

NETHERLANDS BOARD OF
TOURISM & CONVENTIONS

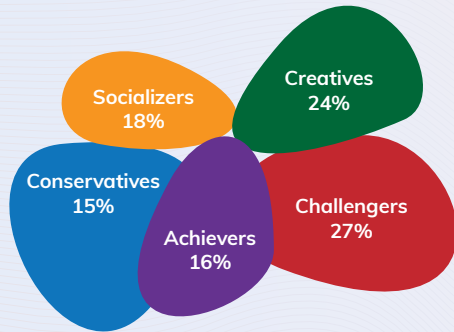
PASSPORT



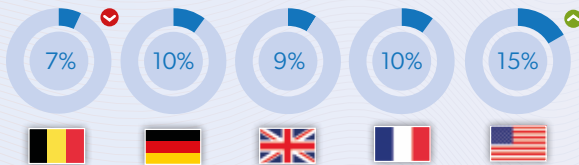
BEN

General information Conservatives

Size of segments worldwide



Size of Conservatives by country (of the five main core markets)



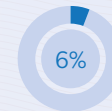
One in 10 residents in the five core markets belong to the Conservatives target group. This is a relatively small group compared to the other segments. This proportion is highest (15%) in the United States and smallest (7%) in Belgium.

- ▲ significantly higher than other segments
- ▼ significantly lower than other segments

Focus areas in Germany



North Rhine-Westphalia



Lower Saxony

Border region Lower Saxony has a significantly lower percentage of Conservatives compared to Germany as a whole. The border region of North Rhine-Westphalia is comparable with the whole of Germany.

Focus area in Belgium



Flanders

Flanders has a significantly lower percentage of Conservatives compared to Belgium as a whole.

Source: GLOCALITIES

Introduction Glocalities

We use the Glocalities model from market research firm Motivaction to get better insight into the target groups we are focusing on for developing the Netherlands as a sustainable destination. The Glocalities model is a segmentation model based on values, lifestyles, psychology and trends. The strength of this model is that it takes cultural differences into account.

We focus on valuable international visits for destination Netherlands. Germany, Belgium, the United Kingdom, France, the United States and China are our main country of origin markets. The model offers insight into different types of visitors, their lifestyles and what inspires them for a day or overnight visit to the Netherlands. The data in the passport is based on data from four of the five countries of origin (Germany, Belgium, France, the UK and US). The description of the personas is based on 2023 data, and additional research has provided more insight into the holiday behaviour of individuals within the different segments (2020). We gain insight into the wants and needs of five target groups and how this aligns with what the villages, cities and regions in the Netherlands have to offer.

The target groups were translated into five personas:

- Creatives **Sophie**
- Socializers **Kim**
- Conservatives **Ben**
- Achievers **Alex**
- Challengers **Monica**

This passport contains a description of the different target groups and the corresponding personas.



Name

Ben

Gender

Male

Age

62

Place of birth

Small village in the countryside

Residence

Medium-sized city, quiet,
lots of space, green.

Marital status

Married

Children

3 children (aged 30, 34 and 37)
and 3 grandchildren

Household composition

Married (to Julia)

Education & profession

Secondary education, now employed
as a carpenter.

Special life event(s)

Birth of grandchildren; family holiday
on Texel to mark his 60th birthday;
pride in renovating his house;
Christmas with the whole family.

AGENDAMonday

Work

Watch grandson at football practice

Tuesday

Take car to garage for servicing.

Work

Read, do puzzles, quiet evening at home

Wednesday

Work

Watch Champions League football!Thursday

Work

Garden maintenance

Watch favourite TV series

Friday

Day off

Do the weekly grocery shopping with Julia

Long walk with Julia and the dog

Puttering, tidy up the house, read a book

SaturdayHelp out at local football club in the morning,
prepare pitches, pour coffee, spend another hour
tidying up the garden.Family barbecue with children and grandchildrenSunday

Morning: visit elderly mother in nursing home

Afternoon: babysit grandchildren, they come in the
afternoon for lunch and board games

Hobbies

Going to a theatre, sporting event or (classical) concert. Music taste: gospel, classical and country.



Interesting/fun fact

Walks a lot with his wife. Family man. Church member. Likes to cycle on holidays with his own bike or a rental bike.

Google



Levi's



VISA

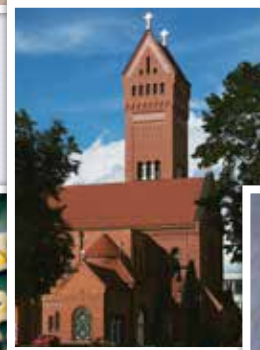


Favourite international brands

Conservatives value brands that exude a sense of trust, quality and tradition. They are thrifty and value products that last. They also appreciate brands that offer guarantees and reflect an organised and structured life.



CONVENTIONS
BOARD OF TOURS
CONVENTIONS



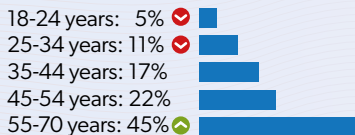
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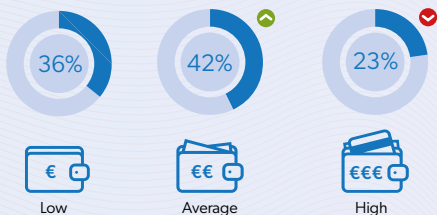
Career



Age

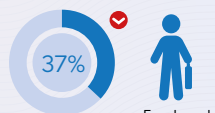


Income



🟢 significantly higher than other segments
 🔴 significantly lower than other segments

Work



🟢 significantly higher than other segments
 🔴 significantly lower than other segments

Examples of professions



Collection agency employee

Manager at equestrian centre

Deputy director of special education

Property management employee

Secretary

Volunteer

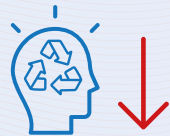
→ (includes a high proportion of pensioners)

Role of sustainability in daily life and during holidays



Conscious living

Critical of a superficial life and looking for a meaningful life. This is important for Conservatives, their score is significantly higher than for the other segments.



Environmental awareness

Try to live in an environmentally aware way. This is important to a lesser extent for this target group. This means there is room to influence the sustainable behaviour of Conservatives.

Although environmental awareness is of lesser importance to Conservatives, they are happy to abide by (local) rules. Their behaviour can be influenced by explicitly addressing them about local sustainability rules.



For Conservatives, environmental responsibility is not a very important value. There is no significant difference with the other segments.

Typical Conservatives in relation to sustainability

- + They do their best and follow the rules imposed on them by the government.
- + They tend to be frugal and consume consciously and in a limited way (stuff lasts a long time).
- + There is a positive view of the Netherlands and sustainability, mainly due to the good walking and cycling infrastructure.
- Are less conscious of sustainability on holiday than at home.

Perception of the Netherlands and the Dutch

Conservatives find Dutch people friendly and hospitable. The scores are comparable with the Socializers, Creatives and Achievers segments.

The Netherlands is also seen as open, but the other segments score slightly higher on that (except the Challengers).

The Dutch are labeled as tolerant and social by Conservatives. This is similar to the other segments, except for the Challengers.

Compared to other segments, Conservatives find the Dutch less innovative.



Conservatives see the Netherlands as a country (with)

-  Lots of history, culture and museums.
-  Lots of (clean) water and clean villages and towns.
-  Good infrastructure, where you can travel easily and quickly.
-  A relaxed atmosphere.
-  Many combinations of options during a visit, e.g. cities and nature.
-  Interesting visiting opportunities in different seasons.
-  Residents who speak their languages and are friendly and easy to communicate with.
-  A safe and suitable environment for a visit with families: child- and dog-friendly.

Holiday behaviour in general and the Netherlands in particular

Like Socialisers, Conservatives are less travel-minded compared to the other segments. Almost two-thirds have taken a holiday abroad in the past three years. Beach holidays, city breaks, sightseeing visits, nature holidays and tours are the most frequently undertaken types of holidays by Conservatives. This is not significantly different from other segments.

Despite Conservatives holidaying abroad less often, the Netherlands is considered a holiday destination by more than 8 in 10 Conservatives. A city break, sightseeing, nature holidays, cultural holidays and active holidays are the main types of holidays the Netherlands is considered for. Sightseeing visits score significantly higher compared to the other segments.



Eight in 10 Conservatives have considered the Netherlands as a holiday destination.

HOLIDAY BEHAVIOUR IN GENERAL



HOLIDAY BEHAVIOUR IN THE NETHERLANDS



According to the Conservatives, 'experiencing cultures' (54%), 'relaxation' (44%) and 'getting away' (37%) are the main reasons for travelling to the Netherlands.

The Conservatives score significantly higher only on 'experiencing cultures' compared to the other segments. On the travel motives of 'getting to know yourself', 'shopping' and 'doing business', the Conservatives score significantly lower.

When Conservatives go on holiday abroad, they are mainly interested in nature, sightseeing at the destination and heritage.

For holidays in the Netherlands, Conservatives also score higher on nature, sightseeing and heritage than the other segments.

- significantly higher than other segments
- significantly lower than other segments

Holidays in the Netherlands: accommodation, activities

Have visited the Netherlands for long/short holidays in last five years.



Belgium
Flanders



Germany
North Rhine-
Westphalia,
Lower Saxony



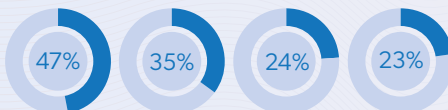
UK
London,
Southeast
England



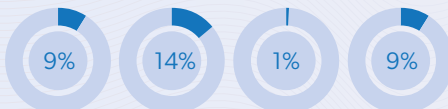
France
Île-de-France



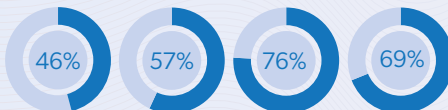
Short
break
(1-3 nights)



Long holiday
(4 nights or more)



Not visited



For a short break in the Netherlands, Creatives mainly stay in a hotel/guesthouse. In addition, the German Conservative also stays relatively often in a holiday home in a park.

Typical visit to the Netherlands

Travel group

With wife and dog

Travel destination

To get away together

Theme

Nature and cultural heritage

Holiday needs

No language barrier, values/
norms match own habits

Accommodation

House at a holiday park

Activities

Day at the beach, walking/
cycling, cooking for
themselves, bringing own
lunch, eating fish

Spending habits

Value for money, own car

Behaviour

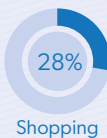
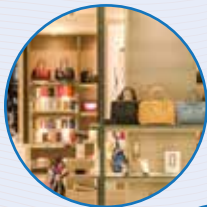
Conservatives do not easily
adapt their behaviour to local
customs and culture. They stick
to what they know and how they
do things at home (e.g. eating
dinner at same time).



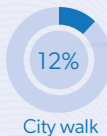
Day trip to the Netherlands: activities

Day trips to the Netherlands take place almost entirely from Belgium and Germany. Day trips from the UK or France are an exception. Amsterdam is a primary destination for day trips to the Netherlands, in addition to the border regions.

During a day out in the Netherlands, shopping is the most important activity, followed by a city walk (12%), market visits (10%) (among Belgians and Germans).



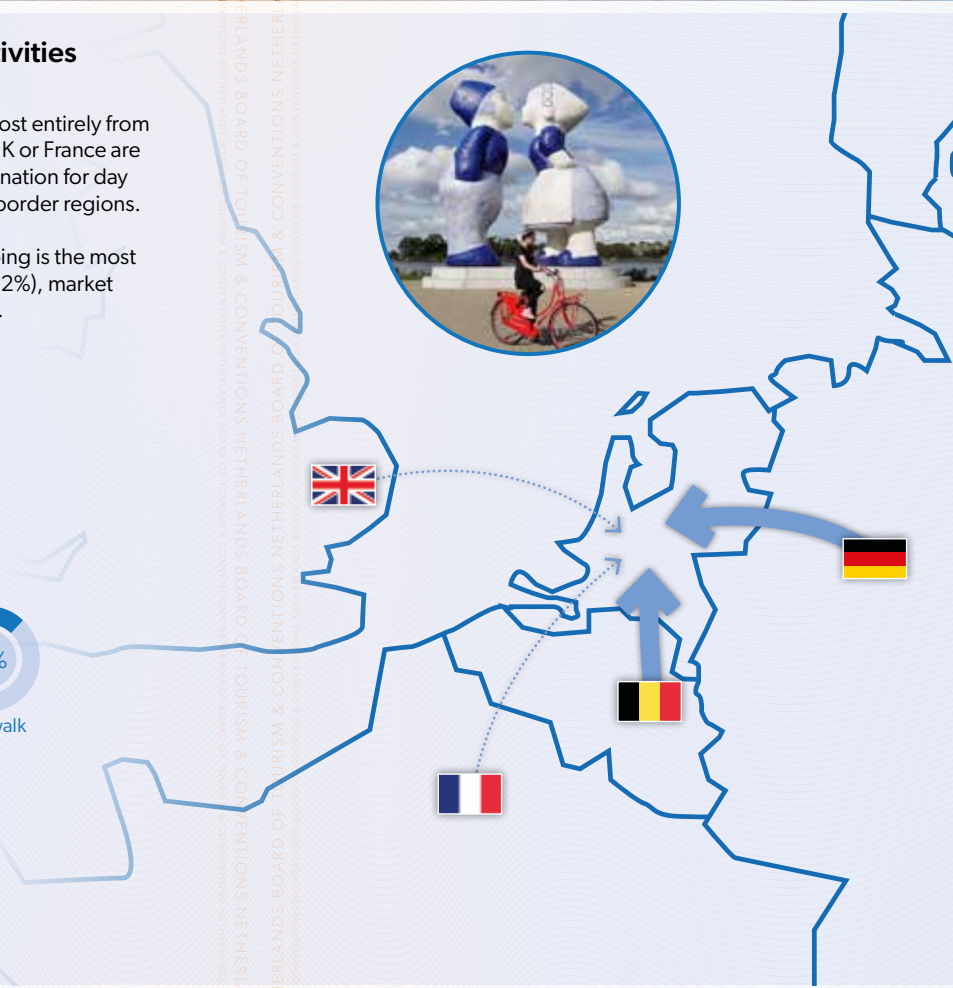
Shopping



City walk



Market visits



Media use



Social media

- Facebook
- WhatsApp ✓
- YouTube
- Instagram ✓
- Pinterest ✓

In general, Conservatives are less likely to use social media. The platforms they use regularly (Facebook, YouTube), they use on average relative to other segments.

TV

The top three main TV channels for Conservatives.








 België	 Duitsland	 VK	 Frankrijk	 VS
VTM ✓	ZDF	BBC1	M6	CBS
EEN ✓	RTL	iTV/Channel 4	TF1	ABC
Canvas	ARD	Channel5	France2 ✓	Discovery

- ✓ significantly higher than other segments
- ✓ significantly lower than other segments



Newspapers

Newspaper reading also varies by country and segment. Below are the three most-read newspapers by Conservatives in the respective country.

 België	 Duitsland	 VK	 Frankrijk	 VS
Metro ✓	Local news-paper ✓	Daily mail ✓	Local news ✓	Local news ✓
Het Laatste Nieuws ✓	Bild	Metro/The Guardian/	20 minutes	USA today
Het Nieuwsblad ✓	Der Spiegel	The Times	L'Équipe ✓	The New York Times
		The Sun	Le Monde	

- ✓ significantly higher than other segments
- ✓ significantly lower than other segments



Glocalities model overview

- 1 **Creatives, Sophie.** Open-minded idealists who consider self-development and culture very important.
- 2 **Socializers, Kim.** Fun-seekers seekers who love entertainment, freedom and family values.
- 3 **Conservatives, Ben.** Family-oriented, who value traditions/etiquette and like an organised life.
- 4 **Achievers, Alex.** Entrepreneurial networkers focused on family and community life.
- 5 **Challengers, Monica.** Competitive-minded, career- and money-driven, risk-taking and adventurous.



Colophon

Content

Glocalities / Netherlands Board of Tourism & Conventions (NBTC)

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As the national destination management organisation of and for the Netherlands, NBTC uses relevant knowledge and insights to give a national vision of tourism. On the basis of this vision, we inspire, connect and facilitate cities, regions, entrepreneurs and other stakeholders in and around the Netherlands, with the aim of making our country as liveable, loveable and valuable as possible for residents, visitors and businesses.

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