

# Market insight



## Netherlands

Analysis of tourist profiles, traveler flows, transportation and target groups

April 2019



ÍSLANDSSTOFA  
PROMOTE ICELAND

# Market profile

## Economy

### Real GDP Growth



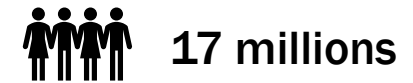
### GDP per capita



### Consumer price inflation



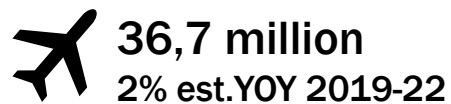
### Population



## Travel & Tourism

### GLOBAL

#### Total Outbound Trips



#### Average spend per trip



### ICELAND

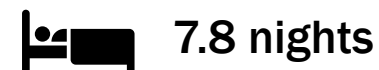
#### Dutch visitors to Iceland 2018



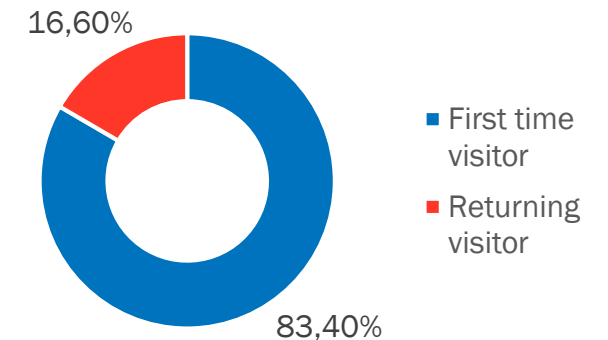
#### Share of guest nights



#### Average length of stay



#### Likelihood of return visit



# Air Transportation

## All year direct flights

- Amsterdam

## Seasonal direct flights

- Rotterdam

## Airlines



## Air capacity to Iceland 2017



492 thousand seats  
-9,1% YOY



# Seasonality

Netherlands is a very stable visitor market in Iceland. The majority of the Dutch visitors come during the summer time even though a trend is to travel to Iceland in May as well. This year we will see an increase in direct flights to Akureyri during both winter and summer time

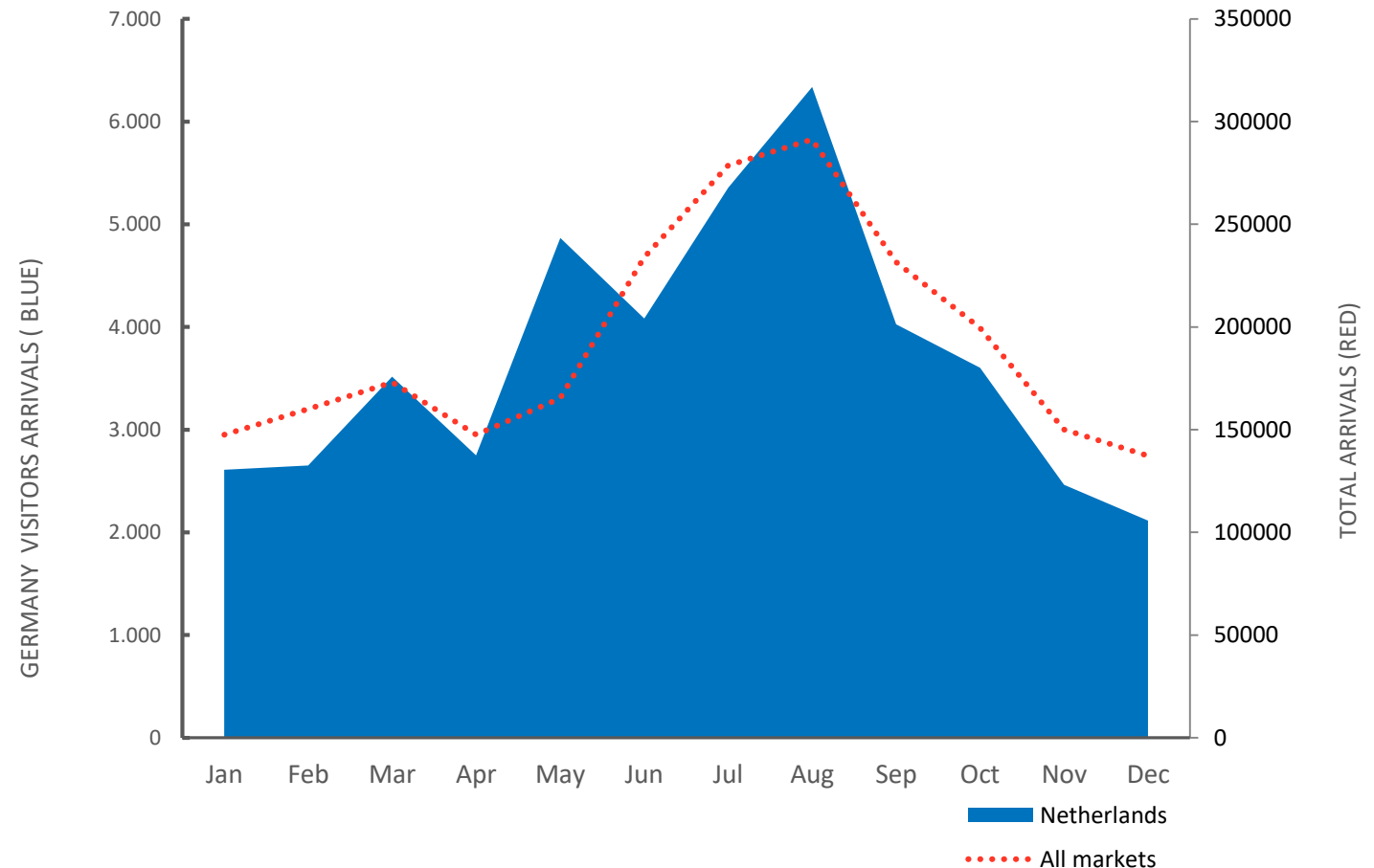
## COME DURING

**SUMMER: 35%**  
(JUNE - AUGUST, ALL MARKET AVG 35%)

**WINTER: 30%**  
(JAN - MARCH, NOV - DEC  
ALL MARKET AVG 33%)

**SPRING: 18%**  
(APRIL - MAY, ALL MARKET AVG 14%)

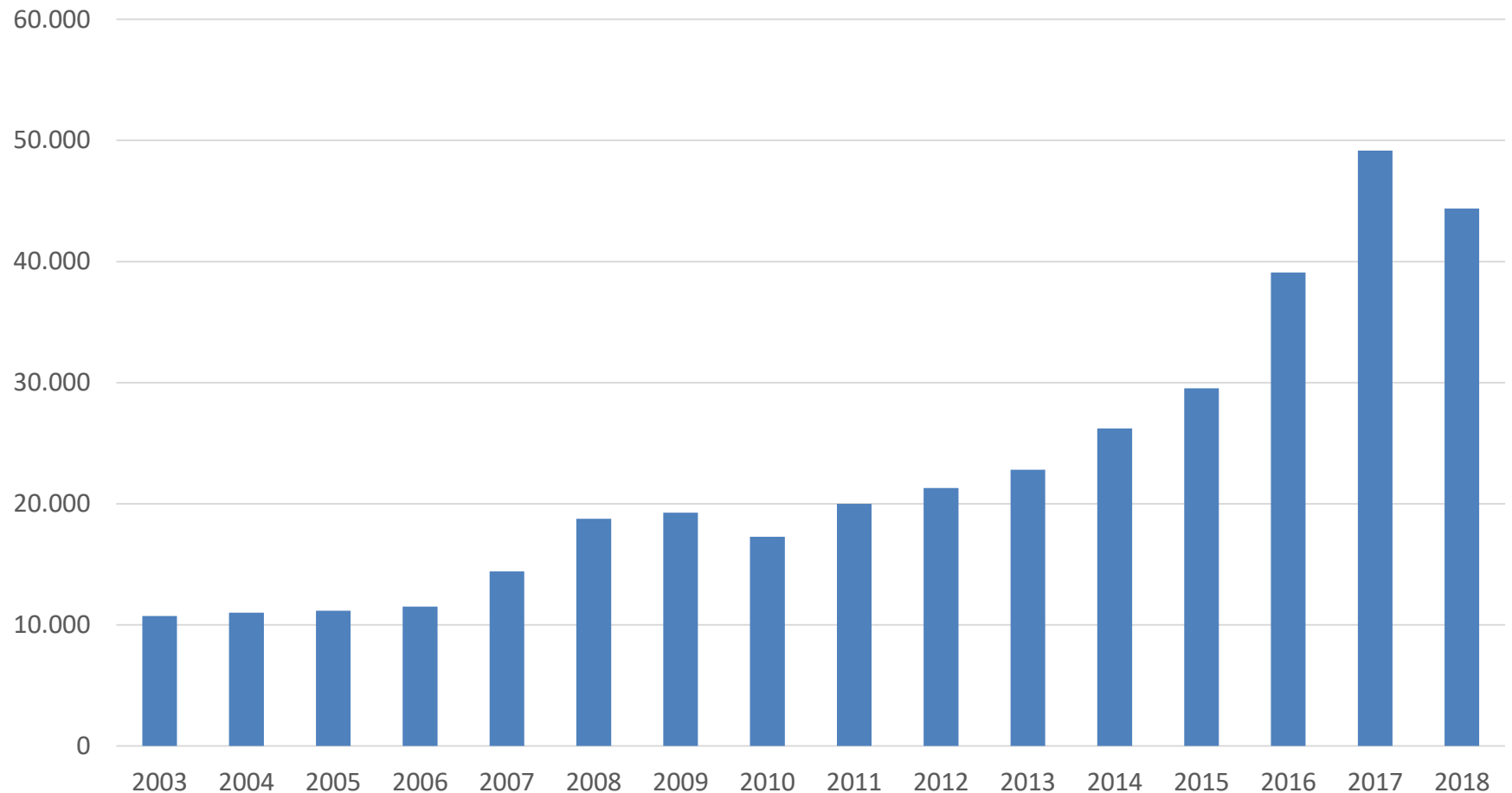
**AUTUMN: 17%**  
(SEPT - OCT, ALL MARKET AVG 19%)



# Arrivals over time

- Icelandair has been the main airline connecting Iceland and the Netherlands for the longest time.
- There was a substantial increase in visitor arrivals from Netherlands from 2016 due to WOW air starting direct flights in august that year.

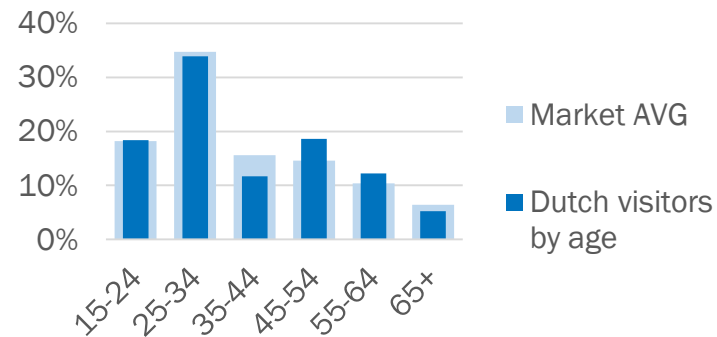
Visitor arrivals from



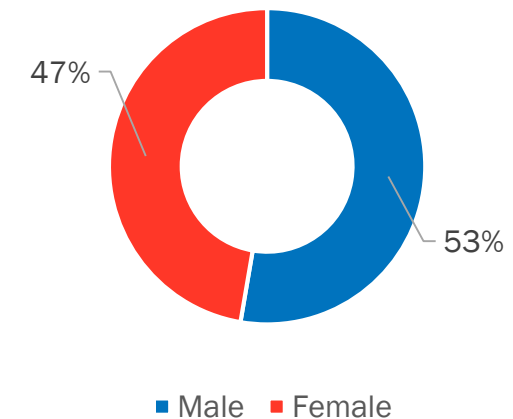
# Traveler profile

- International travellers from the Netherlands take around 2,8 travels a year, usually one longer one and two shorter ones.
- Dutch people travel mostly during summer and winter time aiming on longer stays during summer and shorter during winter. Shorter breaks are becoming more popular.
- 72% of Dutch use the internet as a source of information and inspiration before going on a holiday and decide on destination between 1-6 months in advance.
- A high number travel with their spouse or around 58% while only 11% travel alone.
- There is a strong growth within the 55+ market
- Dutch travelers are very positive towards returning to Iceland and according to a survey in February 2019 93% said they would return.

### Dutch visitors by age



### Dutch visitors by gender



# MARKET SNAPSHOT PREPARED BY PROMOTE ICELAND

APRIL 2019

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Promote Iceland aims to enhance Iceland's good image and reputation, to support the competitive standing of Icelandic industries in foreign markets, to attract foreign tourists and investments to the country, and assist in the promotion of Icelandic culture abroad.

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