

# 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 2018, expenditure in the hospitality sector accounted for EUR 87.5 billion. In 2018, the sector employed 679 000 people, which accounted for 7.2% of total employment. The sector directly contributes to 4.4% of total GDP. Travel exports accounted for 7.6% of total service exports in 2018.

According to the latest figures, in 2018 the Netherlands was visited by 18.8 million international overnight visitors, with the largest proportion originating from neighbouring countries. As in previous years, Germany was the largest source market (30.3%), growing 8.5% in 2018 when compared with 2017. Other leading foreign markets were Belgium (12.8%) and the United Kingdom (11.8%). Also many tourists came from Asia (7.2 %) and the America's (11.0%). Inbound tourism generated receipts of EUR 32.5 billion.

In addition the number of domestic overnight visitors in the Netherlands in 2018 was 25.1 million, up 3.4% over 2017. Domestic tourism generated receipts of EUR 51.9 billion.

## Tourism governance and funding

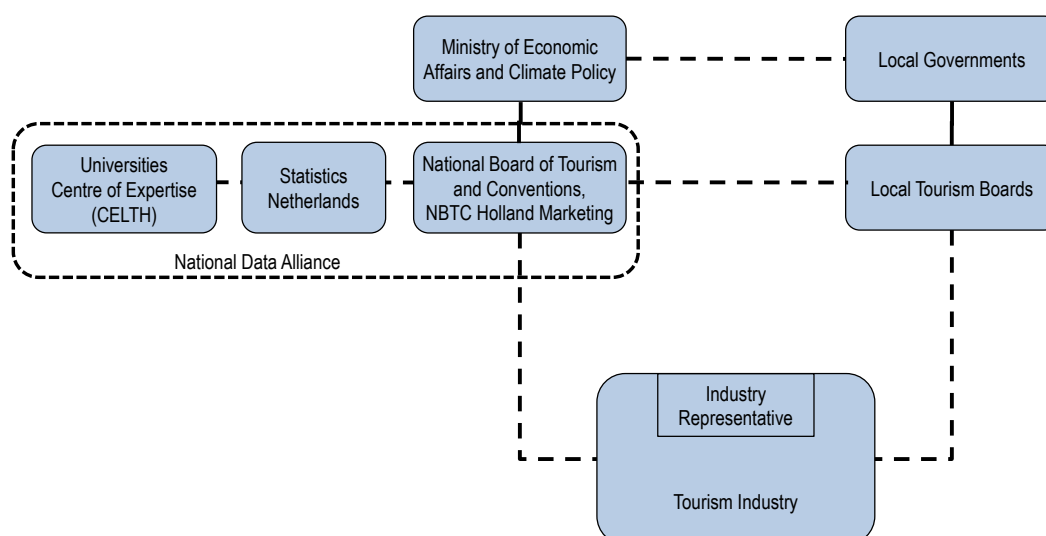
The Ministry of Economic Affairs and Climate Policy is responsible for tourism at the national level. This includes stimulating innovation, entrepreneurship and sustainability, acting as a first point of contact within government for tourism industry associations and stakeholders, and partial funding of the Netherlands Board of Tourism and Conventions (NBTC) Holland Marketing (up to a maximum of 50% of total funding).

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 contribute budget and other investments around a shared goal. These 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 tourism and related sectors), in the Netherlands and other countries.

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

In 2019, the Ministry of Economic Affairs and Climate Policy provided the NBTC Holland Marketing with a subsidy of EUR 8.9 million.

## Netherlands: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Economic Affairs and Climate Policy, 2020

## Tourism policies and programmes

In 2018, the Ministry of Economic Affairs and Climate Policy together with NBTC Holland Marketing and the provinces, organised the Netherlands' first National Tourism Summit. The goal of the Summit was to enhancing co-operation between public and private stakeholders involved with tourism and developing an Action Programme fit for the future. The objective was to work on a joint approach to enable as many cities, towns and regions as possible to benefit from growing tourism and learn from each other.

During the Summit, NBTC Holland Marketing presented Perspective 2030, a new vision for destination Netherlands. The objective of Perspective 2030 is that by 2030 everyone in the Netherlands must, on balance, benefit from tourism (Box 3.4).

Until 2015, NBTC Holland Marketing targeted growth in numbers of visitors, since tourism offered clear opportunities for the economy. Significant and continuing growth, however, has shown a downside to the country's popularity. In response, the Netherlands introduced the HollandCity Strategy, which seeks to spreading visitors in time and space. The aim is to entice visitors to go to less well known places throughout the country. Despite the HollandCity Strategy's contribution, the continued and forecast growth makes it necessary to change policy. Therefore Government aims to:

- Facilitate co-operation between regions.
- Improve data and build knowledge of the sector.
- Encourage the development of destination management.

To achieve these goals, NBTC Holland Marketing's objectives and activities will be adjusted during the next subsidy period, taking into account an independent policy evaluation targeting NBTC Holland Marketing's performance for the period 2016-2019, which will be completed in 2019. Promotion and marketing activities will be replaced by destination management activities.

Data is essential for effective policy making. The National Data Alliance (LDA) was created in 2018 by NBTC Holland Marketing, Statistics Netherlands and the Centre of Expertise for Leisure, Tourism and Hospitality (CELTH), by bundling data and expertise, the focus is on developing insights which benefit decision-making. The LDA is intended as an open network, in which everybody can participate, who is

interested in sharing data, analysis and insights in the field of tourism. The focus is on four major subjects: number and profiles of visitors, customer journey, impact of tourism and the supply-side of tourism. The intention is to start in 2019 with a small number of projects and gradually expand the field of research.

Furthermore, in September 2019 the central government will receive advice on 'Tourism in relation to the human environment', by the Council for the Environment and Infrastructure, which is an independent advisory board. This advice could influence future policy development regarding tourism.

Together, the Perspective 2030 sectoral view on Destination Netherlands, NBTC Holland Marketing's policy evaluation, and the report on Tourism in relation to the Human Environment, will all combine to help the Netherlands adjust its policy objectives for the future.

Future policy responses by the Netherlands Government target three main trends and goals, each of which has specific targets:

- **Growing tourism:** the target is to spread tourism in time and space, and shift objectives from promotion and marketing towards destination management.
- **Increasing co-operation between different layers of government:** this will be enhanced by promoting provincial and regional synergies, and by formulating an action programme based on the strategic pillars of Perspective 2030.
- **Increasing co-operation within the tourism sector:** other core targets include positioning different attractive destinations, accessibility, sustainable tourism, and improving visitor experiences.

The Provinces, NBTC Holland Marketing and the Ministry of Economic Affairs & Climate Policy have taken the initiative to formulate an Action Programme in which these strategic pillars are further developed. The Action Programme aims for stronger collaboration among national and regional authorities and private parties and was presented during the second National Tourism Summit in late 2019.

## Statistical Profile

## Netherlands: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	21 931	22 311	23 054	24 311	25 132
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	65 328	66 237	66 589	67 529	69 080
Hotels and similar establishments	47 939	49 516	50 201	52 628	53 614
Other collective establishments	17 389	16 720	16 388	14 901	15 466
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	13 925	15 007	15 829	17 924	18 780
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Germany	3 894	4 283	4 615	5 243	5 689
Belgium	1 828	1 965	2 132	2 224	2 398
United Kingdom	1 857	1 967	2 045	2 229	2 212
America	1 431	1 508	1 646	2 013	2 072
Asia	..	..	..	..	..
Nights in all types of accommodation	34 424	37 298	39 624	44 169	47 002
Hotels and similar establishments	30 325	33 025	35 100	39 272	41 721
Other collective establishments	4 098	4 272	4 523	4 897	5 282
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	17 933	18 070	17 938	22 003	22 166
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
Germany	3 377	3 375	3 519	3 782	3 713
France	2 606	2 617	2 550	2 802	2 873
Spain	1 856	1 969	2 177	2 696	2 630
Belgium	1 425	1 430	1 341	1 638	1 566
Italy	..	..	1 175	1 464	1 425
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR</b>					
<b>Inbound tourism</b>					
Total international receipts	16 726	18 309	19 109	21 141	22 064
International travel receipts	11 089	12 493	13 492	15 167	15 986
International passenger transport receipts	5 636	5 815	5 617	5 974	6 078
<b>Outbound tourism</b>					
Total international expenditure	19 448	20 002	20 363	22 319	22 203
International travel expenditure	17 385	17 862	17 984	19 454	19 334
International passenger transport expenditure	2 063	2 139	2 378	2 865	2 869

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077483>

## Netherlands: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2018	2014	2015	2016	2017	2018
<b>Total</b>	..	<b>413 000</b>	<b>423 000</b>	<b>438 000</b>	<b>456 000</b>	<b>474 000</b>
<b>Tourism industries</b>	<b>180 860</b>	..	..	..	..	..
Accommodation services for visitors	8 660	..	..	..	..	..
Hotels and similar establishments	4 365	..	..	..	..	..
Food and beverage serving industry	47 095	..	..	..	..	..
Passenger transport	11 540	..	..	..	..	..
Air passenger transport	310	..	..	..	..	..
Railways passenger transport	30	..	..	..	..	..
Road passenger transport	10 150	..	..	..	..	..
Water passenger transport	1 050	..	..	..	..	..
Passenger transport supporting services	4 280	..	..	..	..	..
Transport equipment rental	1 060	..	..	..	..	..
Travel agencies and other reservation services industry	5 370	..	..	..	..	..
Cultural industry	80 920	..	..	..	..	..
Sports and recreation industry	21 935	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	..	..	..	..	..

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077502>

## Netherlands: Internal tourism consumption

Million EUR

	2018		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	<b>51 873</b>	<b>32 490</b>	<b>87 451</b>
<b>Consumption products</b>	..	..	..
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	..	..	..
<b>Non-consumption products</b>	..	..	..

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077521>



**From:**

# OECD Tourism Trends and Policies 2020

**Access the complete publication at:**

<https://doi.org/10.1787/6b47b985-en>

**Please cite this chapter as:**

OECD (2020), "Netherlands", in *OECD Tourism Trends and Policies 2020*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/9cf4431a-en>

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