

Netherlands

Tourism in the economy

The importance of domestic and inbound tourism for the Dutch economy is increasing, with tourism growth exceeding the growth of the total economy in the last five years. In 2014, tourist spending in the Dutch economy grew by 4.1 % to EUR 68.3 billion. This accounts for 3.7% of Dutch GDP in 2014, compared to 3.5 % in 2013. Tourism related employment also grew by 2.5 % to 606 000 jobs in 2014, which equals 366 000 full-time equivalents (or 5.2% of total employment).

Inbound tourism is an increasingly significant source of income for the Netherlands. International visitor arrivals increased by almost 9% to 13.9 million in 2014, resulting in over 34.4 million nights spent in the Netherlands (up 8.4% on 2013), making 2014 another record year.

As in preceding years, Germany provided the highest number of international visitors, rising by 11.4% to 3.9 million arrivals. Growth was also recorded from Belgium (9.3%) and the United Kingdom (10.5%). Together these three countries account for 54% of international arrivals and 64% of overnight stays by international visitors. The strongest growth from outside Europe came from Asia (13.9%), with the number of Chinese visitors growing by 8.9%, lower than in 2013 (12.9%).

The Netherlands was a net tourism spender in 2014 with EUR 15.4 billion of tourism receipts (inbound) and EUR 17.4 billion of tourism spending (outbound).

In addition to foreign visitors, Dutch people spent more money on domestic tourism in 2014. Despite a slight drop in the number of domestic holidays (-1.8%), domestic tourism spending grew by 3.3% in 2014 to EUR 49 billion.

In 2014, 3.6 million visitors came to the Netherlands for business reasons, representing about 26% of all international visitors. The United Kingdom provided the highest number of business visitors, followed by the United States, Germany, Italy and Belgium. Although small in absolute numbers, more than half of the tourists from China came to the Netherlands with a business reason. International business visitors tend to spend more than general holiday makers, respectively on average EUR 1 035 per business trip and EUR 600 per holiday trip.

Tourism governance and funding

The Ministry of Economic Affairs is responsible for tourism policy at the national level. Responsibilities include:

- Partial funding of the Netherlands Board of Tourism and Conventions (NBTC) Holland Marketing, which is responsible for international marketing of the Netherlands and attraction of international conventions,

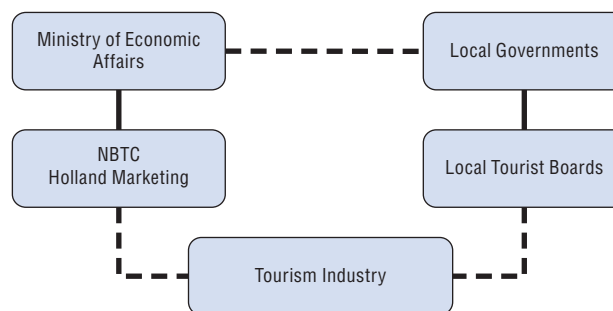
- Stimulating innovation, entrepreneurship and sustainability: the tourism industry can make use of a range of general policy instruments available within the Ministry,
- Stimulating synergy between nature, recreation and entrepreneurship,
- A networking approach for the hospitality sector,
- Acting as the first point of contact within central government for tourism industry associations and stakeholders.

Regional and local authorities are responsible for tourism policy at their respective levels. They deal with tourism matters such as funding the regional and local destination marketing organisations, which are responsible for domestic and international marketing of the relevant region or local destination, and with product development.

NBTC Holland Marketing uses a Private Public Partnership model to create the joint co-operation required to organise marketing programmes. This allows a variety of different partners to bundle their budgets and other investments around a shared goal or interest. They can be public partners (national, provincial and municipal authorities of regional tourist boards), public-private partners (marketing and promotional organisations) and private partners (businesses in the visitor sector and related sectors) in the Netherlands and other countries.

In 2015, the Ministry of Economic Affairs provided NBTC Holland Marketing with a grant amounting to EUR 8.3 million for the promotion of incoming tourism. Local governments such as provinces or cities can decide to allocate budget to the promotion of tourism.

Netherlands: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Economic Affairs, 2016.

Tourism policies and programmes

The policy of the Ministry of Economic Affairs focuses on promoting incoming tourism via the activities of NBTC Holland Marketing, improving the business climate for the hospitality sector by reducing the regulatory burden, enhancing the sustainability of the hospitality economy and promoting synergies between nature, outdoor recreation and entrepreneurship.

Two separate policy strands exist, one for the hospitality sector and one directed towards inbound tourism markets.

The hospitality sector has formed a high level group comprised of entrepreneurs, knowledge and marketing institutes and representatives of the Ministry of Economic Affairs. This high level group has drawn up an integral vision for the hospitality economy

with the ambition that by 2025, the Netherlands will be the country with the greatest diversity of experiences in the world. The aim is to offer excellent hospitality, a competitive sector and an attractive society. Progress will be measured based on a rating for hospitality, the position of the Netherlands on the Travel and Tourism Competitiveness Index, living conditions and the business climate index.

The strategic framework for this vision is based on three concepts:

- Find: Guests do not want to go searching but wish to find things and be surprised at what is discovered.
- Surprise: It is essential to provide excellent hospitality with an innovative choice of offers and concepts.
- Connect: Guests like to combine different experiences within the Netherlands and across geographical borders. Closer co-operation with companies and organisations within and outside the sector improves access to what is on offer and creates a surprising and innovative range of options.

Based on this vision, an action agenda has been defined for each of the following themes: innovation, human capital, technology, marketing, deregulation, nature, spirituality and social involvement.

Organisations representing the hospitality sector, such as Hospitable, as well as nature and consumer organisations have become involved in this networking approach.

Substantial and growing international competition make it necessary to continue to promote the Netherlands as a destination to the target group of potential visitors in existing and emerging markets.

NBTC Holland Marketing, in partnership with national and international stakeholders will work to further develop and implement the Holland branding and marketing strategy in which Holland City is a key concept, with interests taking precedence over places. In this concept the destination Holland is positioned as a single city, combining and connecting themes and areas of interest. In this way the capacity available in the Netherlands is used to the full.

Every five years, NBTC Holland Marketing conducts a detailed study on trends in inbound tourism. Destination Holland Future Vision 2025 outlines market developments for inbound tourism to 2025 and provides insights into prospects for potential growth.

The main opportunities can be summarised as:

- Gaining increased benefits from overall growth in inbound tourism,
- Maintaining a good mix of international arrivals, reflecting strong volumetric growth from European markets and percentage growth from China and elsewhere in Asia,
- Responding to growth in active senior visitors and new tourists, taking account of their different preferences,
- Meeting the needs of the Y generation in the business market. These are active doers, wanting to participate and take opportunities for self-development before, during or after a business event,

In order to realise this growth prospect, NBTC Holland Marketing's Future Vision 2025 outlines a number of pre-conditions:

- Introducing new, direct flight connections to emerging countries of origin,
- Putting in place a more targeted visa-issuing process,

- Realising maximum accessibility within the Netherlands,
- Creating room for hotel development in the Netherlands,
- Promoting the spread of tourism in time and space,
- Exercising restraint in introducing or raising taxes and levies,
- Allowing entrepreneurs room to innovate.

An events policy for the Netherlands

Netherlands Board of Tourism and Conventions (NBTC) events policy ties in with the strategic aim of promoting the spread of tourism across the country in time and space. Themes for the coming years include:

- 2015: Van Gogh 125 years of inspiration,
- 2016: Jheronimus Bosch 500,
- 2017: 100 years of De Stijl – 100 years of Dutch Design,
- 2018: Leeuwarden Capital of Culture.

The themes will be elaborated together with relevant stakeholders. The co-operation of the Ministry of Education, Culture and Science, Ministry of Foreign Trade and Development Co-operation, Ministry of Health, Welfare and Sport and Ministry of Infrastructure and the Environment is being sought in overseas promotion of sporting and cultural events.

Statistical profile

Table 1. Netherlands: Domestic, inbound and outbound tourism

	2010	2011	2012	2013	2014
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	17 708	17 740	18 120	17 490	17 176
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	94 000	91 760	91 960	93 000	86 000
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	10 883	11 300	11 680	12 783 |	13 925
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Germany	2 848	2 978	3 010	3 495 |	3 894
United Kingdom	1 556	1 508	1 614	1 680 |	1 857
Belgium	1 257	1 345	1 462	1 673 |	1 828
United States	1 223	1 320	1 323	1 337 |	1 431
France	669	666	642	680 |	725
Nights in all types of accommodation	..	..	..	31 771 |	34 424
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	18 430	18 560	18 628	18 093	17 933
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
Germany	..	..	3 400	3 183	3 373
France	..	..	2 798	2 677	2 606
Spain	..	..	1 796	1 759	1 856
Belgium	..	..	1 811	1 766	1 425
Austria	..	..	1 233	1 178	1 113
TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	14 127	15 052	15 737	17 060	15 430 p
International travel receipts	9 718	10 308	10 697	11 731	9 749 p
International passenger transport receipts	4 409	4 744	5 040	5 329	5 681 p
Outbound tourism					
Total international expenditure	15 019	14 949	15 931	15 644	17 364 p
International travel expenditure	14 807	14 748	15 707	15 428	15 382 p
International passenger transport expenditure	212	201	224	216	1 982 p

.. Not available; | Break in series; p Provisional data

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Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933320287>


Table 2. **Netherlands: Enterprises and employment in tourism**

	Number of establishments	Number of persons employed				
	2014	2010	2011	2012	2013	2014
Total	..	338 000	346 000	348 000	357 000 p	366 000 p
Tourism industries
Accommodation services for visitors
Hotels and similar establishments
Food and beverage serving industry
Passenger transport
Air passenger transport
Railways passenger transport
Road passenger transport
Water passenger transport
Passenger transport supporting services
Transport equipment rental
Travel agencies and other reservation services industry
Cultural industry
Sports and recreation industry
Retail trade of country-specific tourism characteristic goods
Other country-specific tourism industries
Other industries

.. Not available; p Provisional data

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933320298>Table 3. **Netherlands: Internal tourism consumption**


Million EUR

	2010		
	Domestic tourism consumption	Inbound tourism consumption	Internal tourism consumption
Total	24 037	7 356	31 393
Consumption products	22 503	6 761	29 264
Tourism characteristic products	18 191	3 412	21 603
Accommodation services for visitors	1 811	855	2 666
Food and beverage serving services	8 178	935	9 113
Passenger transport services	3 772	1 310	5 082
Air passenger transport services	..	..	..
Railways passenger transport services	..	..	..
Road passenger transport services	..	..	..
Water passenger transport services	..	..	..
Passenger transport supporting services	..	..	..
Transport equipment rental services	..	..	..
Travel agencies and other reservation services industry	997	1	998
Cultural services	1 285	213	1 498
Sports and recreation services	2 148	98	2 246
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	4 312	3 349	7 661
Tourism connected products	..	..	..
Non-tourism related consumption products
Non-consumption products

.. Not available

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933320307>



From:

OECD Tourism Trends and Policies 2016

Access the complete publication at:

<http://dx.doi.org/10.1787/tour-2016-en>

Please cite this chapter as:

OECD (2016), "Netherlands", in *OECD Tourism Trends and Policies 2016*, OECD Publishing, Paris.

DOI: <http://dx.doi.org/10.1787/tour-2016-29-en>

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