

NETHERLANDS BOARD OF
TOURISM & CONVENTIONS

PASSPORT



MONICA

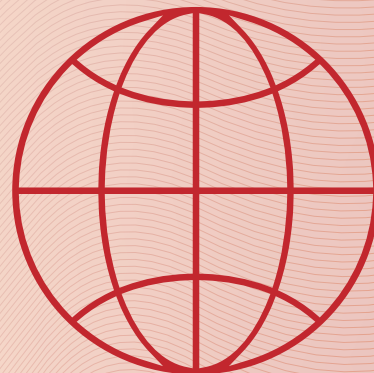
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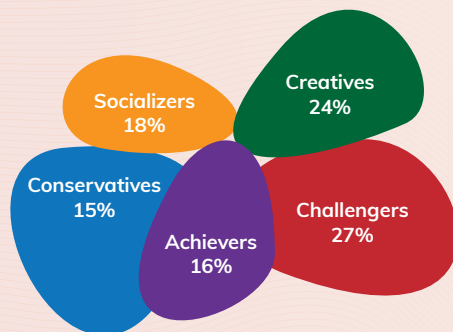


CHALLENGERS

NETC

General information Challengers

Size of segments worldwide



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



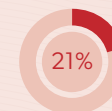
About a fifth of the residents of the five core markets belong to the Challengers target group. Compared to other countries, the proportion of Challengers is highest in the United States (27%). Germany (19%) and the UK (20%) have the lowest shares.

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

Focus areas in Germany



North Rhine-
Westphalia



Lower Saxony

In the German regions of North Rhine-Westphalia (20%) and Lower Saxony (21%), the proportion is similar to the national average in Germany (19%).

Focus area in Belgium



Flanders

The proportion of Challengers in Flanders is significantly lower (19%) compared to the national average in Belgium (23%).

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

Monica

Gender

Female

Age

32

Place of birth

Suburbs of a large city

Residence

A big city, where everything is close by and where she can blend in anonymously. She appreciates the many restaurants and many shops for shopping.

Marital status

Unmarried

Children

1 child (2 years old)

Household composition

Single mother with 1 child

Education & profession

She completed vocational education in retail. She is a shop manager at a perfume and cosmetics shop of a major chain, where she started working as an assistant and then worked her way up to shop manager.

Special life event(s)

Her parents divorced when she was 12 years old. As a result, she has a difficult relationship with her father. At 30, she accidentally got pregnant by her then partner. She now has limited contact with him.

Place of residence, home and transport

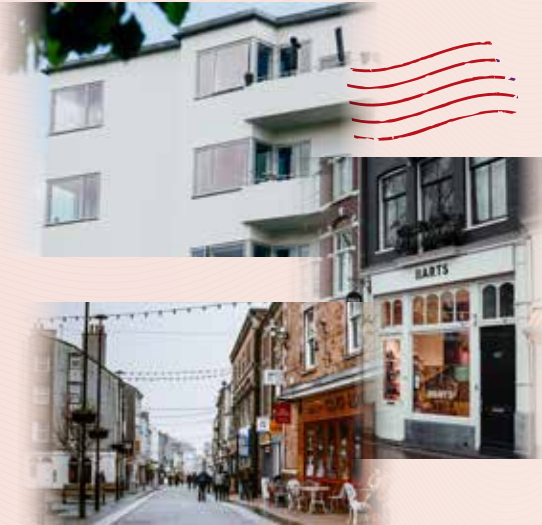
Lives in a big city with many amenities such as shops and restaurants nearby.

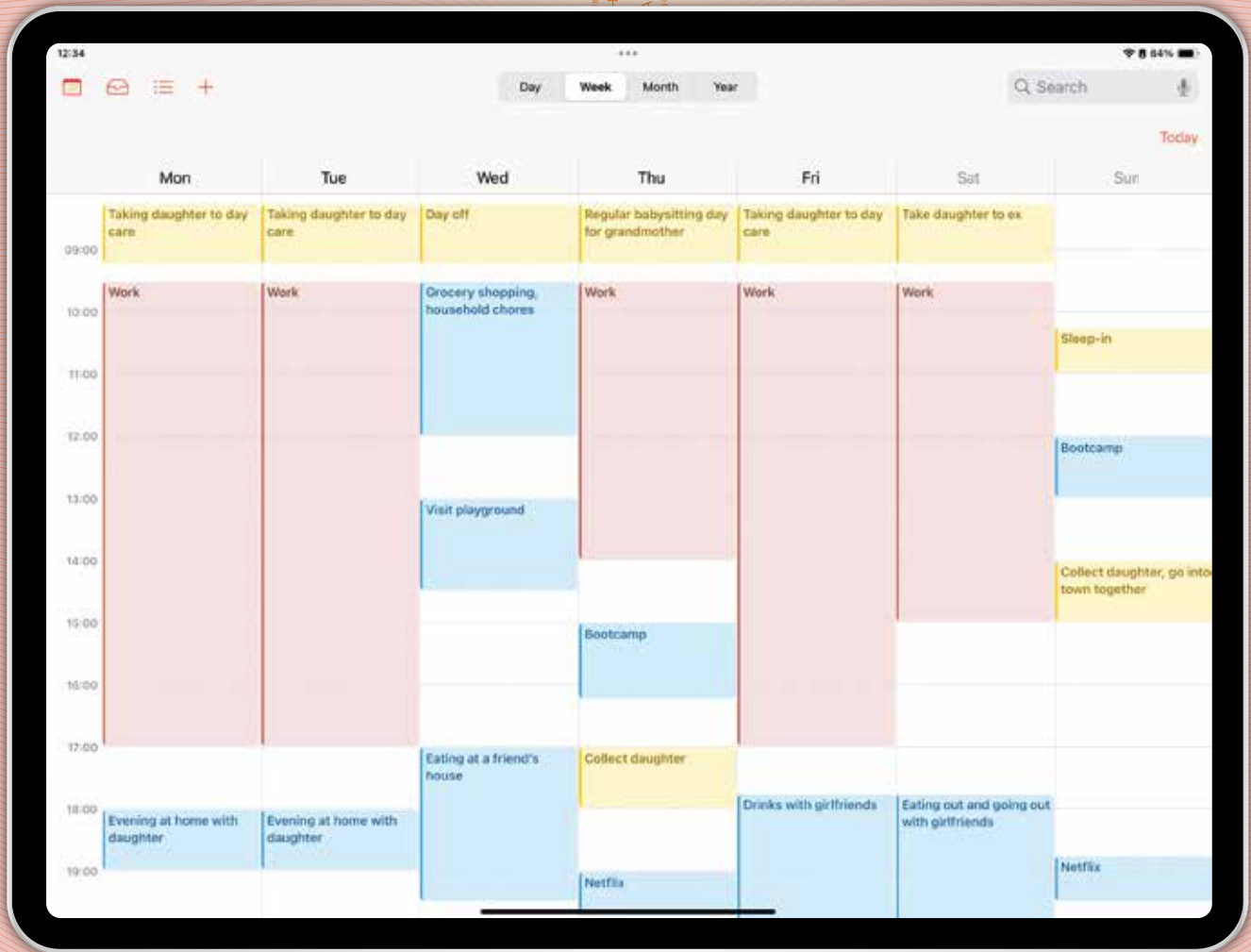
Lives in a 1990s rental flat.

Doesn't have a car.

Does a lot of walking or uses public transport or a shared car or scooter.

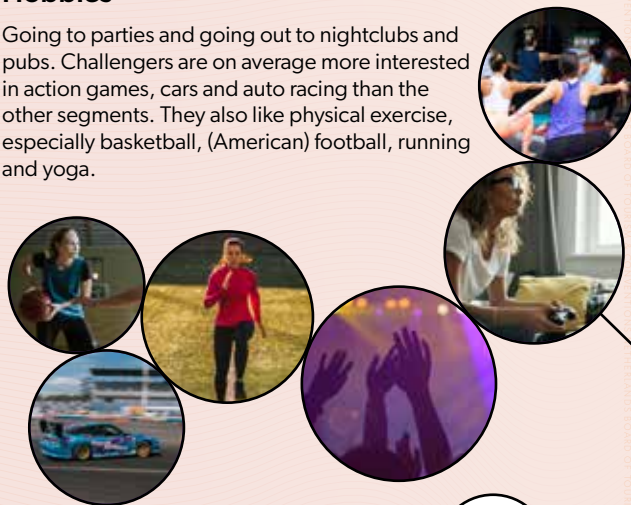
Sometimes borrows her mother's car for an outing.





Hobbies

Going to parties and going out to nightclubs and pubs. Challengers are on average more interested in action games, cars and auto racing than the other segments. They also like physical exercise, especially basketball, (American) football, running and yoga.



Favourite international brands

Brands that are intelligent, successful, glamorous, masculine, boldly exclusive, innovative, trendy and upbeat. Challengers are also interested in brands that have a history, fit their lifestyle and respond to values they find important.



Leisure time

Shopping, trips with her daughter to the playground, going to the park with friends, going out, dancing, drinking cocktails with her friends, girls' nights out with games (30 seconds), eating out, cooking together, Netflix, Disney+, socials (TikTok, Instagram).



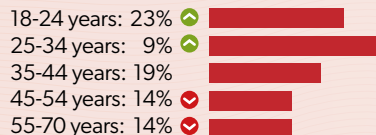
Interesting/fun fact

She used to dance at a high level in hip-hop videos, among other things. An injury forced her to give up this dream.

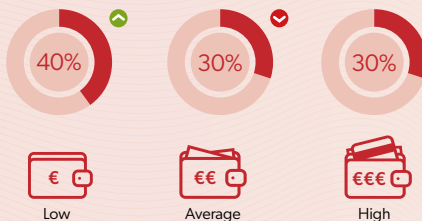


Career

Age



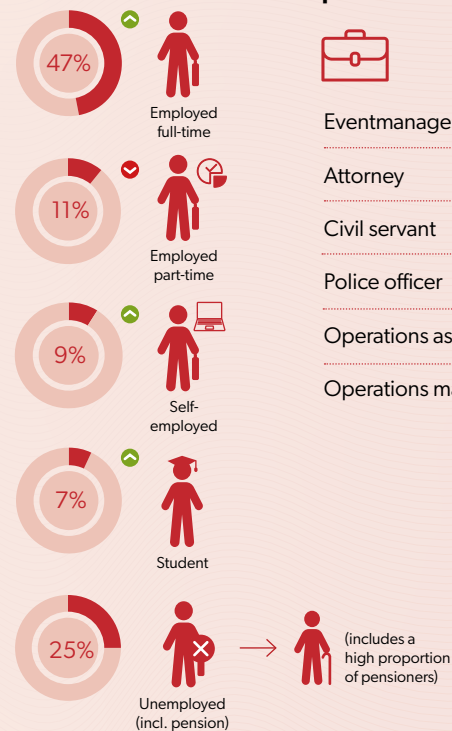
Income



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



Werk



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

Examples of professions



Eventmanager

Attorney

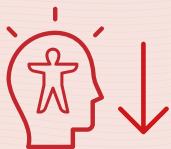
Civil servant

Police officer

Operations assistant

Operations manager

Role of sustainability in daily life and during holidays



Conscious living

Critical of a superficial life and looking for a meaningful life. Conscious living and sustainability play a limited role in Challengers' lives compared to the other segments.








Environmental awareness

Try to live in an environmentally aware way. On (environmentally) aware living, Challengers score lower compared to other segments. In addition, protecting nature and the environment is less important to them.

Challengers feel less responsibility towards the environment compared to other segments. They are also not influenced by trends related to sustainability.



Typical Challengers in relation to sustainability

-  Are somewhat aware of sustainability and try to pay attention to it in their daily lives, but are not actively engaged with it.
-  Not sure if the Netherlands is a leader in terms of sustainability, but see public transport and cycling as positive contributions.
-  In practice, cost, pleasure and convenience come before sustainability.
-  Sustainability is not a factor during holidays; cost and convenience come first.
-  Have limited knowledge of sustainable options, limited openness to them.

Perception of the Netherlands and the Dutch

Challengers see the Dutch as trustworthy, although Achievers score higher on this.

The Challengers also think that the Dutch are intelligent, these scores are comparable with the Creatives and Achievers.

The Dutch are also considered prosperous, ambitious and arrogant, with Challengers having the highest score here.

Challengers find Dutch people less friendly, welcoming and open than other segments.

Along with the Socializers, the Challengers find the Dutch less tolerant and internationally oriented than the other target groups.

According to the Challengers, the Dutch also score lowest on informal, pragmatic, exploratory and entrepreneurial compared to the other segments.



Challengers see the Netherlands as a country (with)



A pleasant, relaxed atmosphere with nice people who are straightforward.



Attractive opportunities for day trips and holidays.



Amsterdam as a well-known attraction, on which they base their image of the Netherlands.



Easy travel options (especially to and within Amsterdam).



Amsterdam as a destination to return to more often. Other cities may be considered once they know more about them.



Attractive cities. Nature and the coast interest them to a lesser extent.

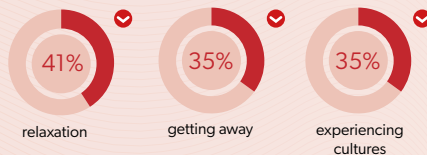


Holiday behaviour in general and the Netherlands in particular

In the past three years, three quarters of Challengers have taken a holiday abroad. This proportion is average compared to the other segments. As with the Conservatives and Socializers, holiday types include beach holidays, city breaks, nature trips, sightseeing visits and tours. These figures align with those of the other target groups.

85% of Challengers are considering the Netherlands as a holiday destination. The main holiday types considered by Challengers are beach holidays, city breaks, nature trips, sightseeing visits and cultural trips.

According to Challengers, the main reasons for travelling to the Netherlands are 'relaxation' (41%), 'getting away' (35%) and 'experiencing cultures' (35%). Compared to the other segments, Challengers score significantly higher on 'shopping', 'physical and mental vitality', 'getting to know yourself', 'reconnecting with family and friends' and 'doing business'. However, the target group scores lower on travel motives such as 'relaxation', 'getting away', 'experiencing cultures' and 'to disconnect'.



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



Challengers prefer gastronomy and sightseeing at the destination when on holiday abroad. Challengers score both significantly high and low on certain interests compared to the other segments. They score high on shopping, wellness, music, art and design and cycling. Challengers score low on nature, gastronomy, sightseeing attractions, the coast, heritage and architecture.

Prefer cities where there is a lot to do and see with a vibrant, energetic culture (shopping, hospitality, nightlife).

Stay in an (affordable) hotel or an affordable Airbnb.

Love going on holiday but need to keep an eye on costs and make conscious choices.

Go to the Netherlands once a year or once every two years for a short break.

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)

36%

63%

47%

43%



Long holiday
(4 nights or more)

17%

14%

16%

19%



Not visited

49%

27%

41%

46%



For a short break in the Netherlands, Challengers mainly stay in a hotel/guesthouse, followed by privately rented accommodation with the French and British.



When taking a long holiday in the Netherlands, Belgians are more likely to choose a house at a holiday park while Germans, on the other hand, are more likely to opt for a hotel/guesthouse followed by a cottage/cabin on a campsite.

Typical visit to the Netherlands

Travel group

Two girlfriends

Travel destination

Having fun, shopping,
exploring the city.

Theme

City life

Holiday needs

Escape the daily grind
and have fun/relax with
girlfriends.

Accommodation

Flat via Airbnb in central
Rotterdam.

Activities

Shopping, good food,
cocktails/wine on a terrace,
going out, dancing,
exploring the city (looking
for TikTok tips), capturing
and sharing it all on
Instagram and TikTok.
Boat trip on the Meuse,
museum visit.

Spending habits

Have to watch their budgets, but occasionally forget that.

Behaviour

Challengers adapt easily and are not too structured in their daily lives. They are open to local customs and culture. They are even more flexible on holiday than when at home.

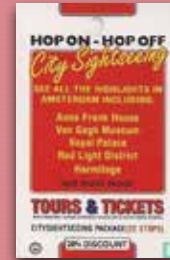


Day trip to the Netherlands: activities

Day trips to the Netherlands take place almost entirely from Belgium and Germany. Day trips from the UK or France are an exception. Challengers regularly take spontaneous day trips to the Netherlands. Challengers from the border regions make several day trips to the Netherlands per year. Their travel goals are mainly shopping, eating and exploring cities (with a focus on Amsterdam) and cities near the border, such as Venlo.



Hand luggage



Media use



Social media

Facebook ✓
 YouTube ⬆
 Instagram ⬆
 Whatsapp ✓
 TikTok ⬆

TV

The top three main TV channels for Challengers.



				
Belgium	Germany	UK	France	USA
EEN ✓	ProSieben	BBC1 ✓	TF1	HBO ⬆
VTM ✓	RTL	Channel4 ✓	M6 ✓	ABC ✓
VIER ✓	ARD ✓	iTV ✓	W9 ⬆	CBS ✓






⬆ 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 Challengers in the respective country.

				
Belgium	Germany	UK	France	USA
Het Laatste Nieuws ✓	Bild ⬆ Der Stern ⬆	Daily mail ⬆ Daily	L'Equipe Le Monde	The New York Times
Het Nieuwsblad Het belang van Limburg ⬆	Die Welt ⬆ Der Spiegel	Mirror ⬆ The Sun The Guardian	Le Figaro ⬆	Los Angeles Times ⬆ New York Post ⬆

⬆ significantly higher than other segments

✓ significantly lower than other segments

Do's and Don'ts and communication style

Do's



Using attractive people in communications appeals to this group.

Challenge the target group to get things done themselves.

It helps to let Challengers know that many others have gone before them.

Don'ts



Be cautious about transparency relating to alternative options that seem idealistic. Offer a clear, concrete path.

Avoid disruption and opportunity for rethinking, avoid change or innovative perspectives.

Communication style



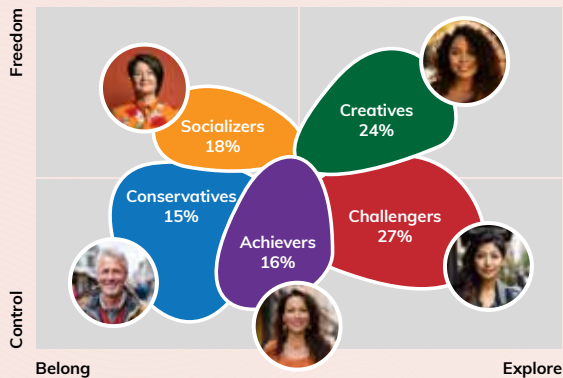
To reach this group, emphasise discounts and scarcity, keep communication consistent and involve attractive people in your message.

NOTES



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.



GLOCALITIES

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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