

Netherlands

Key Market Message

Figures from the Netherlands' official travel industry body, ANVR, indicate that bookings made to Australia and New Zealand via the travel trade are down 2 per cent. However, overall arrivals to Australia are up from The Netherlands, suggesting changes in the way consumers are planning and booking their holidays to Australia and New Zealand.

1. Key Market Results and Achievements

- Tourism Australia continues to successfully leverage off the Australian-themed Den Haag Sculpture Exhibition, attracting over 1,000 entries to an Australia trip competition in the first month of the exhibition alone.

2. Australian Travel Market

2.1 Market performance

- 21.6 thousand visitor arrivals to Australia during the six months to June 2007, which is the same number relative to the previous year.
- 51.1 thousand visitor arrivals during the year ended 30 June 2007, an increase of 2 per cent relative to the previous year.
- 2.2 thousand visitor arrivals during June 2007, an increase of 3 per cent relative to the previous year.

2.2 Trade Information Summary

- KRAS has launched its new long-haul brochure which includes 16 pages on Australia. Australia and New Zealand are new destinations for KRAS, which is typically known as a European Coach operator. China is its strongest Long-haul destination.
- KRAS also launched a direct-mail campaign – a full colour 40-page booklet promoting specific tours - to a database of 50,000 consumers who have booked with the tour operator in the past two years. The booklet included a 20-day tour of Australia for €3,599 including accommodation, breakfast and diner. A 25-day New Zealand package was also included, priced at €4,049.
- 'Fluid pricing,' wherein travel prices vary based on capacity and demand at the moment of booking, is having a major impact within the Dutch travel industry. ER Travel Group is the first larger tour operator launching 'day fares' for a bulk programme. It is to be expected that other tour operators soon will follow this initiative. However, fluid pricing is not yet being applied to long-haul destinations.
Source: Reisrevue July 13th, 2007
- Dutch Travel Websites: According to research agency Multiscope, the travel offer website 'Inpakken en Wegwezen' (Pack & Go) is the most frequently visited Dutch website in the category travel. The website attracts more than 2 million visitors per month. The following most popular travel websites are direct seller Sunweb and the National Tourist Office of the UK. The Top 20 travel websites are dominated by companies of mainly Dutch origin like Kras Reizen, Arke and D-Reizen. It appears that larger international companies such as Expedia have difficulty in entering the Dutch travel industry. For more information visit: www.inpakkenenwegwezen.nl. *Source: Press release Inpakken en Wegwezen, June 28th, 2007*
- New travel search engine launched: Ilse Media, part of multinational publisher Sanoma, launched a search engine based on real time bookable travel offers: www.reizen.ilse.nl. The website also offers the possibility to compose a custom-made package with different components. The so-called 'vertical search' is offering real time bookable tour operator packages. At the time of the launch, 25 brands were participating, including all major tour operators such as Neckermann, Vrij Uit, Kras, Arke, Holland International and Oad. The site offers comprehensive selection criteria, allowing customers to tailor-make their own holidays, as well as packages, rental cars, etc. *Source: Reisrevue 20 July, 2007*
- There are currently 252 qualified Aussie Specialists in the Netherlands with a further 191 agents in training.

3. Current and Upcoming Activities in Market

3.1 Consumer Marketing:

Activity	Description	Partners	Timing
Den Haag Sculpture Exhibition	<ul style="list-style-type: none">Leverage off TA sponsorship of Sculpture Exhibition themed around Australia to distribute experience messaging to Dutch consumers.	Malaysia Airlines, Tasman Travel	1 June - 15 September 2007
Online Competition	<ul style="list-style-type: none">Viral game and online consumer competition promoting Australia as a youth destination	Cathay Pacific, Australian Backpackers	7 September - 7 October 2007

3.2 Trade Marketing:

Activity	Description	Partners	Timing
ASP Recruitment	<ul style="list-style-type: none">Increase Australia knowledge via ASP training incentive through Kupers and Shoenemaekers Travel agency chains in Limburg.		Running until November
Trade Destination Supplement	<ul style="list-style-type: none">16-page destination supplement including the 7 key experiences and the ASP programme being distributed via Travelution trade magazine.	Qantas	5 September 07
Training Roadshow	<ul style="list-style-type: none">Two-day Kuoni travel agents training Roadshow	TVic, TNT, SATC, TTas, TNSW	1, 2 October
Industry Meeting	<ul style="list-style-type: none">Half-yearly Dutch trade industry meeting		7 November
Trade and Consumer Show	<ul style="list-style-type: none">Vakantiebeurs 2008 in Utrecht. The biggest and most important travel show for both consumers and trade in The Netherlands.	All suppliers welcome to partner on stand	8-13 January 2008

For more information on these activities and opportunities, please contact the Industry Liaison Executive for your state or territory:

Website: <http://www.tourism.australia.com/industryliasion>

Email: marketing@tourism.australia.com

4. Media/PR

4.1 Major stories generated as a result of VJP and PR activities

Date	Journalist	Publication	Headline
July – Aug 2007	Maartje Rooker Maartje Rooker	www.australie.nl	Sydney Opera House World Heritage Australian Youth Orchestra
July 2007	Lars Schneider	Op Pad magazine	Sydney and beyond, outdoors
July 2007	Marco de Vries	Residence magazine	Outback, Australian Bush and wildlife
July 2007	Jan Bartelds	www.tourpress	The Hague Down Under Sculpture
June 2007	Johan Öberg	Metro	Indigenous experience in Arnhem Land

4.2 Major stories on Australia (not VJP or PR activity related)

Date	Title	Publication	Article Summary
20 August 2007	Woman killed by camel	De Telegraaf	Small news column on woman in Queensland killed by camel
14 August 2007	Dick Advocaat	Dailies, online news portal	Dick Advocaat will become new coach of Australian Soccer team
6 August 2007	Alcohol restrictions	www.planet.nl dailies	Alcohol restrictions for Indigenous people in Katherine(ABC news)
22 July 2007	Successful against spam	De Telegraaf, regional dailies	New law reduces spam, can set the example worldwide
July 2007	Warning for attack	Dailies, radionews	Australia warns on possibility of a terrorist attacks on Bali.

5. General Travel Outlook

5.1 Political and Economic Outlook

- Following GDP growth of 2.9 per cent in 2006, economic growth is forecast to decelerate slightly to 2.4 per cent in 2007 and 2.3 per cent in 2008. After averaging 1.7 per cent in 2006, inflation (EU harmonised measure) is forecast to stay below 2 per cent over the outlook period. The current account will record surpluses of around 7 per cent of GDP in 2007-08.
- The outcome of the summit of EU leaders on 23 June 2007 was to a large extent in line with the demands of the Dutch government, which wanted to see the originally proposed EU constitution scrapped in favour of some adjustments to the existing treaties. However, it remains uncertain whether a referendum will be held; a decision is not expected to be taken until next year. The Economist Intelligence Unit continues to believe that there is a considerable risk that even an amended treaty would be rejected in a further referendum, although the risk of a rejection has decreased, as the new treaty is not likely to entail any further significant loss of sovereignty in relation to the status quo.
- In late June, the Dutch parliament approved a government plan to force utilities companies to separate their transmission grids from their production and commercial activities. This "unbundling" will be followed by the sale of the production and commercial activities of incumbent operators.

Source - <http://www.economist.com/countries/netherlands/profile.cfm?folder=Profile-Forecast>

5.2 Outbound Travel

- In comparison to last year, 4 per cent more summer holidays were booked at an ANVR tour operator (year to date 7 July 2007). June was a very good month for bookings, most likely as a result of bad weather
- All types of holidays did well in June bookings: European air destinations (+3 per cent), long haul destinations (+24 per cent), car holidays (+30 per cent), coach holidays (+25 per cent) and train holidays (+64 per cent).
- Long haul destinations are still very popular for the year (+7 per cent). Especially North America (+11 per cent), the Dutch Antilles (+38 per cent), and South Africa (+15 per cent) do very well. In the Far East (+3 per cent) Indonesia (+43 per cent), China (+23 per cent), Vietnam (+35 per cent) and India/Nepal (+21 per cent) are welcoming many Dutch.
- These figures only refer to Dutch tour operator statistics and do not reflect the increasing number of direct bookings.

Source: ANVR, Nipo Statistics, 23 July, 2007

- According to Holiday and Leisure Monitor research undertaken by Gfk Panel Services Benelux, last year saw 80 per cent of the Dutch took at least one holiday – a small increase on 2005. The total number of holidays taken by the Dutch in 2006 - domestic as well as foreign – also increased slightly.
- In total, 55 per cent of all holidays taken by the Dutch were spent abroad. Over the next few years, Gfk expects that the number of foreign holidays taken by the Dutch will increase by 3.1 per cent each year and the number of domestic holidays by 1.4 per cent.
- Long holidays (four nights or more) are expected to increase by 2.8 per cent annually, but they are becoming shorter. In 1988 the duration of a long holiday was 13.7 days on average, whilst in 2006 the average long-holiday was 11.8 days. Expenditure during long holidays is expected to increase by 1 per cent annually. For more information visit: www.nritmedia.nl.

Source: NRIT Media, 17 July, 2007

Competitor Information

- South America, and especially Mexico and Brazil have already gained increased passenger arrivals because of the introduction of low cost carriers over the last three years.
Source: Planet NL, 28 August, 2007
- The Greek, Israeli, American and South African Tourism boards each advertised on travel industry website, Reiserevue, in August.