

Netherlands

Tourism in the economy and outlook for recovery

International and domestic tourism are of substantial importance to the Dutch economy. The sector's value directly comprised 4.4% of the total GVA and provided 496 000 jobs in 2019, accounting for 6.4% of total employment. The impacts of the pandemic saw tourism GVA remain 40.1% lower in 2021 at EUR 19.1 billion, or 2.5% of total GVA. Employment was less impacted, but there were 95 000 fewer tourism jobs in 2021.

In 2020, international tourists fell 63.9% compared to 2019, with a further decline of 13.5% in 2021 to 6.3 million overnight visitors. Typically, more than half of international visitors come from the top three markets of Germany, Belgium and France. In 2021, there were 2.5 million overnight visitors from Germany (39.5% of visitors).

The impacts on domestic tourism were limited, with domestic overnight visitors in tourism-related accommodation establishments falling 22.3% in 2020 and recovering to 25.5 million in 2021, just 1.2% lower than 2019. Domestic expenditure accounts for approximately three-fifths of total tourism expenditure.

Tourism governance and funding

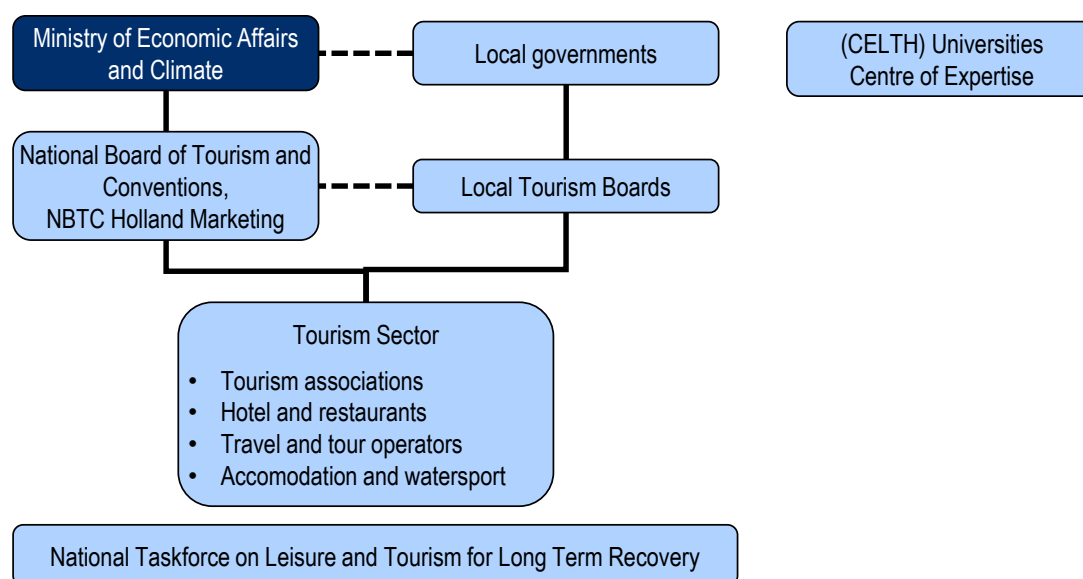
The Ministry of Economic Affairs and Climate Policy is responsible for tourism at the national level. Different provinces and municipalities either have their own tourism strategy or combine it as part of spatial or economic strategies. In addition, regional and local authorities deal with tourism matters such as funding regional and local destination marketing organisations and are responsible for domestic and international marketing and product development.

The Netherlands Board of Tourism and Conventions (NBTC) is the national destination management organisation. NBTC works on the country's positioning, development and marketing for and with partners in different industries. The NBTC is subsidised by the Ministry of Economic Affairs, receiving EUR 9.2 million in 2021 (up from EUR 8.9 million in 2019) and funding from various third parties for specific projects.

The Centre of Expertise Leisure, Tourism and Hospitality (CELTH) is a collaboration between Dutch universities of applied sciences in tourism. The aim is to stimulate public-private partnerships in the field of knowledge and research in order to encourage collaboration between education, industry and government. Recently CELTH developed the Agenda Conscious Destinations (see box below).

During the COVID-19 crisis, the Netherlands worked with stakeholders in the sector to create a national Taskforce on Leisure and Tourism. The purpose of the Taskforce is to strengthen co-operation between the various parties. The Taskforce aims to restart the sector in the short term and form strong co-operation for a resilient and sustainable tourism and hospitality sector in the medium and long term.

Netherlands: Organisational chart of tourism bodies



Source: OECD, adapted from Ministry of Economic Affairs and Climate, 2022.

Tourism policies and programmes

In 2019, the Netherlands developed a national tourism vision, Perspective 2030, with the objective that everyone in the country must benefit from tourism. Perspective 2030 is used by the Ministry of Economic Affairs and Climate Policy as a guideline for future policy development and policy objectives. Achieving the ambition of Perspective 2030 requires a switch from promoting destinations to developing destinations and making visitor flows more manageable while capitalising on ambitions and opportunities. The vision centres on the shared interest of residents, visitors and businesses. It is based on five strategic pillars:

- Creating more benefits than burdens from tourism.
- Making the Netherlands attractive everywhere by positioning different destinations.
- Promoting accessibility and reachable tourist destinations.
- Enhancing sustainable tourism with less waste and pollution.
- Building a hospitable experience for visitors.

The NBTC, the Ministry and the provinces adopted a related action programme, used as a living document in which the strategic pillars are worked out. Despite the enormous effect of COVID-19 on the tourism sector, the three main policy goals remain:

- Sustainable growth of tourism.
- Increased co-operation between different layers of government.
- Support for the tourism sector, focusing on opportunities for sustainability, entrepreneurship, innovation and digitisation.

The NBTC, together with stakeholders within the Taskforce, aims to align the Dutch tourism sector in accelerating climate action by developing a Roadmap for Climate Neutral Tourism in the Netherlands. This roadmap, which will be based upon the main pillars of the Glasgow Declaration, will bring together knowledge on the state of the destination regarding climate action.

Tourism is an integral part of the Netherlands' enterprise policy, which focuses on stimulating innovation, entrepreneurship, digitalisation and sustainability, and access to financing and public services for business owners. In recent years the Netherlands has paid more attention to the sustainable development of tourism as the negative impacts of the country's popularity and growth in tourism have become clear.

The Ministry is also responsible for encouraging innovation, digitalisation and sustainability for entrepreneurs, specifically SMEs. To encourage nationwide co-operation, the Ministry, together with NBTC and the provinces, organises the National Tourism Summit. Three editions have taken place since 2018. This involved a broad group of representatives of the business community, tourist organisations and government bodies from all parts of the country. The objective was to work on a joint approach to enable cities, towns and regions to benefit from growing tourism and learn from each other.

Conscious Destinations Agenda in the Netherlands

The Centre of Expertise on Leisure, Tourism and Hospitality (CELTH) has put together a multi-year knowledge agenda for the hospitality domain. Knowledge on five urgent themes is being developed around the Conscious Destination Agenda: living environment, human capital, organisational capacity, smartness, and leisure offer. Partners of CELTH are challenged to co-invest and thereby strengthen the much-needed knowledge foundation in the hospitality domain.

CELTH specifically opts for the destination level because that is where all the different sub-sectors and actors come together. At the destination, hospitality and value are created for tourists, residents and companies. In a conscious destination, parties strive for an outcome in which the hospitality domain has the most positive possible social, ecological and economic impact and in which it leads to the highest possible quality of life, experience and work. In a conscious destination, the social value of the hospitality domain is put first. All actors work on the most positive possible economic, social and ecological impacts for residents (quality of life), visitors (quality of experiences) and professionals within the domain (quality of work).


The approach to integrally optimising a destination is gaining more and more support, and CELTH expects that this will become dominant in the (near) future, not only in the Netherlands but worldwide. Social and political pressure is mounting to reconsider the usual approach that only leads to growth or that sees the hospitality domain as a mere threat. The conscious choices underlying the optimisation approach are in line with the vision of conscious destinations.

Statistical Profile

Netherlands: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	24 311	25 132	25 787	20 035	25 472
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	67 529	69 080	71 692	64 042	82 479
Hotels and similar establishments	52 628	53 614	55 720	46 777	60 027
Other collective establishments	14 901	15 466	15 972	17 266	22 452
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	17 924	18 780	20 129	7 265	6 248
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Germany	5 243	5 689	6 175	3 283	2 471
Belgium	2 224	2 398	2 507	1 102	1 100
France	842	893	963	386	413
America (Continent)	2 013	2 072	2 181	384	350
Asia	1 373	1 360	1 473	253	240
Nights in all types of accommodation	44 169	47 002	51 750	21 372	18 615
Hotels and similar establishments	39 272	41 721	45 848	17 990	15 657
Other collective establishments	4 897	5 282	5 902	3 383	2 958
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	22 084	22 277	22 925	11 719	10 670 p
Same-day visitors (excursionists)	21 403	13 791	12 709	5 038	3 940 p
Top destinations					
France	2 807	2 876	2 692	1 517	2 032 p
Germany	3 785	3 789	3 734	2 570	1 574 p
Belgium	1 628	1 579	1 787	1 030	1 113 p
Spain	2 695	2 621	2 583	993	1 096 p
Italy	1 462	1 440	1 322	533	970 p
TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	21 141	22 529	23 962	10 909	10 554
International travel receipts	15 167	16 236	17 624	8 769	8 183
International passenger transport receipts	5 974	6 293	6 339	2 139	2 371
Outbound tourism					
Total international expenditure	22 319	22 188	23 553	8 083	10 122
International travel expenditure	19 454	19 287	20 656	7 157	9 400
International passenger transport expenditure	2 865	2 901	2 898	925	722

.. Not available; p Provisional data; | Break in series
Source: OECD Tourism Statistics (Database).


StatLink  <https://stat.link/ut49ai>

Netherlands: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2021	2017	2018	2019	2020	2021
Total	..	459 000	479 000	496 000	419 000 p	401 000 p
Tourism industries	208 365 p	..	..	..	..	..
Accommodation services for visitors	10 115 p	..	..	..	..	..
Hotels and similar establishments	5 445 p	..	..	..	..	..
Food and beverage serving industry	54 910 p	..	..	..	..	..
Passenger transport	13 905 p	..	..	..	..	..
Air passenger transport	325 p	..	..	..	..	..
Railways passenger transport	25 p	..	..	..	..	..
Road passenger transport	12 335 p	..	..	..	..	..
Water passenger transport	1 220 p	..	..	..	..	..
Passenger transport supporting services	5 860 p	..	..	..	..	..
Transport equipment rental	1 120 p	..	..	..	..	..
Travel agencies and other reservation services industry	6 055 p	..	..	..	..	..
Cultural industry	93 545 p	..	..	..	..	..
Sports and recreation industry	22 855 p	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	..	..	..	..	..	..

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/dzo9ec>

Netherlands: Internal tourism consumption

Million EUR

	2021		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	37 764 p	17 819 p	58 928 p
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; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/mtd01>



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