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# NBTC Traces

**German tourism behaviour  
measured by survey and geo data**

September 1st 2022, adjusted in December 2022

Report written by GIM Traces. Insights from Outside

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Part 1.1: Heatmaps to indicate high frequented regions



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## Prolog

The aim of the study is to analyze the tourism behavior of the German population with a focus on the two German regions of Lower Saxony and North Rhine-Westphalia in the Netherlands.

A new method was chosen to analyze Dutch tourism, which allows results from a survey with the geodata of the survey participants, as well as other geodata from German tourists in the Netherlands, as well as master data from the participants who have made their geodata available. This triad of data was combined to obtain a comprehensive picture of Dutch tourism with regards to German tourists from NRW and Lower Saxony.

The content of the questionnaire-relevant content is about being able to describe the trip in the best possible way in terms of the motivation and further details.

In the second step of the study, heat maps were developed using geodata based on the survey participants and other visitors to the Netherlands with the aim of creating tourist hotspots or showing blind spots on the Dutch tourism map. This report shows these heatmaps.



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## Prolog

The survey was conducted on the basis of the GIM Traces Panel. The survey period was stretched from July 1st, 2021 to September 1st, 2021, and was then extended by another month to October 1st, 2021 with the aim of achieving a higher number of cases. At the end of this period n=164 have completed the questionnaire.

When evaluating the heatmaps, all visitors to the Netherlands were recorded, including those who did not take part in the survey but had previously traveled to the Netherlands in the period (2020-2021). A total of 612 maps were created using the geodata, which represent the individual journeys within the Netherlands. With the background of the Corona Pandemic and with the Netherlands as a high incidence area, there were fewer visitors, especially at the beginning of the study.

On the one hand, this explains the number of cases, which unfortunately fell short of our expectations. Due to a significant hacker attack on the GIM, there were major delays in the delivery of this report. Unfortunately, the maps and analyzes previously created could no longer be produced and had to be recalculated. Due to illnesses in this acute period of the pandemic, there were further delays. We would like to apologize again for this.



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### **Management Summary**

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## Management Summary

The good news, there is only good. Let's start with the general mood. The Germans love to travel to the Netherlands, be it for a day trip, a weekend trip or a holiday trip lasting several weeks. Whether to the sea or to the border region all segments will find their personal happiness in the Netherlands.

Overall satisfaction among travelers is very high at 90% level. The willingness to return is also extremely high and is 80% for a holiday.

Entry into the Netherlands is usually by car. Within the Netherlands, depending on the type of trip, people continue to move around by car, but also walking and cycling. Especially for longer vacation trips that include an overnight stay, the bicycle is used. Why the Germans like to go on holiday in the Netherlands also has to do with the fact that travel is so uncomplicated for many. Especially in a pandemic time, you can leave quickly and easily, if necessary. This is particularly advantageous traveling with children. The main motive for a holiday in the Netherlands is relaxation, quality time with friends and family, and the opportunity to simply unwind.



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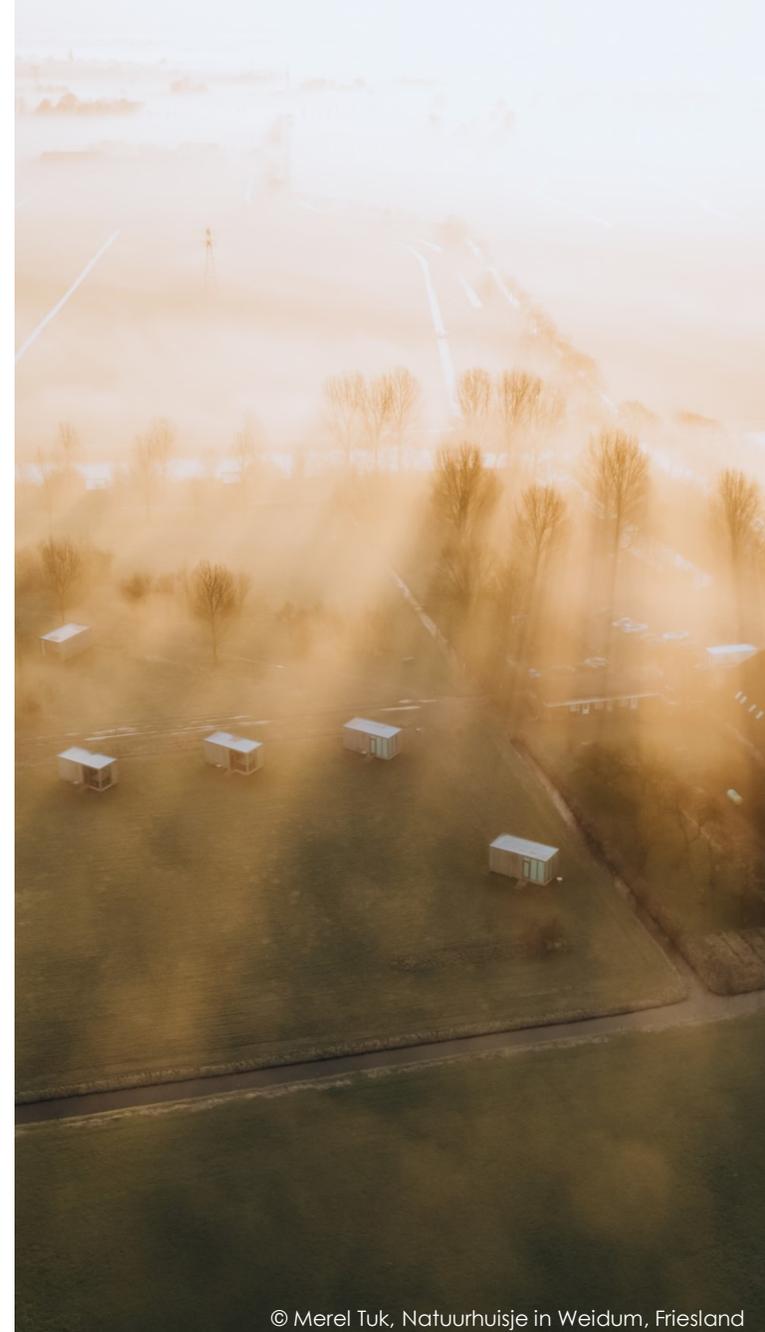
## Management Summary

Half of the guests come to the Netherlands as a reason for a holiday, followed by a day trip.

The relevant vacation areas are mainly on the coast of the mainland (66%). Amsterdam and other cities (44%), the hinterland is only visited by 27%, the analyzes from the geodata show in particular the regions along the border with North Rhine-Westphalia are vivid und often visited. Islands are visited by 10% of the guests. The top regions in the survey were Noord-Holland (23%), Zeeland (20%), Limburg (13%), which is also shown by the analysis of the geomaps. Two regions are particularly underrepresented in terms of tourism (see geomaps).



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## Management Summary

### Daytrips vs. overnight stays

In some points there are clear differences between these two trip types, in other points, however, they hardly differ.

The analysis of the geodata shows that day trips in particular take place in the vicinity of the border region to NRW. Excursions to Amsterdam, the islands and the coast often involve overnight stays. It is therefore not surprising that day trips are made much more frequently by residents from NRW.

The journey to the Netherlands is mostly by car, for day trips the rate is slightly higher at 86% than for trips with overnight stays (80%). If you are in the Netherlands, you use the car less for a day trip and hardly a bicycle compared to an overnight stay. The actual activities during the day trip are shopping (67%) and "eating out" (51%). These are also the top activities for overnight visitors, but they are also more likely to go to the beach (61% vs 28% (day trip)) and visit other cities more often. Overall, nature activities are more important for overnight visitors.



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## Explanation Heat Maps

Heat Maps:

The heat map is a form of representation for the visualization of data. This form of representation is called a heat map because the colors that a thermal imaging camera generates are traditionally used. In this case, the travel behavior was visualized on a map with a heat map.

The overall we could generate Heatmaps with the data of  $n=612$  journeys that were accumulated from 01.01.2020-01.10.2021.

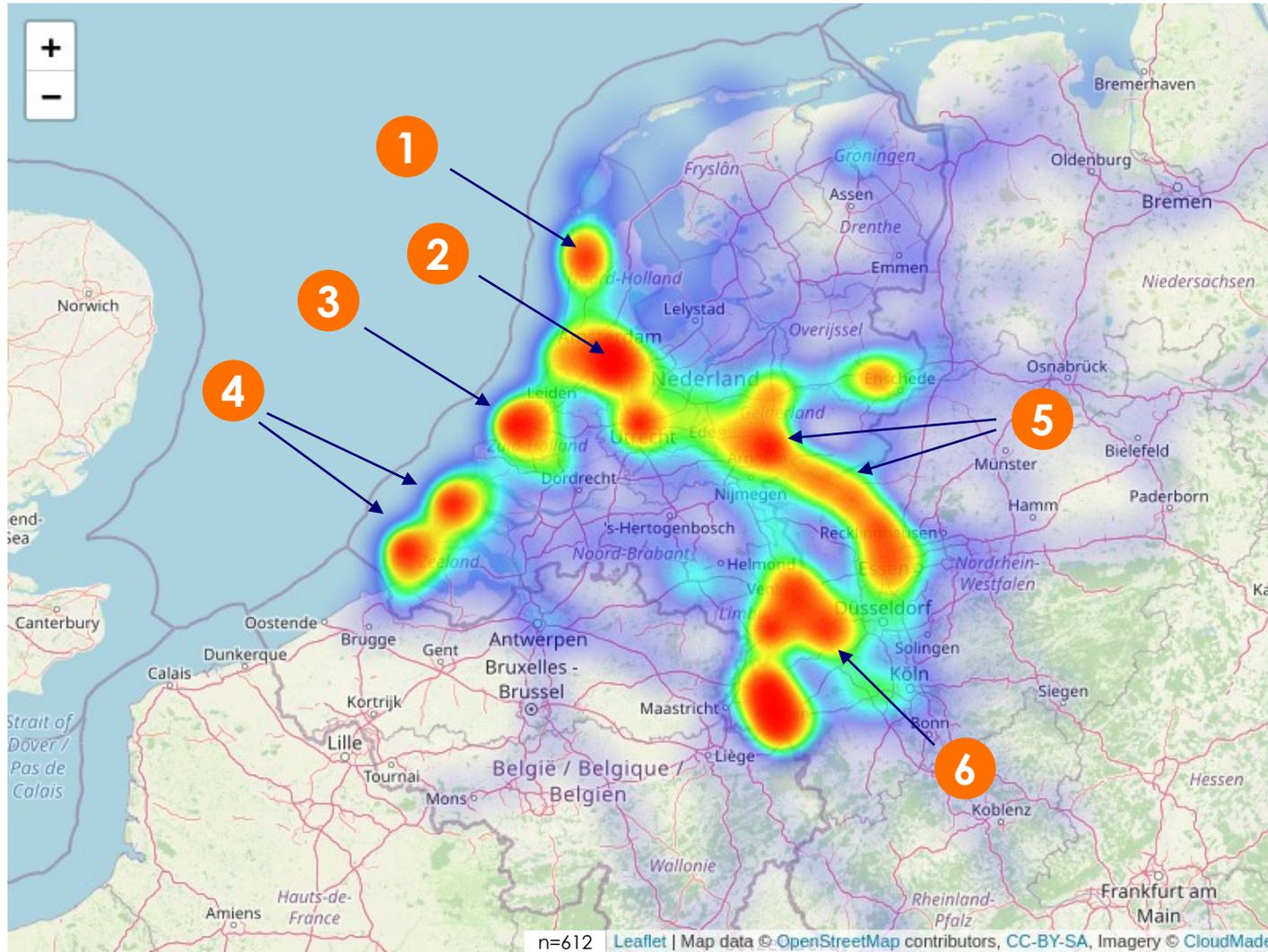
How a heat map works:

The more movements on the map the darker is the red on the map. Usually the more people move around in the same area the darker is the red, however this could also occur due to relatively few people that move around disproportionately much. Therefore we took a closer look at each heat map generated and analyzed the exact amount of unique people that moved around in that area.



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# Heatmap total

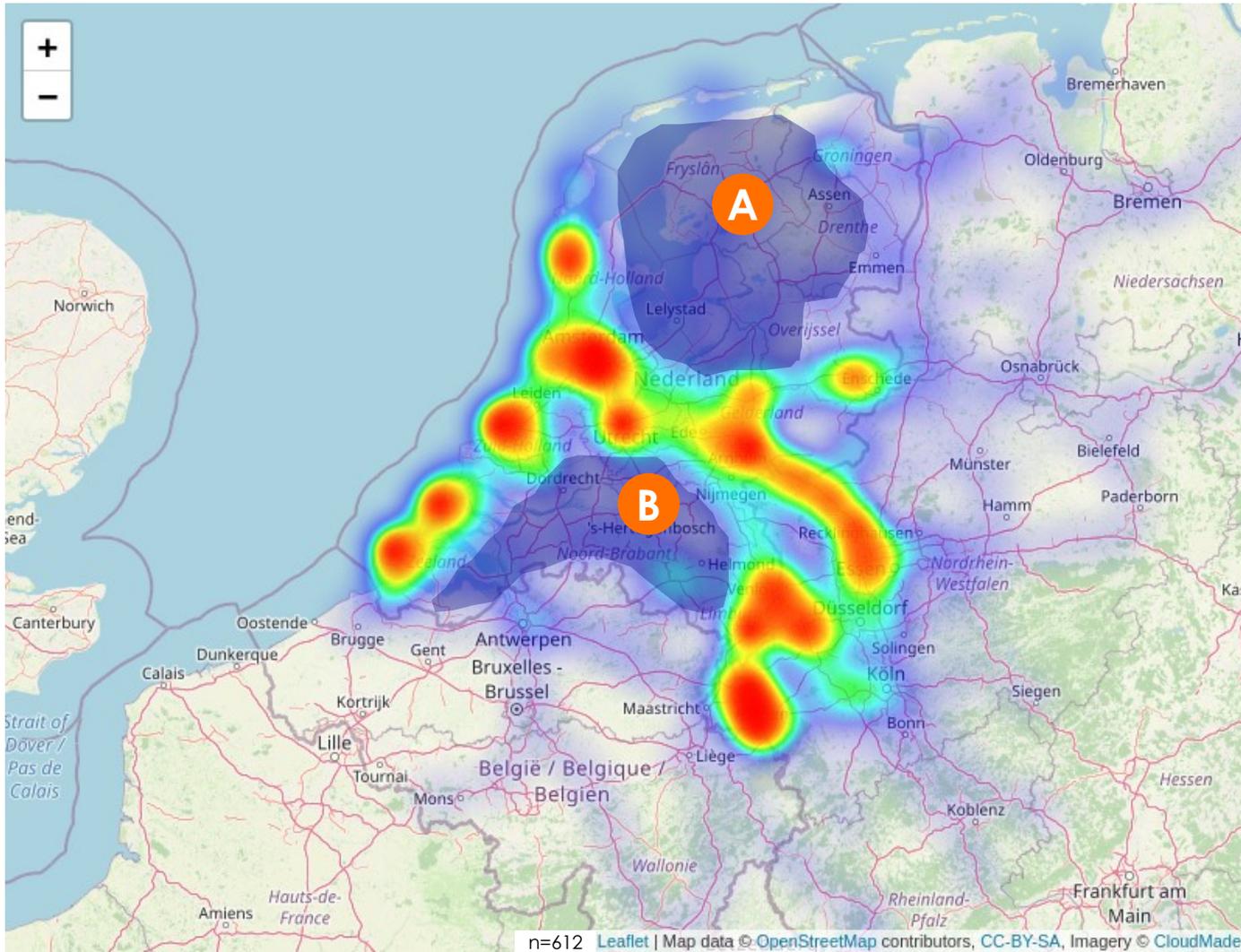


- 1 Noord-Holland
- 2 Amsterdam
- 3 Den Haag, Scheveningen & Vakantiepark Kijkduin
- 4 Zuid-Holland & Zeeland
- 5 Main travel motorway (A3) & Arnhem / Burgers' Zoo
- 6 Roermond & Designer Outlet



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# Heatmap total



The heatmap of the Netherlands clearly shows that there are regions frequently visited and others that are far less frequently visited almost blind spots on the map.

The regions from Noord-Holland along the coastline down south to the Belgium border is highly frequented. This region is especially visited by tourists spending their summer and autumn holidays at the coast. Further this region is also attractive for tourists spending a long weekend at the coast, or in some cases even for daytrips.

Amsterdam is also very well to identify on the heat map, as this destination is popular for a weekend trip or combined with a holiday nearby at the coast.

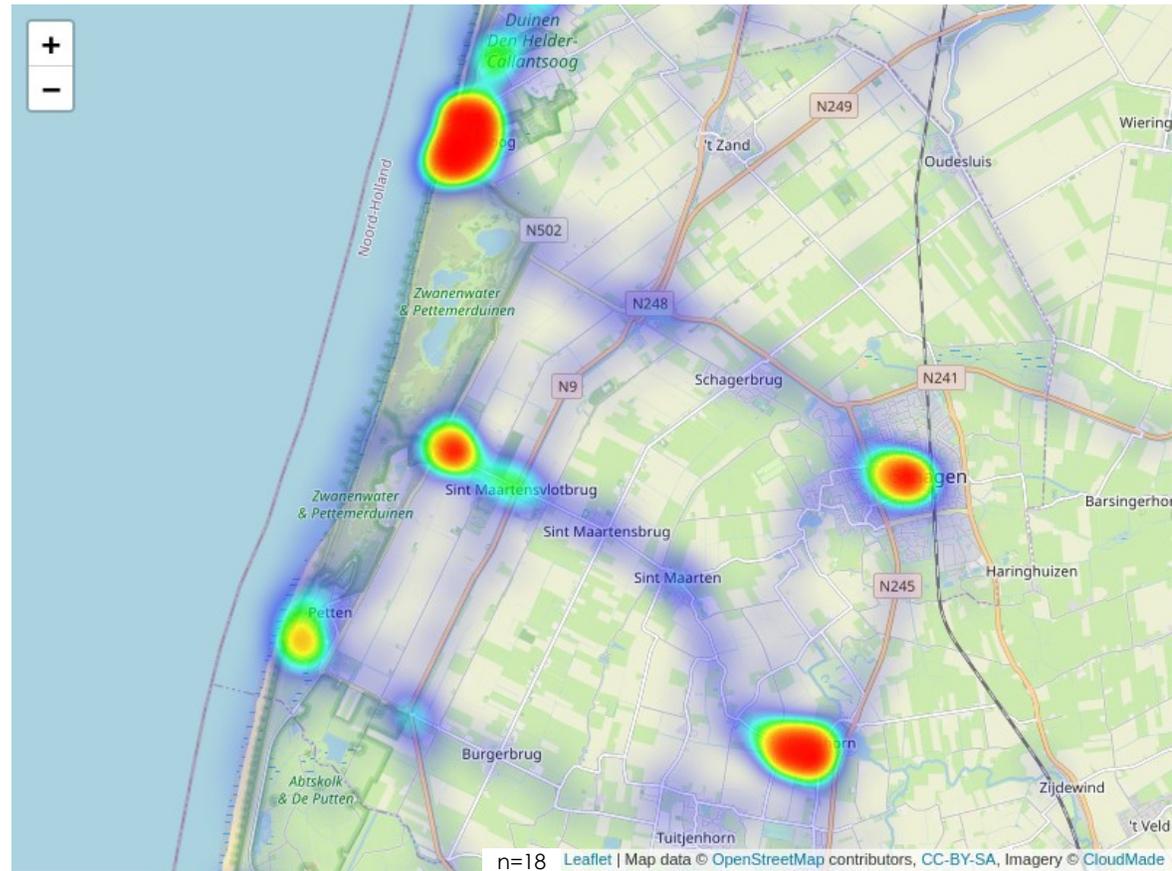
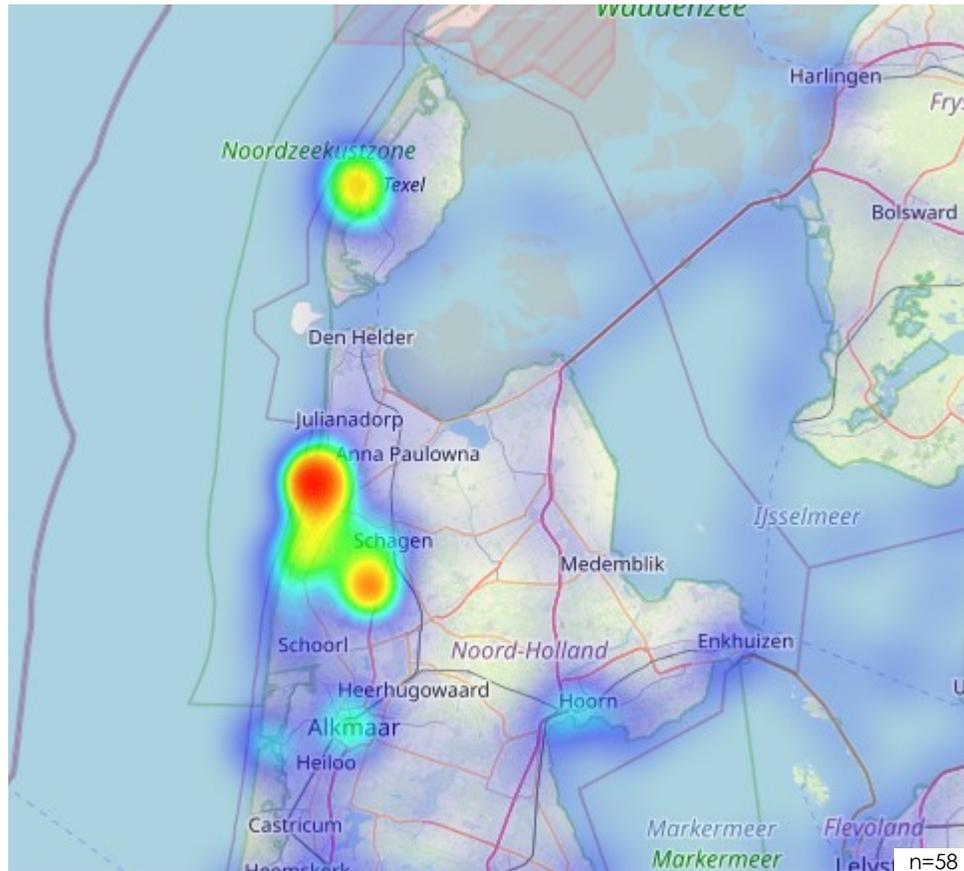
The border region to Germany is popular for day trips. Especially the common border region of the Netherlands and NRW in Germany is highly frequented, clearly stronger compared to the common border with Lower Saxony. On the one hand this can be explained due to the fact that with 17 million inhabitants, NRW is the biggest state in Germany. On the other hand this region has interesting shopping destinations such as Venlo and Roermond, but also University cities such as Enschede and Maastricht have a high attraction.

The areas marked "A" and "B" seem to be less relevant as tourist destinations.



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# 1 Heatmap Noord-Holland

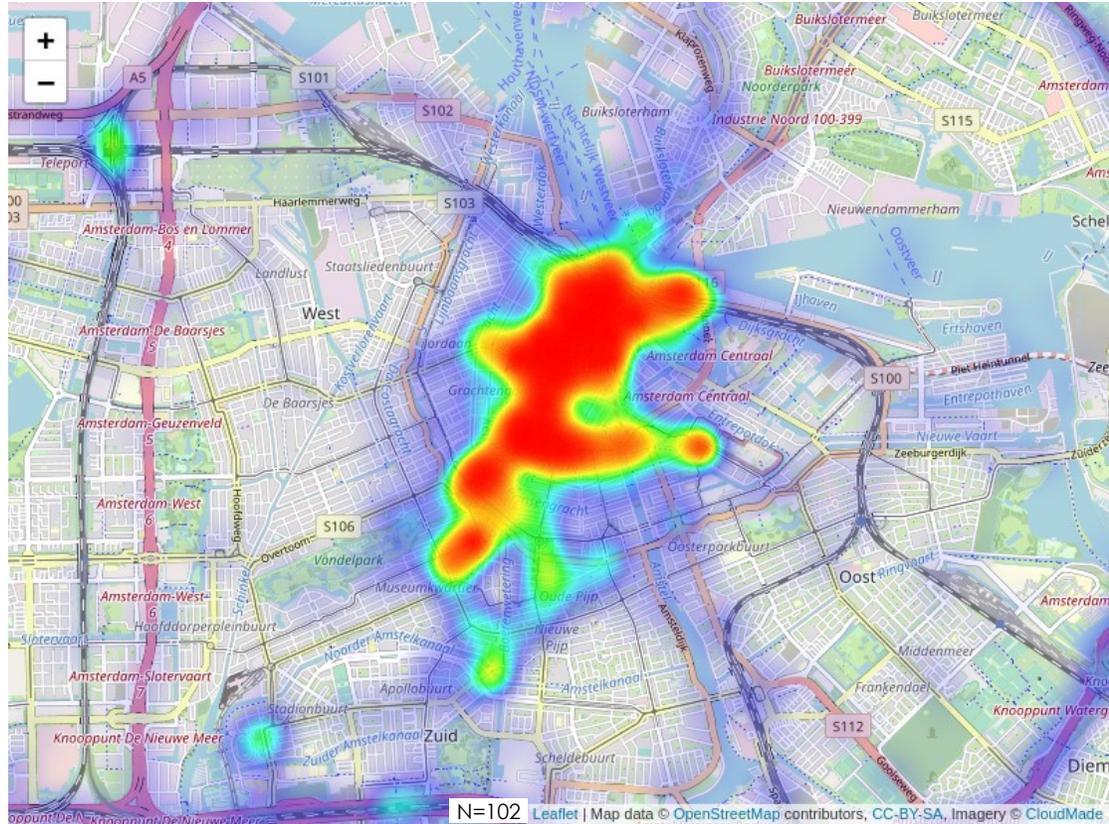


Visitors to the Netherlands are often drawn to the coast. The sea, the islands and the coastal regions have a magical attraction, be it for visitors for a weekend trip or even for more than a week in a bungalow on the beach, the coastal region is popular with all segments.



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## 2 Heatmap Amsterdam



The center of Amsterdam is a visitor magnet. Few visitors get lost outside of the main attraction zone. The left heatmap shows three spots outside the center, these are public transport hotspots. P&R seems to be used here besides the train stations.



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### 3 Heatmap Den Haag, Scheveningen & Vakantiepark Kijkduin

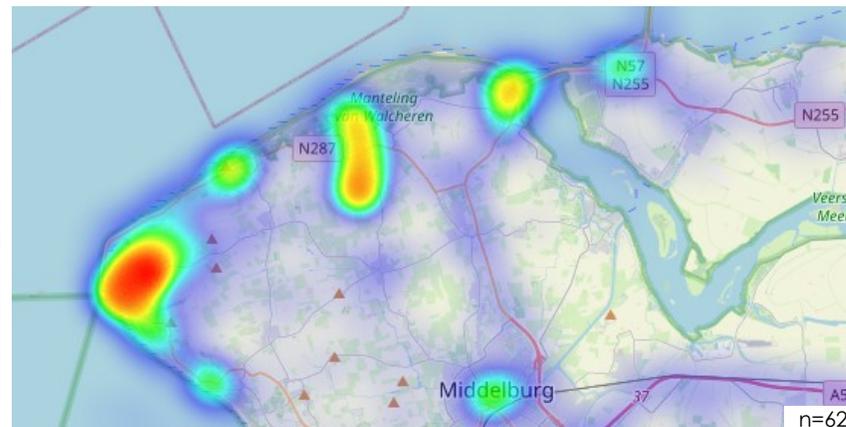
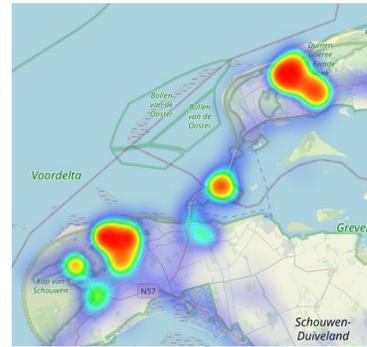
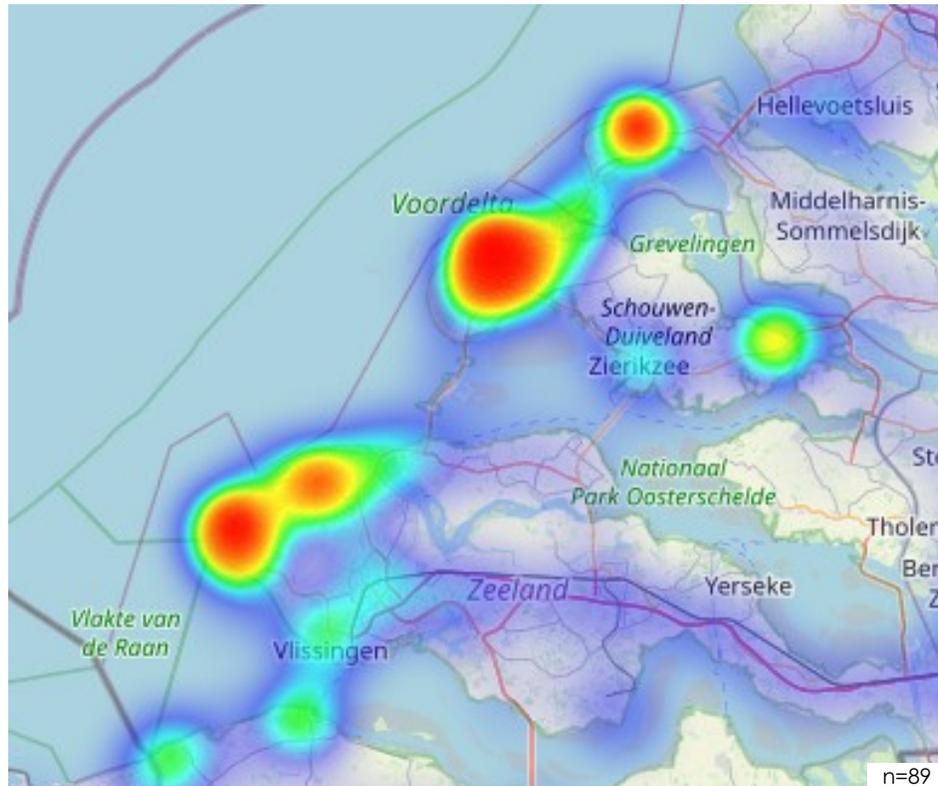


Visitors focus on the vivid streets and areas in the city and along the beach region in coastal villages.



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## 4 Heatmap Zuid-Holland & Zeeland

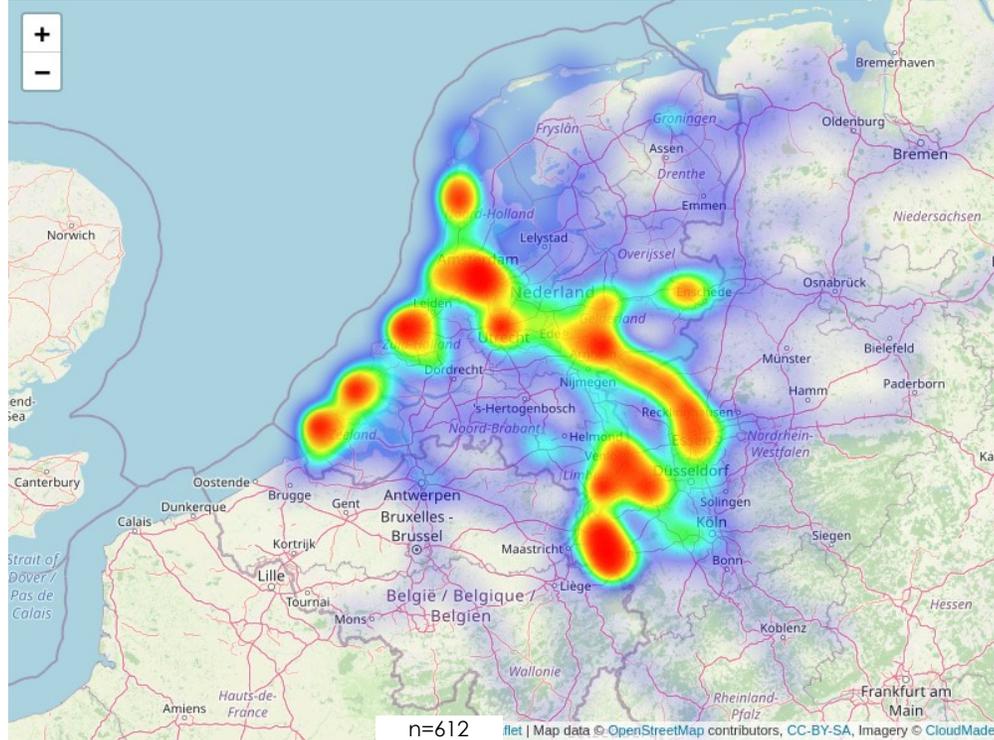


In quite a few cases it could be observed that the visitors in the coast region had a relatively small radius, even though they stayed for several weeks. This might be the case, as many visitors seek relaxation, that they directly get in the area where they have their accommodation, at the beach and maybe in the next village.



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## 5 Heatmap Main travel motorway (A3) & Arnhem / Burgers' Zoo

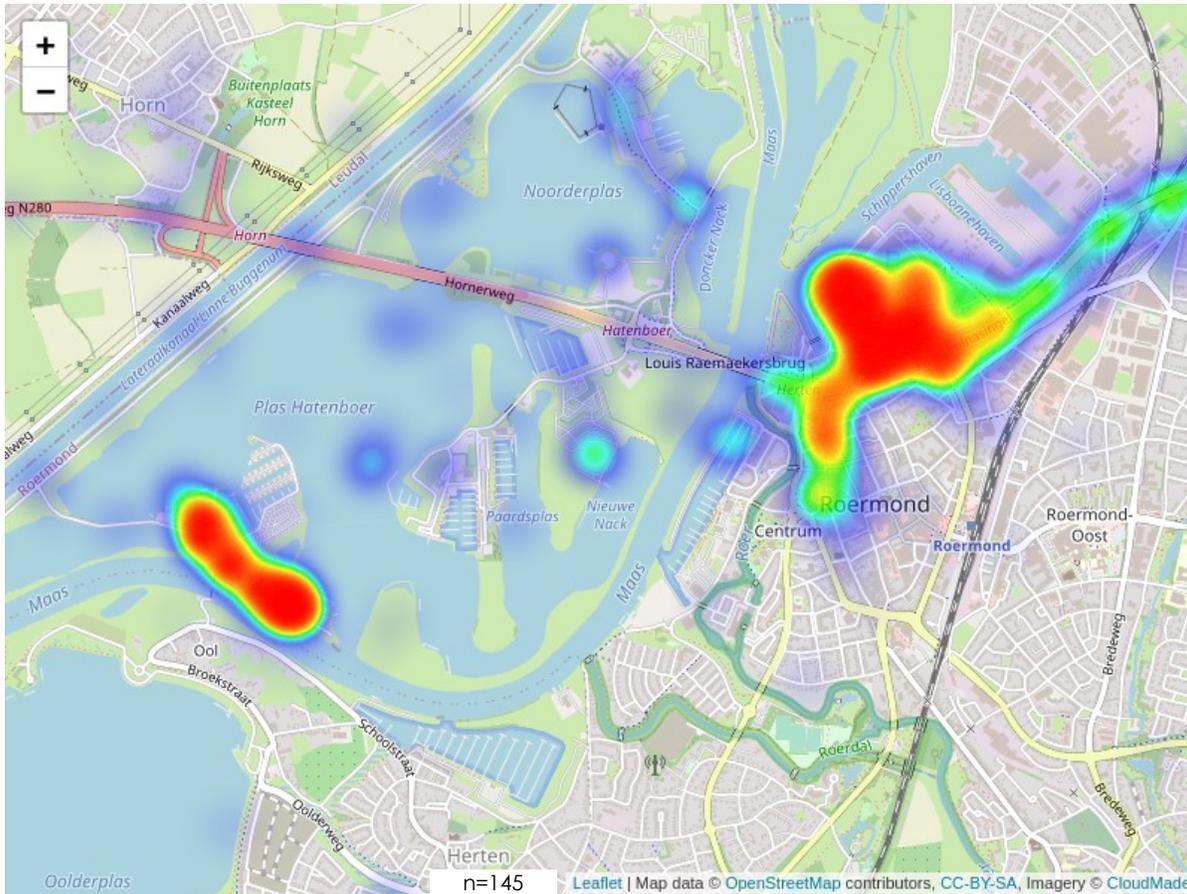


The motorway A3 is one of the major traffic arteries especially for visitors coming from or via NRW. Most visitors visiting the coast regions and islands arrive with their car, same for visitors of amusement parks. More distinguished traffic modality for Amsterdam.



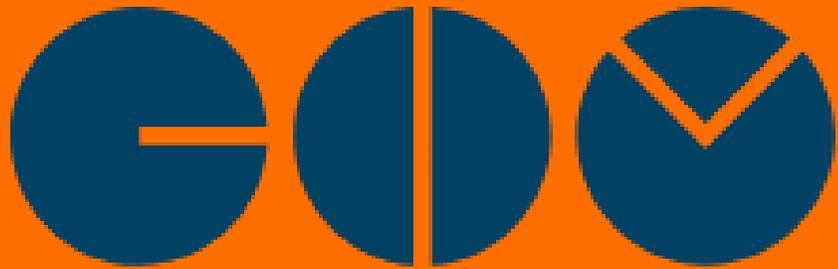
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## 6 Heatmap Roermond & Designer Outlet



A typical daytrip to the Netherlands is often directly related to shopping. The Roermond outlet city is very popular among visitors from NRW.





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