

Netherlands

Tourism in the economy

The importance of domestic and inbound tourism for the Netherlands remains high, with both providing a substantial impetus to the Dutch economy. In 2016, direct tourism GDP was estimated to be EUR 24.8 billion (up 5.9%), representing 3.9% of total GDP. Over the same period, the number of persons directly employed in tourism was estimated to be up 2.6% to 389 000 (full-time equivalents), which accounted for 5.5% of total employment.

Overnight international arrivals grew to 15.8 million in 2016, representing an increase of 5.5% on 2015 but down slightly on recent years (7.8% in 2015 and 8.9% in 2014). Inbound travel receipts totalled EUR 12.8 billion in 2016, up 22.1% on the previous year and accounting for 1.5% of total exports (up from 1.2% in 2014). As in previous years, Germany provided the largest proportion of international visitors (29%), with a growth of 7.8% on 2015. The other leading foreign markets were Belgium (13.5%), the United Kingdom (13%) and the United States (5%).

In 2016 domestic overnight trips totalled 23.1 million (up 3%) and generated 21.4 million nights in hotels and similar establishments. Domestic tourism expenditure amounted to EUR 54.7 billion, or 72.2% of total internal tourism consumption.

Tourism governance and funding

The Ministry of Economic Affairs (the “Ministry”) 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,
- Stimulating synergy between nature, recreation and entrepreneurship,
- Acting as first point of contact within government for tourism industry associations and stakeholders,
- Improving the business climate for the hospitality sector by reducing the regulatory burden.

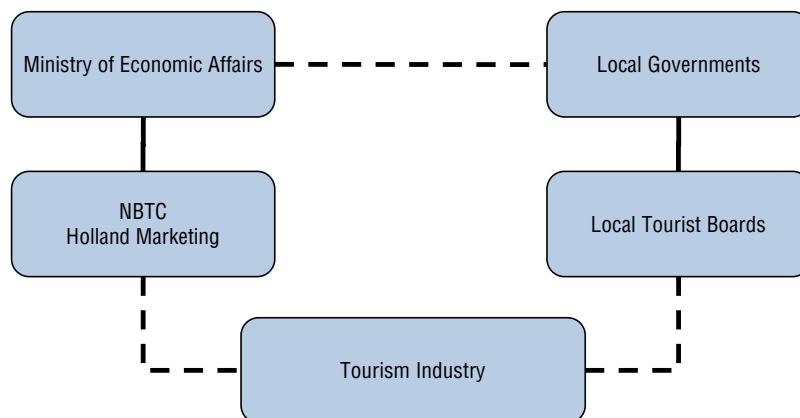
Regional and local authorities are responsible for tourism policy at their respective levels. They deal with tourism matters such as funding regional and local destination marketing organisations, responsible for both domestic and international marketing, and with product development.

NBTC Holland Marketing uses a private public partnership model to create the co-operation necessary to organise marketing programmes, enabling 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 or 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 2016 the Ministry of Economic Affairs provided NBTC Holland Marketing with a grant of EUR 8.5 million.

Netherlands: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Economic Affairs, 2018.

Tourism policies and programmes

In 2013, the hospitality sector brought together a high level group of entrepreneurs, knowledge and marketing institutes, and representatives of the Ministry. The group's ambition for the hospitality economy is that, by 2025, the Netherlands will be the country with the greatest diversity of experiences in the world. Their aim is to offer excellent hospitality, a competitive sector, and an attractive society. In turn, this will promote a healthy business climate to encourage foreign companies to invest in the Netherlands.

The strategic vision is based on three concepts:

- Find: guests do not want to go searching but wish to find things and be surprised at what they discover,
- 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 beyond 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 was defined for each of seven themes: innovation, human capital, technology, marketing, deregulation, nature, spirituality and social involvement.

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

In 2017, a final report demonstrated that the action agenda has led to stronger collaboration within the sector. The Ministry wishes to see this collaboration continue, with an emphasis on collaboration between national and regional authorities, and private parties.

HollandCity is a recent example of a collaborative approach based on a new concept of destination level identity and the delivery of visitor experiences.

Spreading tourism to destinations in the Netherlands

Together with NBTC and the provinces, the Ministry of Economic Affairs aims to promote the sustainable growth of tourism through a more balanced distribution of the increasing numbers of tourists throughout the year and across the country.

Attractions located outside of major centres enable regions to profit from the economic benefits of tourism, while helping to prevent tourism from becoming concentrated in just a few places. Building on this philosophy, the HollandCity concept was developed by NBTC and industry partners to present the Netherlands as one large metropolis, inspiring visitors to step off the beaten track through a three-pronged strategy focused on events, districts and storylines, built around an imaginary metro network.

HollandCity's imaginary storylines link different places across the country through a common theme. For example, visitors are inspired to enrich their experience of the Netherlands through exploring Van Gogh's connections not only with Amsterdam, but also the Arnhem region and Brabant. Good connectivity between the different places within each storyline is essential.

Attractive events can help to distribute visitors throughout the country, and also attract visits in the off-season. Cultural and regional themes have been used successfully to promote the Netherlands. In 2016, for example, domestic and overseas promotions focused on "Jheronimus Bosch 500", with a year-long programme on the 500th anniversary of the artist's death, while 2017 showcases "Mondrian to Dutch Design". To date, eleven of the twelve Dutch provinces are participating and, over the next two years, NBTC will work with the provincial authorities and market operators to introduce additional storylines.

Statistical profile

Table 1. Netherlands: Domestic, inbound and outbound tourism

	2012	2013	2014	2015	2016
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	21 147 |	21 267	21 931	22 311	23 054
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	63 341 |	64 304	65 328	66 237	66 589
Hotels and similar establishments	18 709 |	19 039	19 680	19 910	21 421
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	12 206 |	12 783	13 925	15 007	15 829
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Germany	3 209 |	3 495	3 894	4 283	4 615
Belgium	1 537 |	1 673	1 828	1 965	2 132
United Kingdom	1 662 |	1 680	1 857	1 967	2 045
United States	1 381 |	1 337	1 431	1 508	1 646
France	666 |	680	725	750	788
Nights in all types of accommodation	29 570 |	31 771	34 424	37 298	39 624
Hotels and similar establishments	17 827 |	18 351	20 184	21 708	23 169
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	18 628	18 093	17 933	18 070	17 938
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
Germany	3 400	3 183	3 377	3 375	3 519
France	2 798	2 677	2 606	2 617	2 550
Spain	1 796	1 759	1 856	1 969	2 177
Belgium	1 811	1 766	1 425	1 430	1 341
Austria	1 233	1 178	1 113	1 157	1 104
TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	13 757	14 633	15 430	16 200	12 756 p
International travel receipts	9 569	10 343	9 749	10 447	12 756 p
International passenger transport receipts	4 188	4 290	5 681	5 752	..
Outbound tourism					
Total international expenditure	15 639	15 824	17 365	17 544	16 190 p
International travel expenditure	15 393	15 589	15 382	15 826	16 190 p
International passenger transport expenditure	246	235	1 983	1 718	..

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

Source: OECD Tourism Statistics (Database).



StatLink  <http://dx.doi.org/10.1787/888933640785>

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

	Number of establishments	Number of persons employed				
	2016	2012	2013	2014	2015	2016
Total	..	487 000	495 000	515 000	530 000	542 000
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

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933640804>Table 3. **Netherlands: Internal tourism consumption**

Million EUR

	2016		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	54 716	21 029	75 745
Consumption products
Tourism characteristic products
Accommodation services for visitors
Food and beverage serving services
Passenger transport services
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
Cultural services
Sports and recreation services
Country-specific tourism characteristic goods
Country-specific tourism characteristic services
Other consumption products
Tourism connected products
Non-tourism related consumption products
Non-consumption products

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933640823>



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