

Market in snapshots – the Netherlands

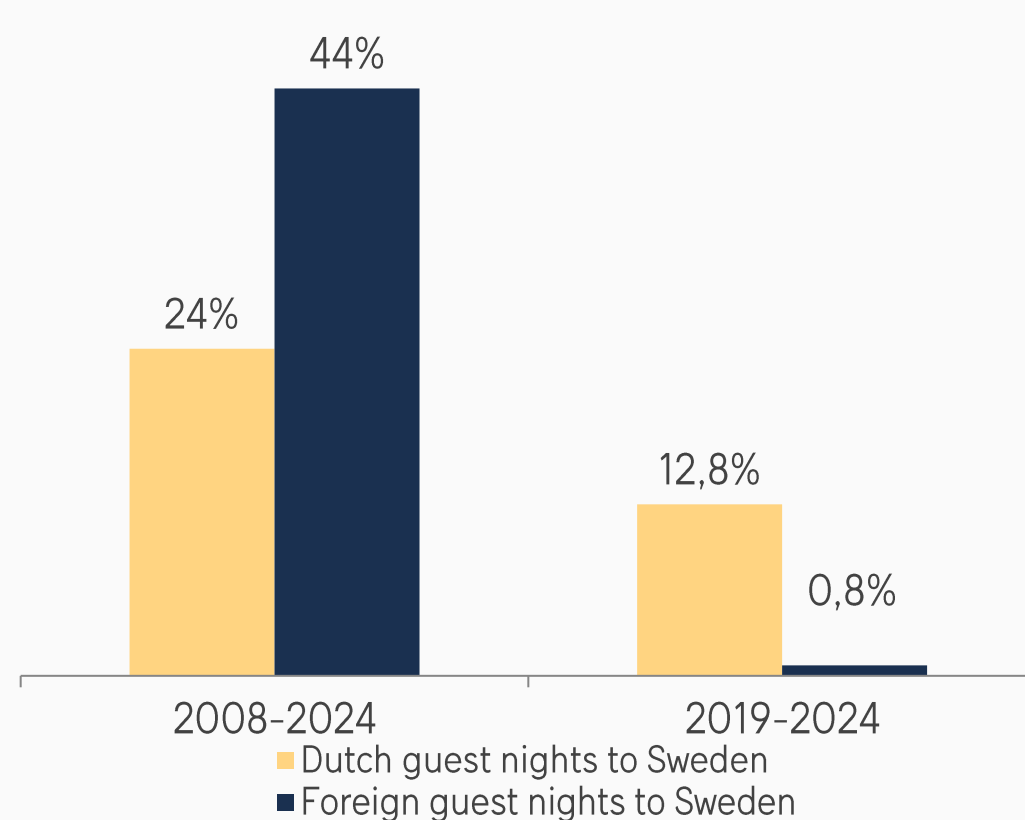


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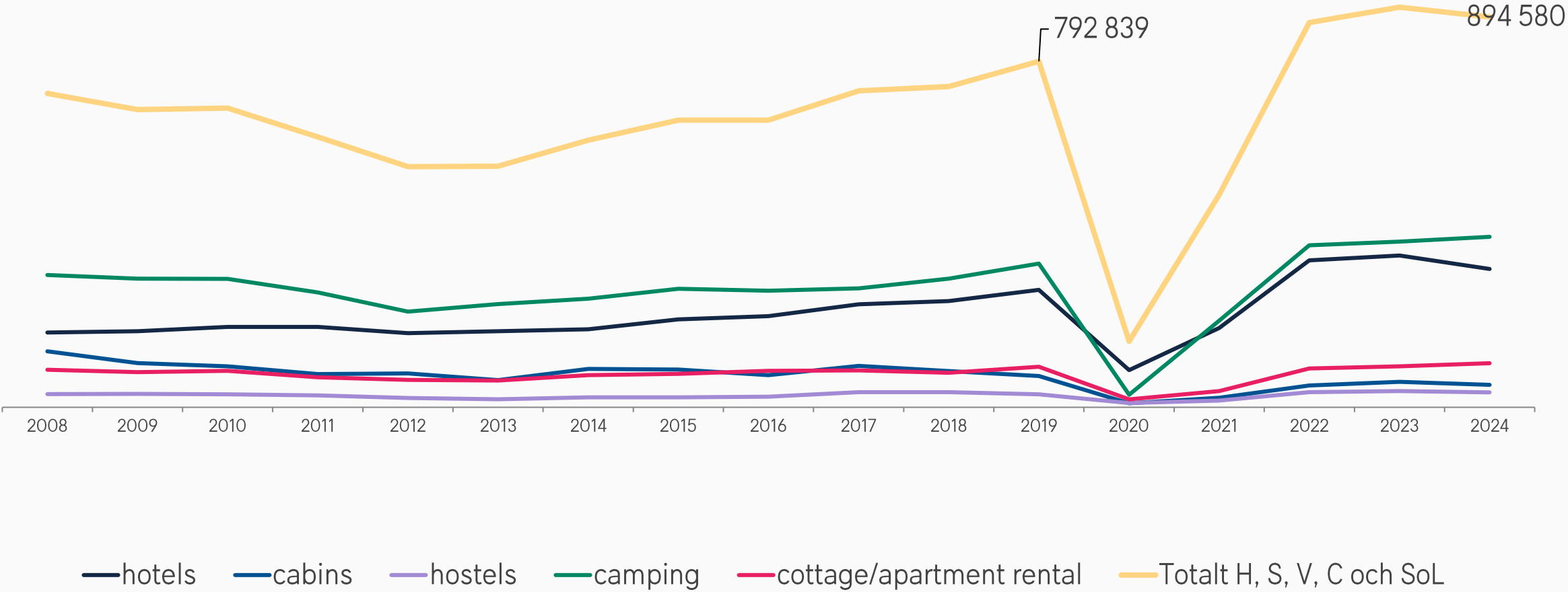
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The Dutch market – some facts and figures

BNP growth 2025	1,3%
Dutch guest nights in Sweden 2024	894.580
Change of Dutch guest nights in Sweden 2008-2024	+24,4%
Change of Dutch guest nights abroad (in general) 2008-2024	+27%
Part of Dutch foreign guest nights to Sweden 2024	0,6%

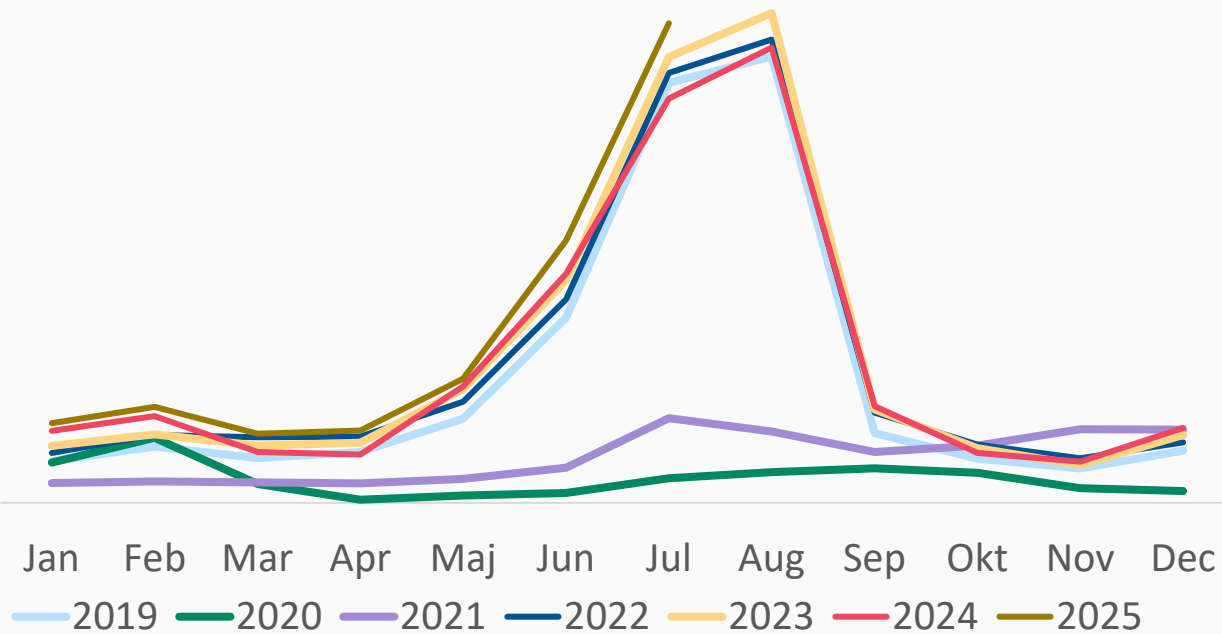


Development of Dutch overnight stays in various forms of accommodation



Källa: Tillväxtverket/SCB (2024), Antal gästnätter avser HSVCSol: Hotell (H), stugbyar (S), vandrarhem (V), campingplatser (C) och förmedlade privata stugor och lägenheter (SoL).

Travel patterns of the Dutch visitors



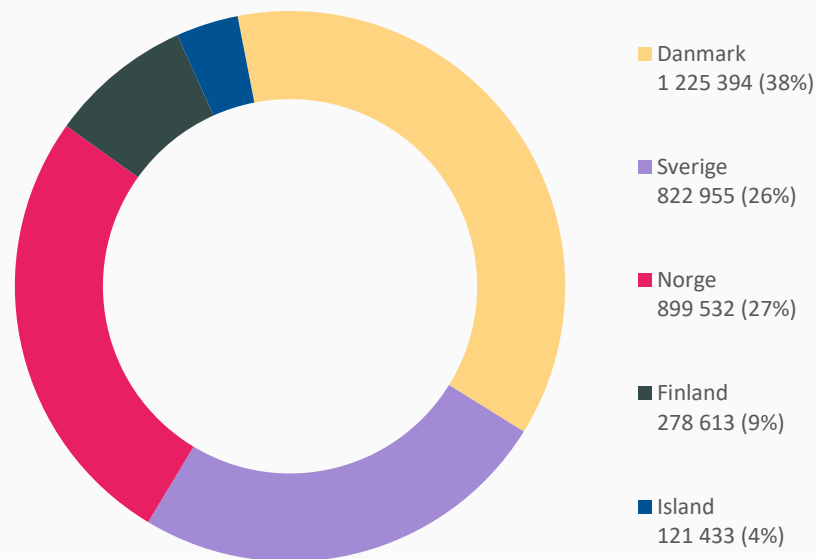
- 59% stay more than 5 nights (40% >8 nights)
- 23% stay over a (long) weekend
- Rise in winter and spring

Graph / Source: Tillväxtverket/SCB (2024)
Målgruppsanalys 2024 (Spring), Visit Sweden/YouGov



Johan Willner/imagebank.sweden.se

The Dutch top 5 destinations in Europe (2024) & division in the Nordics (2023)



Källa: Global Travel Service, Oxford Economics (2024), *Nordisk statistik utifrån Ländernas statistiska centralbyråer, Endast övernattningar på hotell, semesteranläggningar, vandrarhem och campingplatser

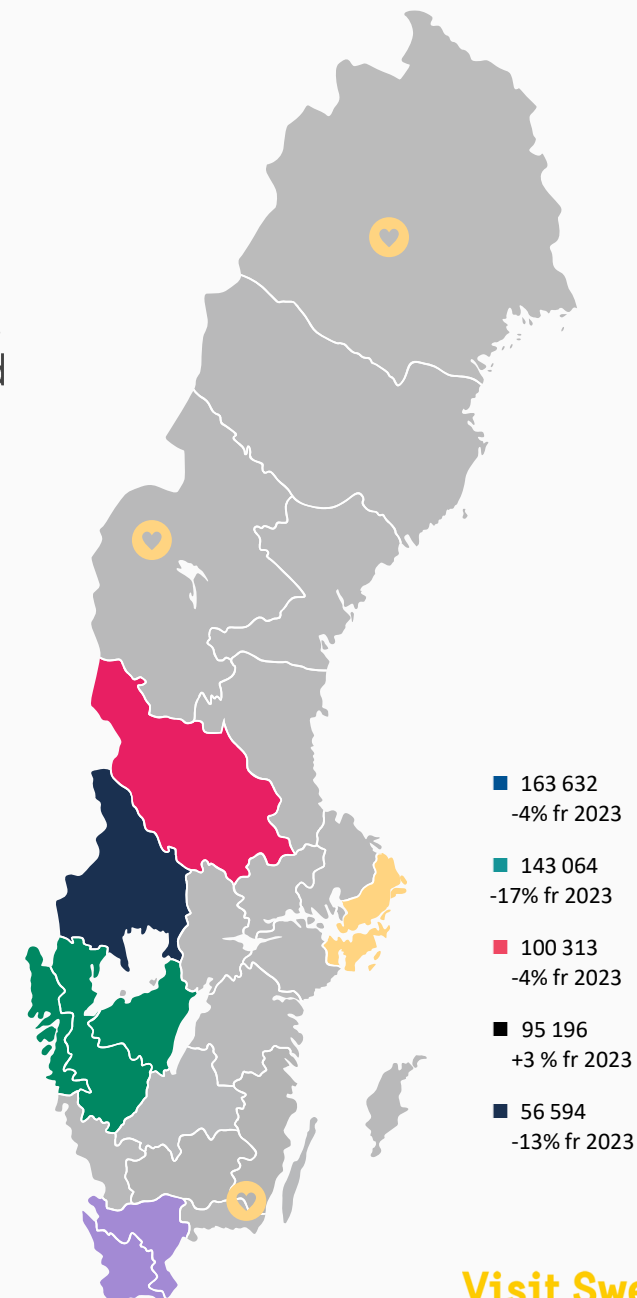
Counties with the most Dutch overnight stays in 2024

County	Guest Nights 2024	Guest Nights 2023	% Change	Change
Västra Götaland	163 632	171 258	-4%	-7 626
Stockholm	143 064	171 413	-17%	-28 349
Skåne	100 313	104 569	-4%	-4 256
Dalarna	95 196	92 222	3%	2 974
Värmland	56 594	64 903	-13%	-8 309
Jönköping	46 760	44 673	5%	2 087
Kronoberg	46 316	43 003	8%	3 313
Norrbottn	40 944	33 387	23%	7 557
Kalmar	36 564	31 673	15%	4 891
Jämtland	28 970	23 459	23%	5 511
Halland	23 366	22 939	2%	427
Blekinge	22 263	17 684	26%	4 579
Orebro	20 718	23 736	-13%	-3 018
Ostergötland	18 379	20 575	-11%	-2 196
Västerbotten	12 511	13 218	-5%	-707
Gävleborg	9 838	8 926	10%	912
Västernorrland	7 828	8 339	-6%	-511
Södermanland	7 608	7 044	8%	564
Uppsala	7 078	5 851	21%	1 227
Gotland	3 377	4 887	-31%	-1 510
Västmanland	3 261	3 183	2%	78

Due to a change in booking systems, the statistics from summer 2024 and onwards are not completely reliable, since hotel nights are partly missing. AirBnB is not registered either.

We see the biggest rise of guest nights between 2023 and 2024 to Norrbotten (Swedish Lapland), Jämtland, Kalmar & Blekinge.

38% of global travellers with an interest in Sweden who have visited Sweden before also have a wish to visit Swedish Lapland in the future.



Källa: Tillväxtverket/SCB (2024)

Källa: Visit Sweden Målgruppsanalys 2024, Visit Sweden/YouGov, Nederländerna.

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Growth potential for the Dutch market

81%

**There are 6,5 million
Dutch Global Travellers
with interest in Sweden
as a destination**

of Dutch global travellers is interested in
visiting Sweden on holiday (26% returning
visitors, 55% first time visitors)



Values, interests and motivations of the Dutch Global Travellers



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Johan Willner/imagebank.sweden.se

Key values and interests of the Dutch Global Travellers

Top 5 values

- My family is the most important
- To have a good time
- Everyone should have equal fair chances in life
- To take care of the environment
- A healthy lifestyle

Top 5 interests

- Travel
- Be in the nature
- Eat at a restaurant
- Watch a movie
- Read books

Associations with Sweden

- Beautiful
- Has a unique, pristine and accessible nature
- Healthy lifestyle
- A safe and secure destination
- Offers all-year-round outdoor experiences that are interesting to me
- Good destination for holiday at a camping and in cabins
- Good city experiences
- An expensive holiday destination
- Welcoming
- Interesting cultural sights

Marknad: Nederländerna
Bas: Den globala resenären
Källa: Visit Sweden Brand Tracking 2023, Visit Sweden/lpsos



'Tina Stafren/imagebank.sweden.se'

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Most important motivations for a holiday in Sweden

- Experience nature
- Have fun with my travel company
- Feel free
- Relax
- Enjoy peace & quiet
- Explore new cities and places
- Find myself (again)
- See and do as much as possible
- Enjoy good food and beverage
- Find local, unique experiences

Målgruppsanalys 2024, Visit Sweden/YouGov, Nederländerna, Målgrupp: Globala resenärer med Sverigeintresse.



'Doris Beling/Folio/imagebank.sweden.se'

A potential tour to Sweden, based on Dutch preferences



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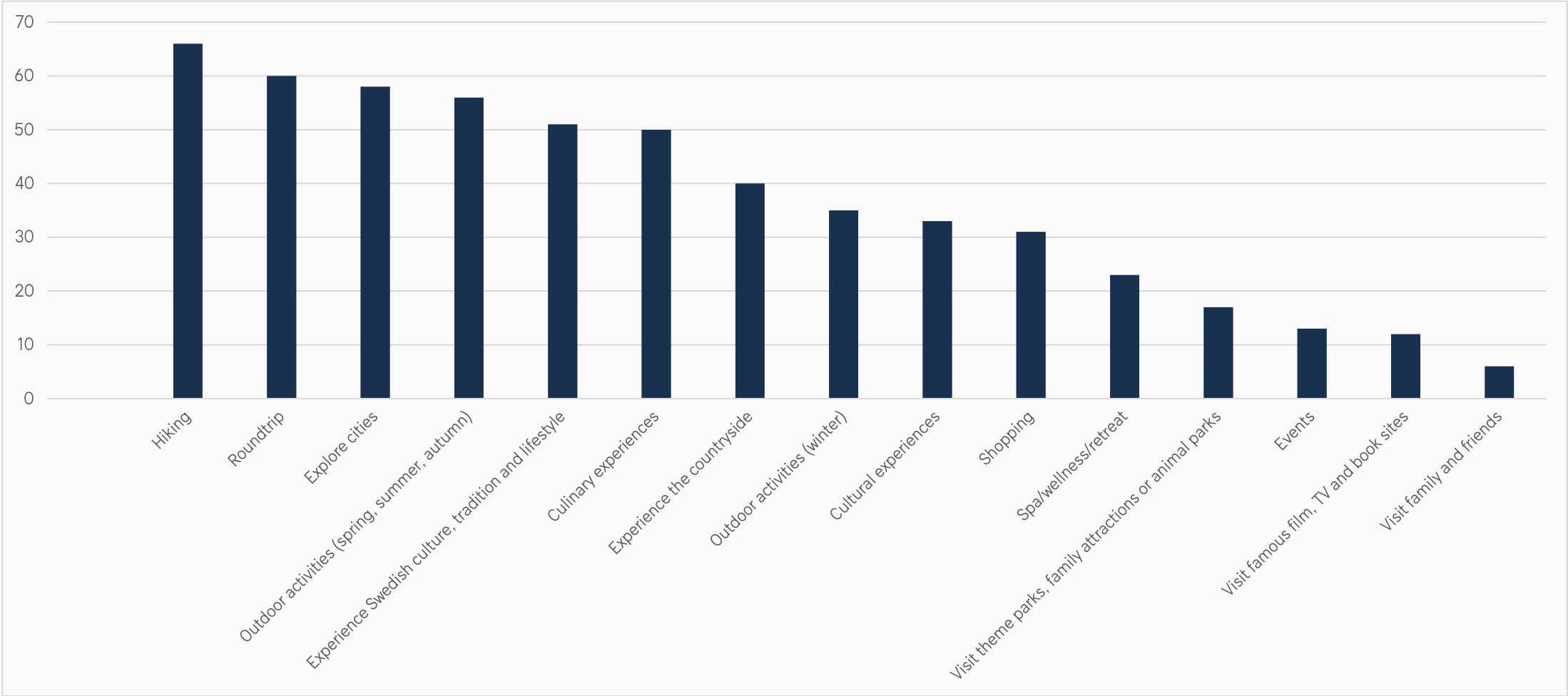
Tina Axelsson/imagebank.sweden.se

What kind of tour does the Dutch target group (want to) make to Sweden?

- Summer tours, focus on outdoor and nature experiences
- Round trip (with accommodation in different places)
- City break
- Camping- or cabin holiday
- Winter tour, focus on outdoor activities



What do they want to do in Sweden?



Målgruppsanalys 2024, Visit Sweden/YouGov, Nederländerna, Målgrupp: Globala resenärer med Sverigeintresse.

What about sustainability?

44% think about sustainability when choosing a holiday destination

Mentioned sustainable actions:

- Travel outside the main season
- If possible, take a train instead of a plane
- Avoid crowded places
- Use locally owned initiatives (activities, restaurants, accommodation, shops)
- Eat locally produced, ecological food



Planning and booking

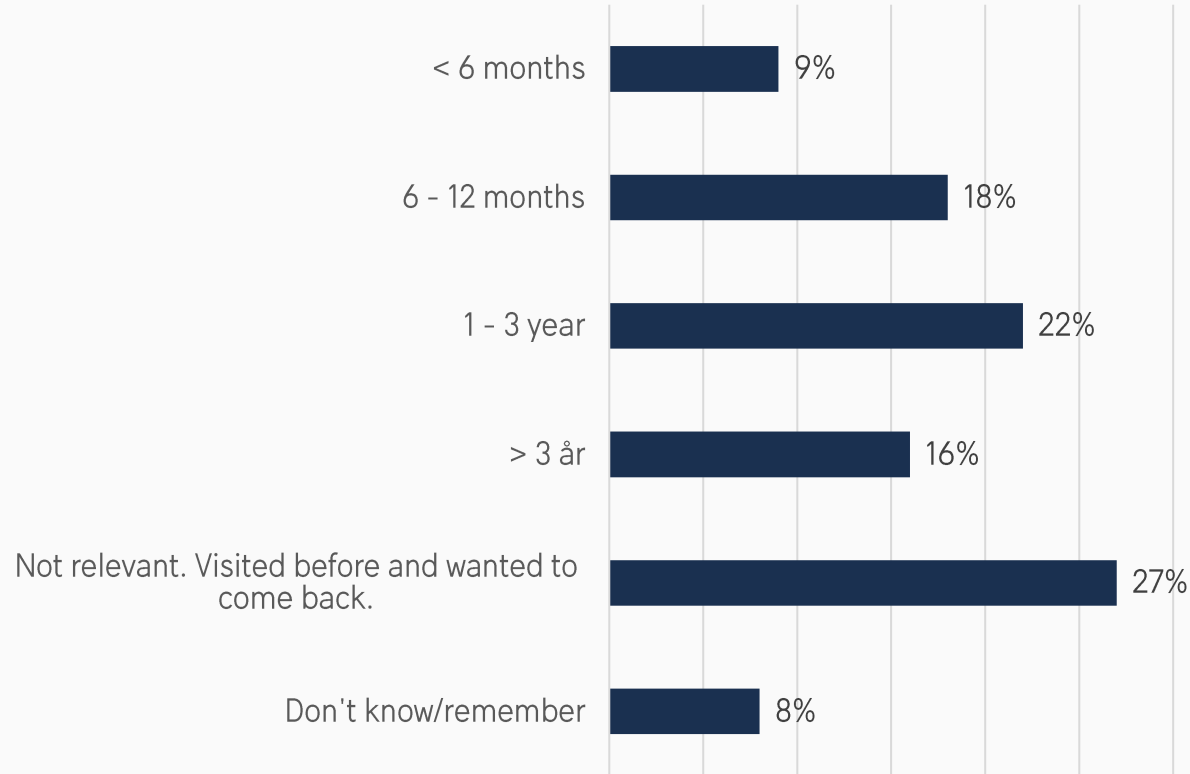


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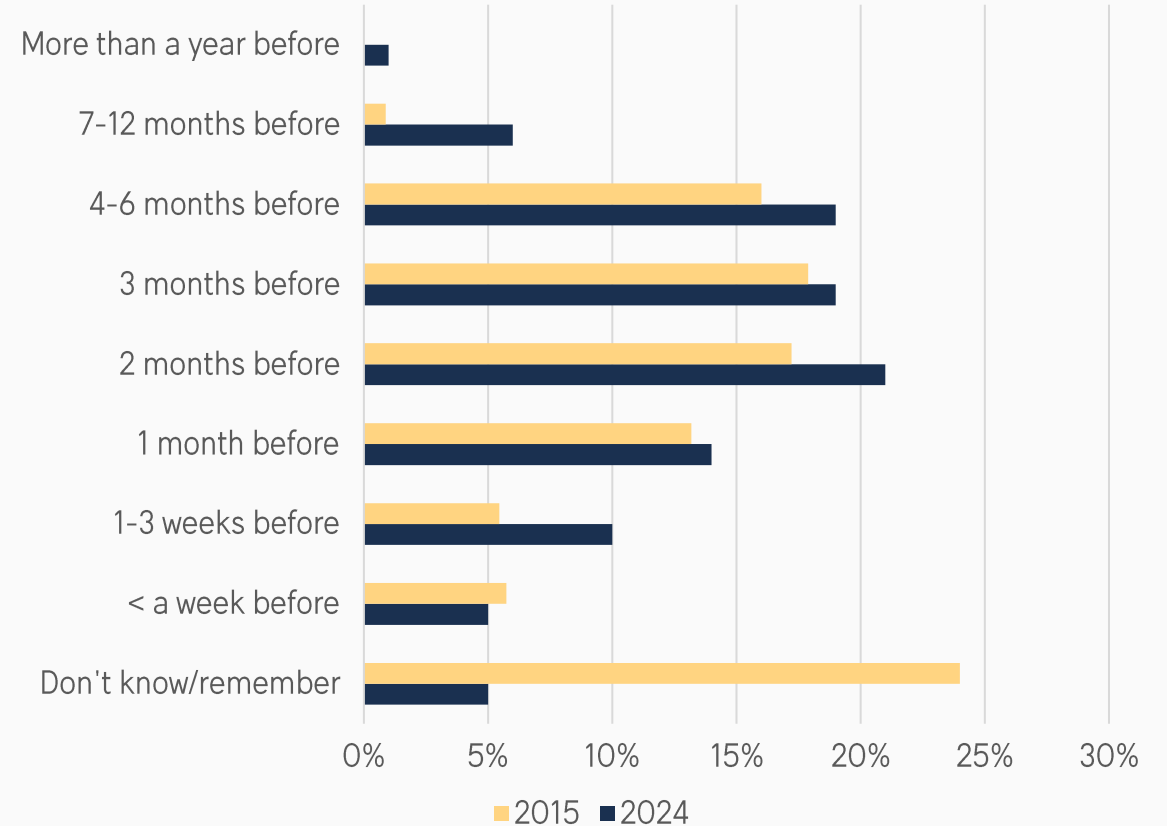
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Time from planning to booking

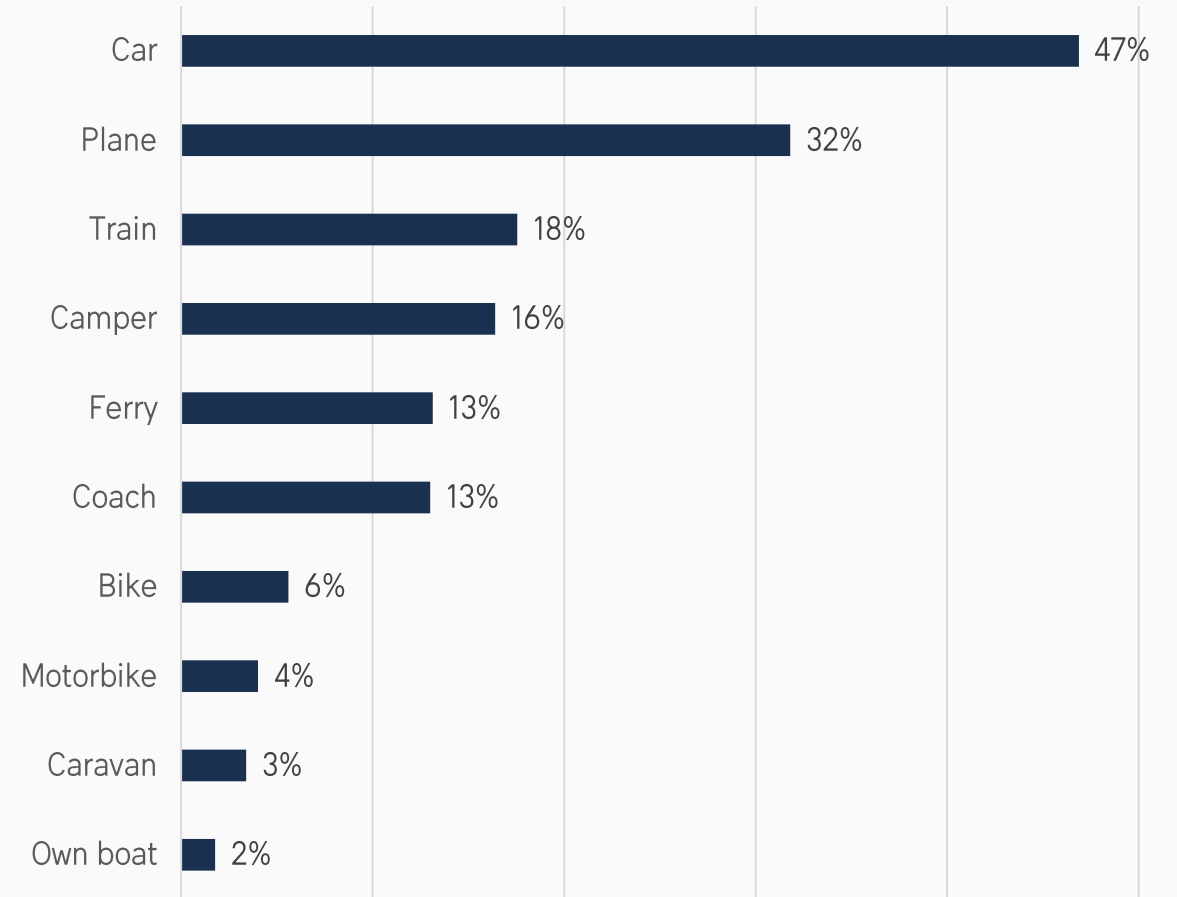
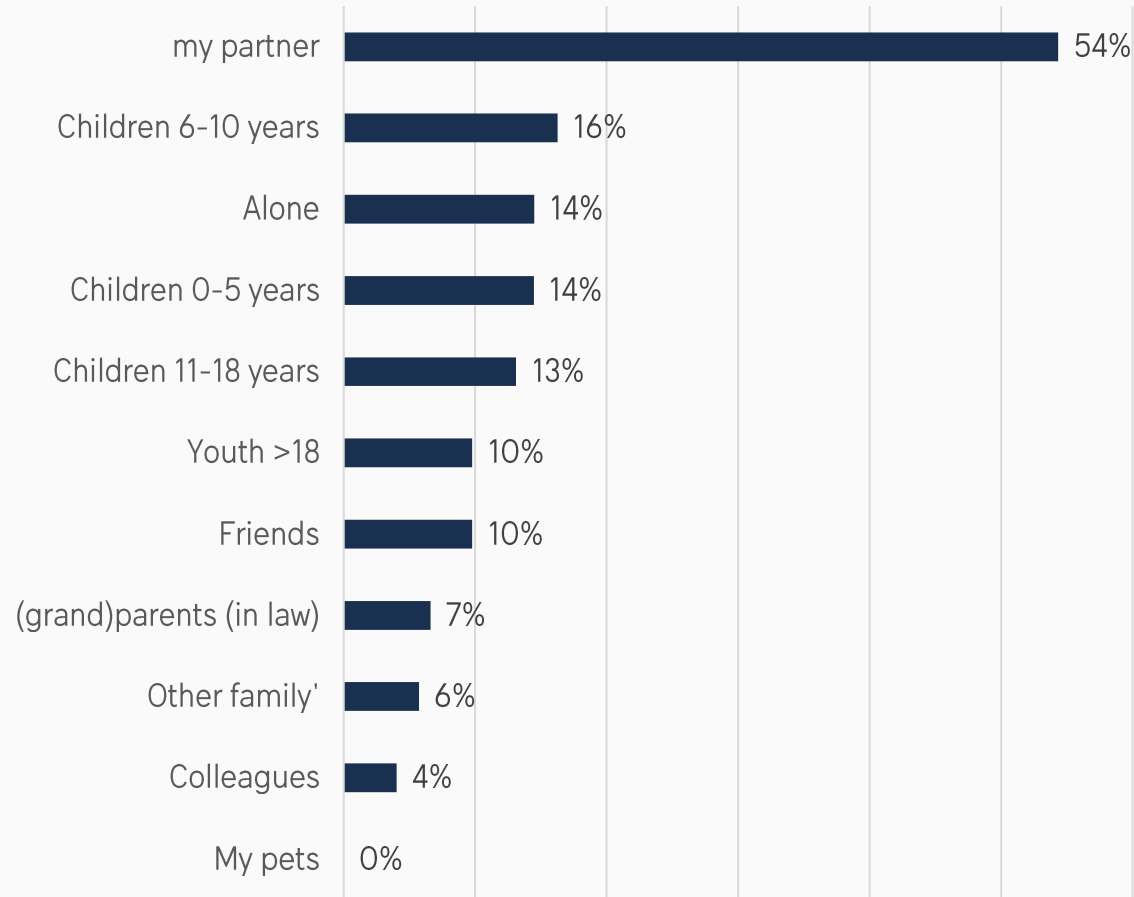
How long has Sweden been on your wish list?



When did you book your Sweden tour?

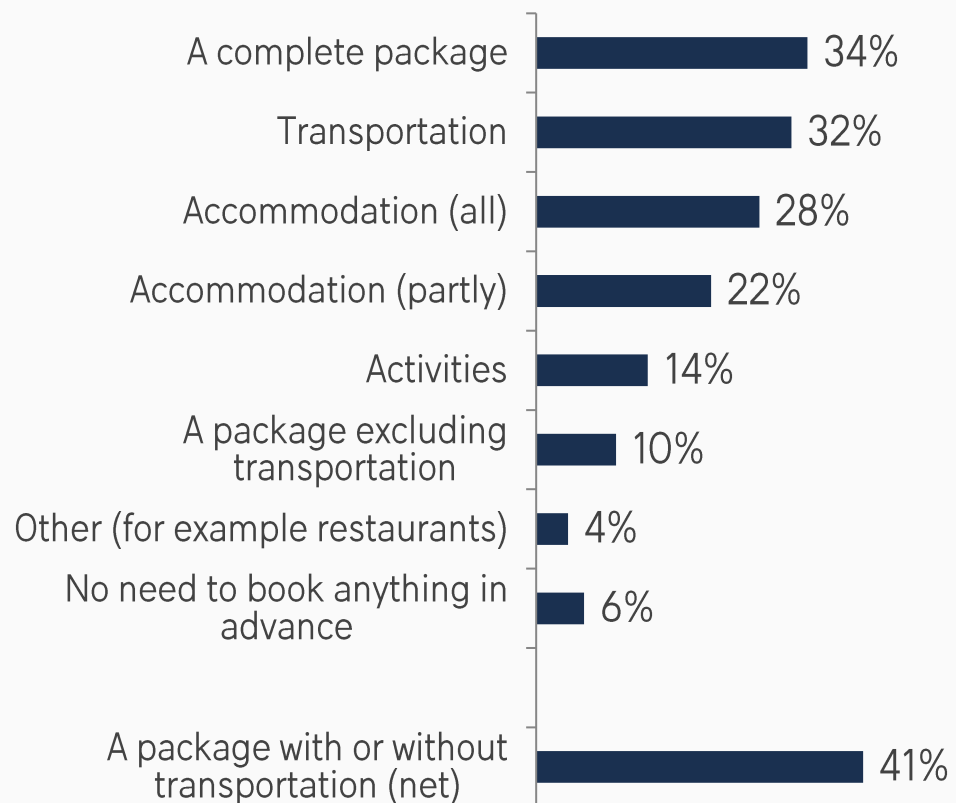


Travel company and means of transportation



Cooperation with Travel Trade is important

What would you like to book in advance?



- 32 % wants to book their Sweden tour through a travel agent.
- 59 % wants to book their Sweden tour themselves, through the internet.
- Of those who prefer to book a package, 35% want personal contact with a tour operator and 30% want to book through a booking portal.

Reasons for booking a package:

- Convenient
- Feels good to rely on experts
- Easy
- Safety / Insurance
- Prefer to pay in advance

Digital behaviour of the Dutch Global Traveller

- 588 700 tourism related Google searches for Sweden in 2024 (-9% compared to 2023)
- Dutch use recommendations of friends & family, earlier travelling experience and posts on social media to find inspiration about Sweden
- To find information, they use the homepage or app from travel agents, tour operators, booking portals or national tourism organisations
- 24% got interested of a destination through films/TV series
- 2 out of 5 Dutch check the internet for holiday tips every 3rd month
- 85% of Dutch global travellers check online reviews of holiday experiences (35% do this often)
- Dutch use Facebook, WhatsApp, Youtube and Instagram for inspiration. 6% has bought a trip through one of these channels before.

Källa: Digital Demand – Sweden's Touristic Demand, Bloom Consulting 2024
Marknad: Nederländerna
Källa: Målgruppsanalys 2024



Simon Paulin/imagebank.sweden.se

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Travel Trade: Contacts & Events

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Events

FAM-Trips

<https://traveltrade.visitsweden.com/participate/fam-trips/>

Travel Trade Events

<https://traveltrade.visitsweden.com/participate/travel-trade-events/>

A photograph of two women sitting at a wooden table outdoors. The woman on the left, with dark curly hair and a wide smile, is wearing a black and white striped shirt. She is holding a spoon and a small piece of food. The woman on the right, with long blonde hair, is leaning in and looking at the food. On the table are two white mugs, a vase with purple and pink flowers, and a plate of pastries. The background is a soft-focus garden with green foliage and purple flowers.

Welcome to Sweden!