



UNLOCKING THE NETHERLANDS MARKET

BY SAT INSIGHTS UNIT



SOUTH AFRICAN TOURISM



Netherlands facts

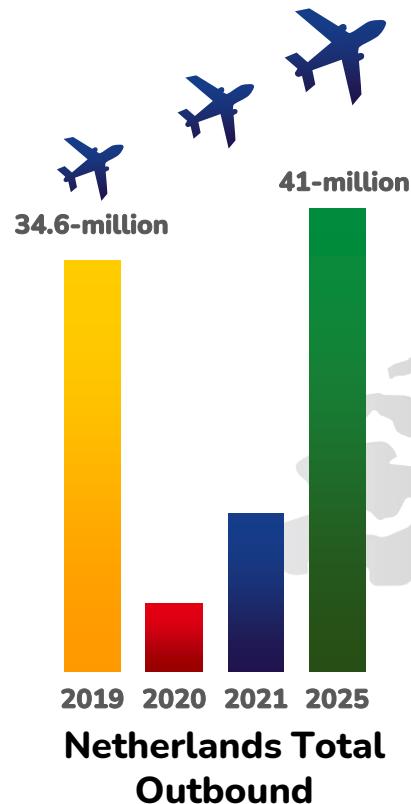


Netherlands travel status

Dutch global outbound tourist numbers are **surpassed** 2019's 35-million in **2024**, reaching 39 million, 2025's outbound is expected to reach

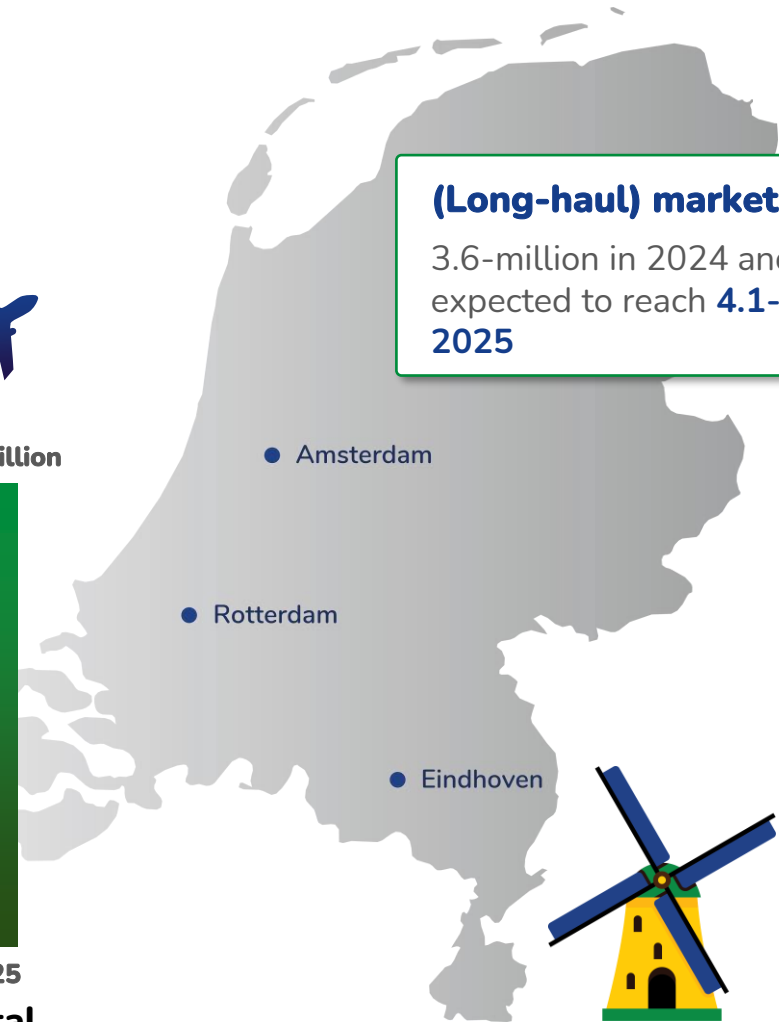
41 million+

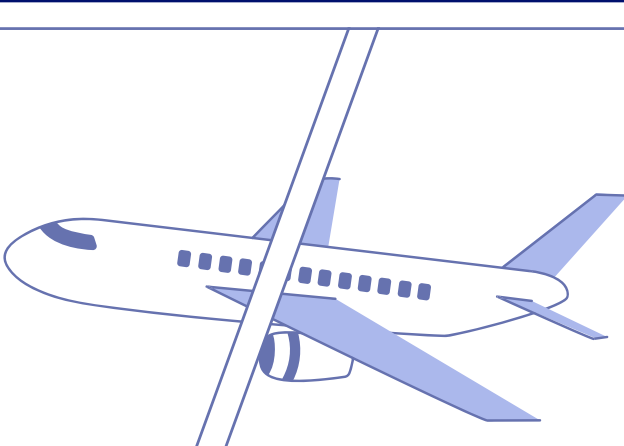
Dutch outbound tourist numbers to **sub-Saharan Africa** are expected to reach **412 450** by 2025



(Long-haul) market size:

3.6-million in 2024 and expected to reach **4.1-million** in **2025**





South Africa arrivals
from Netherlands in
2024

132 422

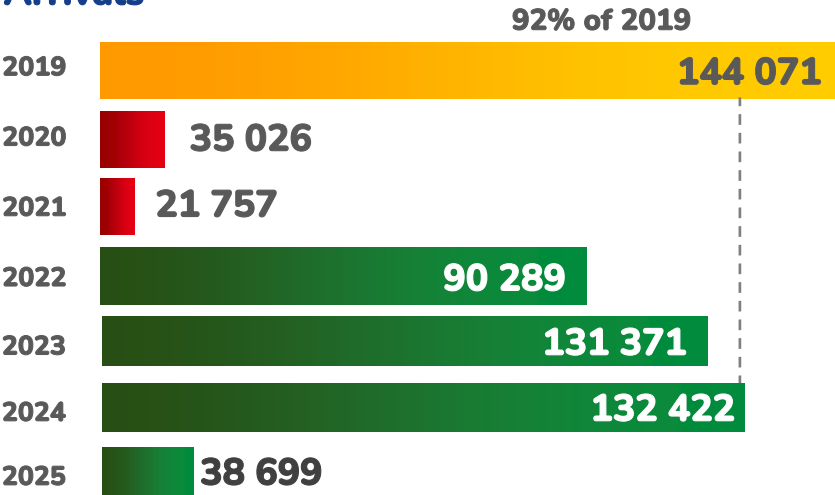
Netherlands travel trends

Total arrivals reached 132,422, reflecting a modest increase of 0.8% compared to the 131,371 arrivals recorded in 2023.

While holidays accounted for the largest share of arrivals in 2024, the growth was primarily driven by visits to friends and relatives (VFR) and MICE travel.



Arrivals



* Arrivals 2025 year to date – Jan to March 2025

Dutch Arrivals to South Africa **remained flat (0,8%) between 2023 and 2024**, while it can be anticipated to grow by 7.7% in **2025**. While Netherlands' total outbound is anticipated to grow by 5.0%

More on the Dutch traveller to South Africa



Dutch visitors spent R3.1 billion in South Africa in 2023, but this declined by 7.9% to R2.9 billion in 2024. With an average spend of R25,200 per traveller, they typically stay a minimum of 15 nights, allocating around R11,900 to accommodation, R7,200 to shopping, and R7,800 to food during their visit.



Their key purpose of travel is **Holiday (53%)** and Visiting Family & Friends (**16%**)



70% of Dutch visitors booked 3 months ahead of their travel and 40% of those booked within a month of travel



62% prefer to buy their travel products unbundled and **31%** prefer to buy in a form of a fully packaged travel product

South Africa is foreseen to see a **healthy growth of 7,7%** from the Dutch market. Some of South Africa's competitors that are estimated to see favourable, considerable growth;

#1  **China**

#2  **Indonesia**

#3  **Kenya**

 **Australia**

 **USA**

 **Thailand**

 **Brazil**

 **Canada**

 **India**

 **Mexico**

Other competitors

Dutch travellers are looking for



Destinations that are less crowded



Sustainable travel options



Wellness retreats



Authentic experiences



Value for money



Relaxation



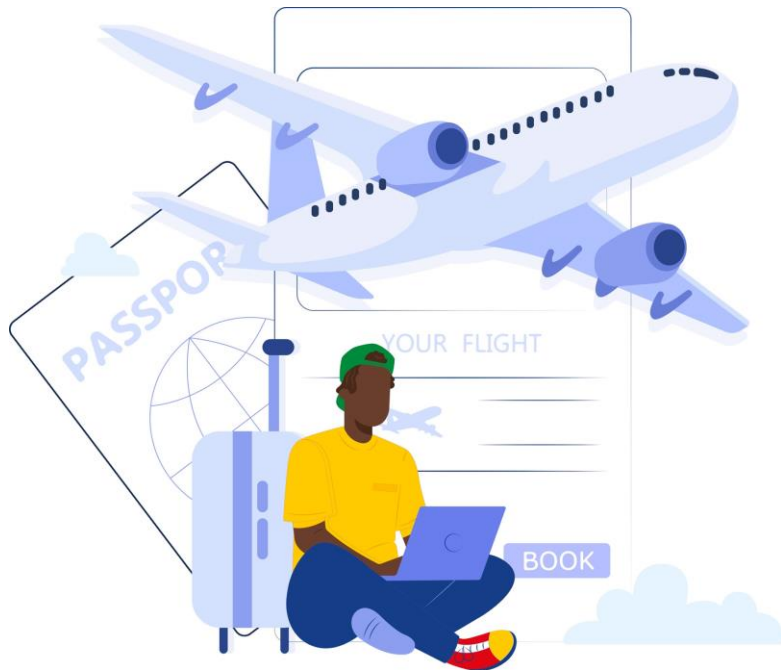
City breaks



Nature and outdoor activities

Dutch travellers prioritise these activities, globally

Getting to South Africa



KLM Royal Dutch Airlines operates several direct daily flights between Amsterdam and Johannesburg or Cape Town



Other airlines that offer flights between Amsterdam and South Africa are:



Average fare



Amsterdam to JHB/CPT
\$901/R16 521

Flight duration: direct



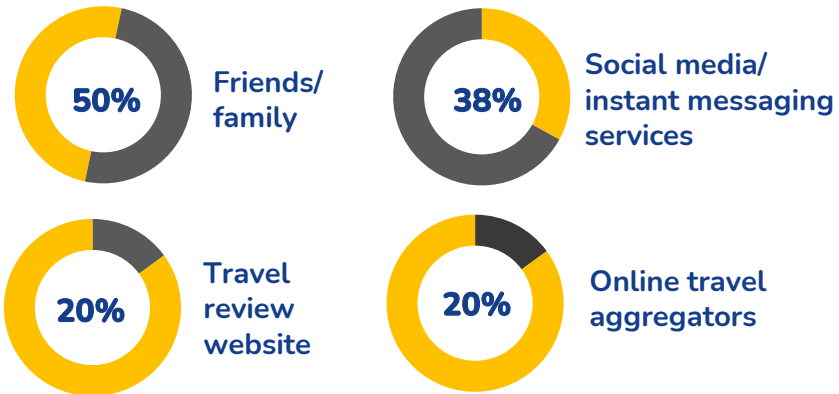
Amsterdam to JHB
11 hours

Amsterdam to CPT
11.5 hours

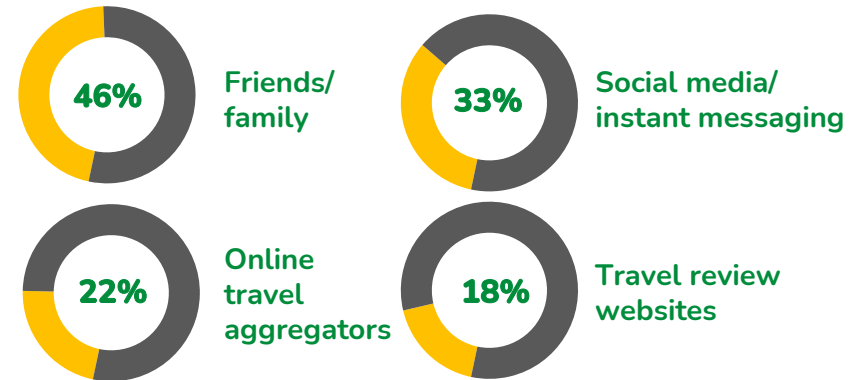
When sharing their holiday experiences, The Dutch's preferred channels are **friends/family** or **Social media/ instant messaging services**

Role of Media Channels

Channels used to share details of holiday experiences during trips



Channels used to share holiday experiences after trips



Profile of the Dutch traveller to South Africa

Dutch traveller facts:



Three in five of Dutch visitors are **repeat travellers** (49% in 2024)



Just more than half of Dutch travellers are **male** (65% in 2024)



Most Dutch visitors travel **alone (41% in 2024)** or with a spouse/partner (38%)



Age groups **25 to 40** make up 47% of visitors from this market, and **41 to 60** y.o account for 39%



Most popular attractions in the **V&A Waterfront, the Cape Town Central City, Cape Point** and the **Cape Winelands**



MICE Tourists account for 11% of arrivals from this region, and Business Travellers account for 14%



Travel allows the Dutch to learn about cultures, gives them an opportunity to break-free



The Dutch preferred media channels include Online news, articles, web pages, blogs, travel booking / review websites; Travel brochures, and Video streaming (YouTube)



Inspired by word-of-mouth, the Dutch seek detailed information about their travel destinations.

Activities of choice



Eating out

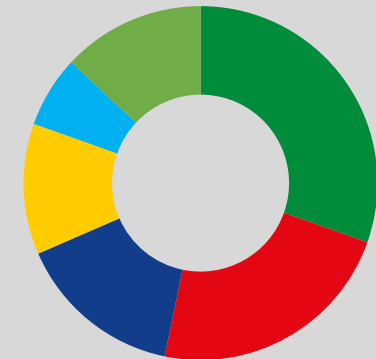


Shopping



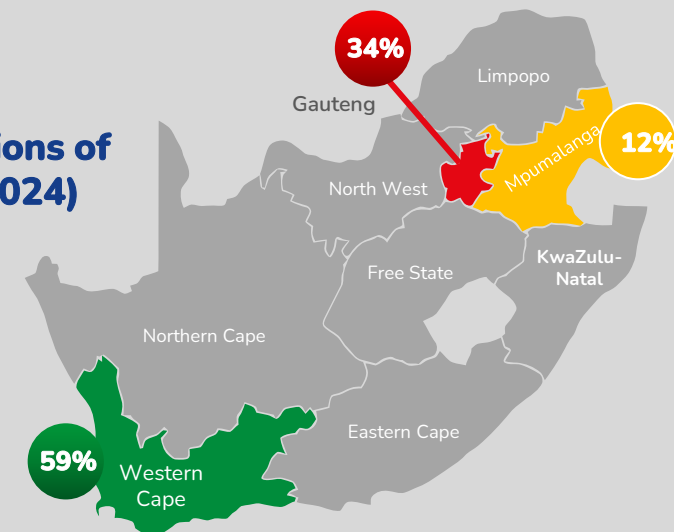
Visiting Natural Attractions

Three top places to stay



Family and friends
Game Lodge
Other
Hotel
Self Catering
Guesthouses

Destinations of choice (2024)





SOUTH AFRICAN TOURISM

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