-2018**

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</thead>
<tbody>
<tr>
<td><strong>Total Visits (000s)</strong></td>
<td>140</td>
<td>135</td>
<td>131</td>
<td>150</td>
<td>138</td>
<td>149</td>
<td>157</td>
<td>115</td>
<td>157</td>
<td>172</td>
</tr>
<tr>
<td><strong>Total Nights (000s)</strong></td>
<td>672</td>
<td>834</td>
<td>786</td>
<td>946</td>
<td>993</td>
<td>873</td>
<td>901</td>
<td>884</td>
<td>776</td>
<td>945</td>
</tr>
<tr>
<td><strong>Total Spend (£m)</strong></td>
<td>58</td>
<td>63</td>
<td>64</td>
<td>77</td>
<td>89</td>
<td>80</td>
<td>76</td>
<td>62</td>
<td>93</td>
<td>86</td>
</tr>
</tbody>
</table>

Source: IPS.
Average Dutch Visit
Historical Trend Information | 2009 - 2018

In 2018, Dutch visitors **stayed in Scotland marginally longer** on average compared to 2017. Looking at the figures from the last ten years, however, we can notice a **slow decline** in the average length of stay which decreased from 6.3 nights in 2013-2015 to 6 nights in 2016-2018 despite the record high 2016. Average spend per trip in 2018 was the lowest in the last three years, as well as £20 below the average for the last decade. Historically, Dutch visitors tend to stay and spend less than overseas visitors on average due to the close proximity of Scotland and Netherlands, as well as the large amount of business trips which rarely exceed three days in length.

**Average Length of Stay and Spend Trend, 2009-2018**

![Average Length of Stay and Spend Trend, 2009-2018](image)

Source: IPS.

**Average Length of Stay, Daily and Total Spend, 2009-2018**

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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average Length of Stay (Nights)</strong></td>
<td>4.8</td>
<td>6.2</td>
<td>6.0</td>
<td>6.3</td>
<td>7.2</td>
<td>5.9</td>
<td>5.7</td>
<td>7.7</td>
<td>4.9</td>
<td>5.5</td>
</tr>
<tr>
<td><strong>Average Spend per Day (£)</strong></td>
<td>87</td>
<td>75</td>
<td>81</td>
<td>82</td>
<td>90</td>
<td>92</td>
<td>85</td>
<td>70</td>
<td>120</td>
<td>91</td>
</tr>
<tr>
<td><strong>Average Spend per Visit (£)</strong></td>
<td>416</td>
<td>465</td>
<td>487</td>
<td>515</td>
<td>647</td>
<td>540</td>
<td>485</td>
<td>537</td>
<td>593</td>
<td>498</td>
</tr>
</tbody>
</table>

Source: IPS.
Outbound Tourism
Visitors to the Netherlands

Trips and Spend of UK and Scottish Residents in the Netherlands, 2018

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Key Facts in 2018</th>
<th>% Change 2017/18</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total visits to the Netherlands</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>2,716,000</td>
<td>+2%</td>
</tr>
<tr>
<td>Scotland</td>
<td>223,000</td>
<td>+13%</td>
</tr>
<tr>
<td><strong>Total spend in the Netherlands</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>£1,037,765,000</td>
<td>+7%</td>
</tr>
<tr>
<td>Scotland</td>
<td>£97,605,000</td>
<td>+2%</td>
</tr>
<tr>
<td><strong>Average spend per visit</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>£382</td>
<td>+4%</td>
</tr>
<tr>
<td>Scotland</td>
<td>£438</td>
<td>-10%</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.

2018 did not differ drastically from 2017 in terms of visits by UK travellers to the Netherlands (56,000 more, or +2%). Total expenditure increased more notably, by £64m (+7%) from 2017. In 2018, the UK was the Netherland’s third largest tourism source market measured by number of visits.

In 2018, UK residents spent 4.5 nights and £85 per day while in the Netherlands which means they stayed less but spent more money daily compared to the average figures for trips to Europe. 39% of all UK visits to the Netherlands were undertaken by holidaymakers, and 30% by people going on a business trip. One in four UK travellers visited friends or relatives.

As a destination, the Netherlands amounted to 3.8% of the total UK outbound tourism in terms of visits and 2.3% in terms of expenditure in 2018. Its significance for Scotland’s overseas tourism was higher, making up 5% of all international trips undertaken by Scottish residents, and 3.2% of their total overseas spend.

In 2018, trips by Scottish residents to the Netherlands increased by 26,000 (+13%). Total expenditure grew much more marginally (+2%), marking a £48 decline in average spend per visit from 2017.

### In 2018, the Netherlands was

<table>
<thead>
<tr>
<th>The UK’s</th>
<th>Scotland’s</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 8th most popular destination measured by number of visits</td>
<td>• 5th most popular destination measured by number of visits</td>
</tr>
<tr>
<td>• 8th by expenditure</td>
<td>• 7th by expenditure</td>
</tr>
</tbody>
</table>

Source: IPS, 2018.
Scotland: Always wanted to visit 38% (survey average 15%)
To visit cities 27% (survey average 15%)
Scotland’s reputation for friendly people 24% (survey average 15%)
Range of activities available 21% (survey average 14%)

Scotland’s beautiful scenery and landscape is a strong motivator for Dutch visitors, along with the history and culture. Scotland is viewed as an ideal destination to venture off the beaten track and enjoy unspoilt landscape and wildlife. Dutch visitors like taking “touring” holidays, where they have the opportunity to take in all the sights.

Transport to Scotland
41% of visitors arrived by plane directly to Scotland. The most popular airports to arrive to were:
Edinburgh 53%
Glasgow 36%
Aberdeen 4%
3% arrived by plane (indirect)

Dutch visitors were also much more likely than other European markets to use their own car 35% (European survey average 14%) and travel by boat/ship or ferry 27% (European survey average 9%).

Planning & Booking
On average, Dutch visitors start to plan about 6 months ahead, slightly further ahead than the average European visitor. This may be due to the touring and activity nature of their holidays in Scotland.
Planning: 24.5 weeks
Travel booking: 13.7 weeks
Accommodation booking: 10.0 weeks

Dutch visitors are likely to use the internet as an information source for holiday booking, such as search engines and review websites, as well as talking with friends and family. They are also much more likely than average to use printed travel guide books (e.g. Lonely Planet, Rough Guide, Fordors).

Connections to Scotland
35% of Dutch visitors had a connection to Scotland. The most common connections were:
No personal connections but had visited many times 14%
Friends live in Scotland 9%
Family live in Scotland 6%

Although some visitors from The Netherlands have family/friend connections, this is generally lower than for long-haul markets. A more significant amount had no personal connections but were repeat visitors to Scotland.

Motivations to Visit Scotland
Scenery & landscape 75% (survey average 50%)
History & culture 54% (survey average 33%)
Always wanted to visit 38% (survey average 15%)
To visit cities 27% (survey average 15%)
Scotland’s reputation for friendly people 24% (survey average 15%)
Range of activities available 21% (survey average 14%)

Scotland's beautiful scenery and landscape is a strong motivator for Dutch visitors, along with the history and culture. Scotland is viewed as an ideal destination to venture off the beaten track and enjoy unspoilt landscape and wildlife. Dutch visitors like taking “touring” holidays, where they have the opportunity to take in all the sights.
TOP 5 ACTIVITIES IN SCOTLAND

- Sightseeing by car/coach/on foot 80% (survey average 74%)
- Visited cathedral, church 72% (survey average 46%)
- Centre based walking (i.e around a town centre) 70% (survey average 45%)
- Visited cities 65% (survey average 42%)
- Visited castle/ historic house 62% (survey average 60%)

Visitors from The Netherlands are typically very active during their holiday in Scotland.

Slightly lower down the list but notably higher for visitors from The Netherlands were:

- Long walk, hike or ramble 55%* (which was the highest figure across all markets surveyed)
- Watched wildlife, birdwatching 21%

ACCOMMODATION

Accommodation Preferences:

- Hotel 52% (survey average 41%)
- Camping 18% highest across all markets (survey average 6%)
- B&B/GH 18% (survey average 20%)
- Self-catering 17% (survey average 22%)
- Friends/family 16% (survey average 19%)

Aspects Important in Choosing Accommodation:

- Location 73%
- Value for Money 43%
- Availability of free Wi-Fi at accommodation 21%
- Quality star grading 19%

Source: Scotland Visitor Survey 2015/2016
INSIGHT DEPARTMENT: NETHERLANDS FACTSHEET 2018

Satisfaction with the Visitor Experience

Dutch visitors were positive about their experience in Scotland and just over half are highly likely to recommend Scotland as a destination (although slightly lower than the European average).

<table>
<thead>
<tr>
<th></th>
<th>MEAN</th>
<th>Top 2 Box (9 or 10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall rating of Holiday Experience (scale 1-10)</td>
<td>8.6</td>
<td>48%</td>
</tr>
<tr>
<td>Likelihood to Recommend</td>
<td>8.6</td>
<td>51%</td>
</tr>
</tbody>
</table>

Areas of the visitor experience which recorded mean scores below 8 include:

- Availability of local produce when eating out
- Value for money of eating out
- Mobile phone signal coverage
- Availability of free Wi-Fi
- Availability of 3G/4G

Source: Scotland Visitor Survey 2015/2016
Popular Media Channels

Research with consumers from The Netherlands on VisitScotland’s database has provided examples of key media channels used by these consumers.

Key Websites Used
- Google
- Facebook
- Hotmail
- Startpagina
- Telegraaf
- Marktplaats
- Buienradar
- Hyves

Key Social Media Accounts
- Facebook
- WhatsApp
- YouTube
- Google+
- TripAdvisor
- LinkedIn
- Instagram
- Twitter
- Pinterest

Key Newspapers Read (online or print)
- De Telegraaf
- De Volkskrant
- Nrc
- Metro
- Spits
- Nu.nl
- Algemeen Dagblad
- Noordhollands Dagblad
- Trouw

Key Magazines Read (online or in print)
- Libelle
- Kampioen
- Margriet
- Elsevier
- Reizen
- Landleven
- Plus
- Quest
- National Geographic

Influential TV Programmes for Travel
- Outlander
- Coast
- Braveheart

Source: VisitScotland Research 2014-2017
Appendix

International Passenger Survey 2018

USING AND INTERPRETING STATISTICAL DATA
Sources: Data is sourced from the Office for National Statistics’ International Passenger Survey (IPS). Information about the survey can be found on the VisitBritain website www.visitbritain.org (Insights & Statistics section) or the Office for National Statistics website www.statistics.gov.uk/hub/index.html.

Sample Sizes: Analysis of sub-groups, such as trips by purpose or demographic group, relies on small sample sizes that can be unreliable. Where this is a particular issue, methods to aggregate data, such as using a 3-year average instead of single-year data, have been used. Before using the data, it is important to recognise the limitations of using a small sample size. Further information, including methodology and sample sizes, can be found on the VisitBritain website www.visitbritain.org (Insights & Statistics section).

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Front Cover: The Gatehouse To Ballindalloch Castle
© 2018 VisitScotland / Paul Tomkins

Back Cover: Dunfermline Abbey
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