

The Netherlands

Tourism in the economy

According to the TSA in 2006, the added value of tourism was EUR 13.6 billion, or 2.9% of GDP (Table 3.72). In 2002, TSA data showed that there were some 395 000 employees in the tourism sector, 4.1% of the employed labour force at the time.

In 2006, 10.7 million international visitors arrived in the Netherlands, an increase of 7% on 2005. The average length of stay has decreased a little, while the number of overnight stays grew by 6% to 26.9 million. Domestic tourism in 2006 accounted for 17.8 million domestic holiday trips, 2.9% up from 17.3 million in 2005.

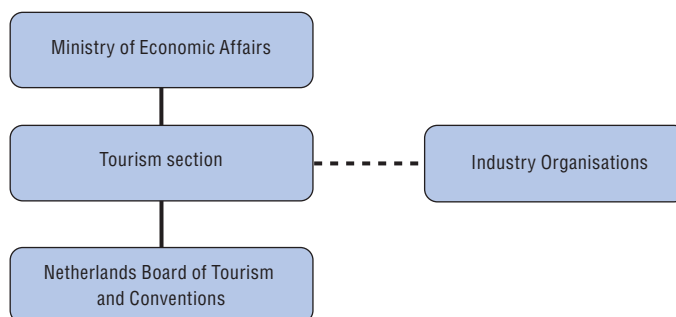
There has been a steady rise in the number of tourism establishments since 2002 in hotels, camp sites and holiday bungalows, although the number of ANVR travel agencies (Dutch Association of Travel Agents and Tour Operators) has declined while tour operator numbers have stagnated.

Tourism organisation

The Ministry of Economic Affairs is responsible for tourism policy in The Netherlands (Figure 3.22). The main focus of tourism policy is to create a competitive business environment for the tourism sector and to attract foreign tourists. International promotion is carried out by the Netherlands Board of Tourism and Conventions (NBTC).

The focus of national tourism policy is international promotion. Provinces and municipalities promote themselves on the domestic market and internationally through the NBTC.

Figure 3.22. **Organisational chart of tourism bodies in the Netherlands**



Source: OECD, adapted from Ministry of Economic Affairs, 2007.

Tourism budget

The 2007 budget for the NBTC is EUR 17.3 million. The Ministry of Economic Affairs allocates EUR 1 million annually for investment in the tourism sector's competitiveness. Additional investment in tourism is possible through the European Structural Funds, although most of the investment in tourism in the Netherlands is in fact by the private sector.

Tourism related policies and programmes

Key policies

The main objective of tourism policy during 2004-06 was to attract as many foreign visitors to the Netherlands as possible. The goal was to increase the Netherlands' market share of all incoming tourism in the neighbouring countries of Belgium, Denmark, Germany and the United Kingdom. This policy has been partly successful; incoming tourism rose over the period, but the country's market share has decreased due to a rapid growth in arrivals in Germany and the United Kingdom. These countries have benefited in particular from a growing number of low-cost carrier connections.

A new tourism policy is currently under preparation.

Co-operation with the Tourism Industry, Consumers and Other Stakeholders


The Ministry works in close co-operation with the branch organisations in the design and implementation of policies. Measures towards SMEs are mostly generic. The Dutch government is creating an internationally competitive playing field for SMEs, with improved regulation and the cutting of red tape having been the main focus for the past couple of years.

2006 was the year of the Rembrandt 400 celebration. This was a major public-private partnership event in which national government, municipalities, museums, marketing organisations, the airport and many other stakeholders co-operated. The year was very successful, particularly because of the excellent co-operation between the tourism and the cultural sectors. The organisation of the event is seen as an example of best practice which can be used as a model for forthcoming events.

Statistical profile

Table 3.69. **Inbound tourism: International arrivals and receipts**

	Units	2002	2003	2004	2005	2006
Tourists (overnight visitors)	Thousands	9 595	9 181	9 646	10 012	10 738
<i>of which:</i>						
Germany	Thousands	2 755	2 804	2 649	2 609	2 812
United Kingdom	Thousands	1 951	1 647	1 760	1 853	1 913
United States	Thousands	886	822	900	971	1 047
Belgium	Thousands	705	779	811	917	991
France	Thousands	511	465	510	527	608
Tourism receipts	Million EUR	8 150	8 099	8 306	8 421	9 172

StatLink  <http://dx.doi.org/10.1787/156112705366>

Source: Statistics Netherlands (CBS), 2007.

Table 3.70. **Outbound tourism: International departures and expenditure**

	Units	2002	2003	2004	2005	2006
Departures	Thousands	16 758	16 463	17 173	17 086	16 752
Tourism expenditure	Million EUR	9 730	9 750	10 120	10 260	10 415

StatLink  <http://dx.doi.org/10.1787/156118624710>

Source: Continuous Holiday Survey (CVO), 2007.

Table 3.71. **Employment in tourism in 2002**

	Units	2002	
		Jobs	Employees
Employment in tourism sector (total)	Thousands	439	395
<i>of which:</i>			
Accommodations	Thousands	51	47
Restaurants and cafes	Thousands	174	154
Transportation companies	Thousands	60	58
Travel agencies	Thousands	26	25
Cultural institutions	Thousands	33	27
Other recreational companies	Thousands	35	27
Other companies	Thousands	60	57

StatLink  <http://dx.doi.org/10.1787/156156132440>

Source: CBS, Tourism Satellite Account (TSA), 2002.

Table 3.72. **Tourism in the national economy**

	Units	2002	2003	2004	2005	2006
Tourism as % of:						
services exports	Percentage	..	12.9	12.1	11.5	..
gross domestic product	Percentage	3.2	3.1	3.0	3.0	3.0
added value	Percentage	3.1	2.9	2.9	2.9	2.9
employment	Percentage	4.1	4.1	4.1	4.1	4.1

StatLink  <http://dx.doi.org/10.1787/156186673331>

Sources: CBS, Tourism Satellite Account (TSA), 2007.

Synthesis

The following chapter presents summary details of the tourism sector in 32 countries, 30 of which are OECD members, in addition to Romania and South Africa. Each country section is set out under five main headings:

- Tourism in the economy.
- Tourism organisation.
- Tourism budget.
- Tourism related policies and programmes.
- Statistical profile

For further information, a synopsis table in Annex 3.A1 indicates the main websites for national tourism administrations, national tourism organisations and other important Tourism related organisations.

This chapter focuses mainly on international tourism (inbound and outbound). It also includes some partial data on domestic tourism based on Tourism Satellite Account sources or on national surveys. The measurement of domestic tourism, in terms of the number of tourist trips taken each year, is not generally provided by most countries on a consistent basis and does not readily lend itself to aggregations and international comparisons.

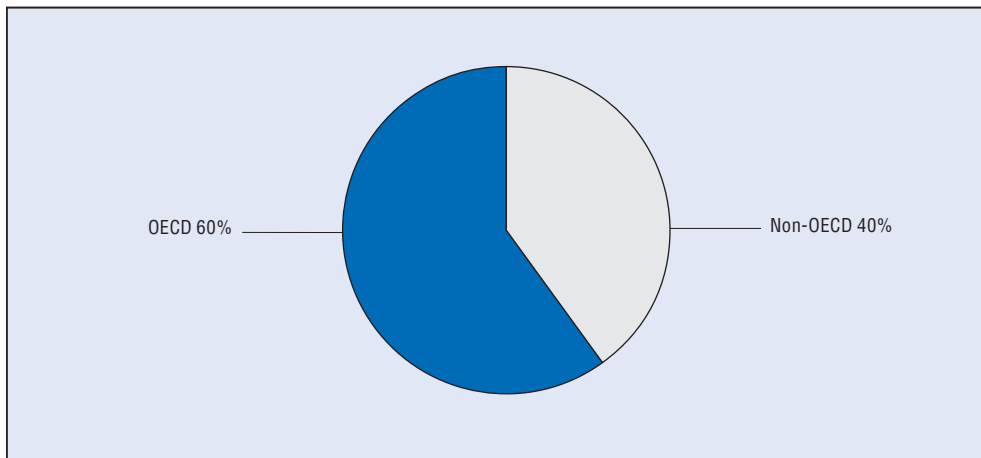
International tourist arrivals, however, are recorded for almost all countries. Data for 2005, the latest year for which complete data are available, show that globally there were 802 million international tourist arrivals (World Tourism Organisation). In the OECD member countries, international tourist arrivals in that year totalled 481.5 million, and thus these countries account for 60.0% of all international tourism by this measure (Figure 3.1).

Eight out of the top ten international tourism destinations are included in this chapter, the exceptions being China and Russia. These eight – France, Spain, USA, Italy, UK, Germany, Mexico and Austria – together accounted for 308.9 million arrivals in 2005, 38.5% of the global total.

Tourism in the economy

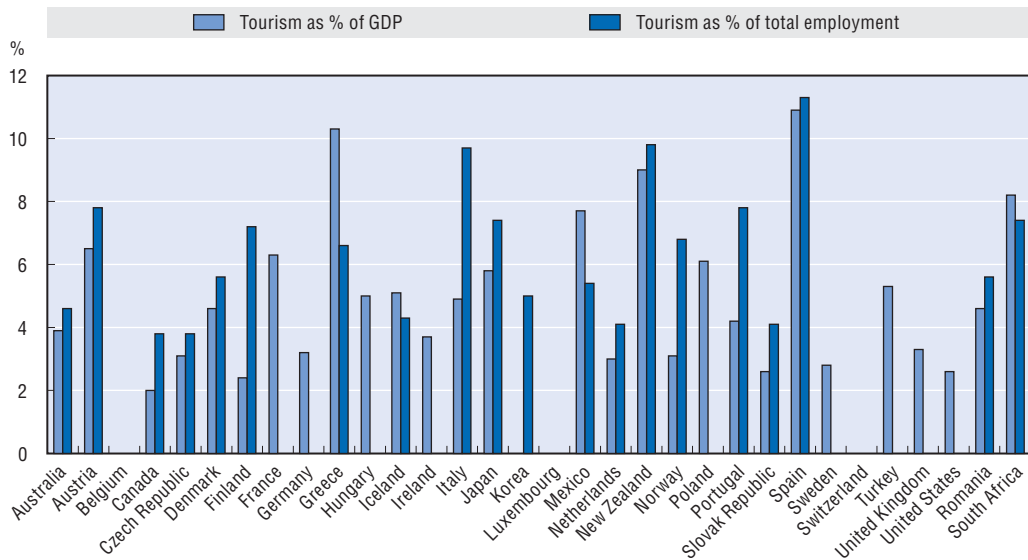
The importance of the tourism sector in the economies of these 32 countries varies widely. To generalise however, tourism accounts for an important share of Gross Domestic Product (GDP) and of services exports in many countries (see Chapter 1, *New Paradigm for International Tourism Policy*), and also generates a substantial share of total employment. Although data coverage of these measures is variable (see individual sections for country details), an idea of tourism's economic importance is given in the Figure 3.2.

Figure 3.1. **International tourist arrivals, world, 2005**



StatLink <http://dx.doi.org/10.1787/153030008744>

Figure 3.2. **Tourism in the economy, 2006**



StatLink <http://dx.doi.org/10.1787/152847245261>

Clearly tourism is an important economic force in many of the countries covered here. For some of the world’s major tourism destinations, tourism plays a crucial role in sustaining employment and in earning foreign currency receipts.

Tourism organisation

The treatment of the tourism sector within the government structures of the countries covered in this chapter varies considerably. Moreover, due to variations in government structures it is difficult to be precise about which portfolio includes tourism. However, the growing economic and political importance of tourism is reflected by the fact that 15 OECD countries have a Ministry or a Secretariat of State with Tourism named in their title.

Several countries have their own dedicated tourism ministries (Greece, Mexico and New Zealand), however in most cases, the tourism portfolio is attached to Economy,

Industry, Trade or SME ministries (Australia, Austria, Canada, Denmark, Finland, France, Germany, Netherlands, Norway, Portugal, Romania, Slovak Republic, Spain, Sweden, Switzerland and United States). For a few others, the tourism portfolio is linked to Regional Development (Czech Republic and Hungary), Culture and Sports (Ireland, Korea, Poland, Turkey and United Kingdom), Environment (South Africa) or Transportation (Japan).

Tourism budgets

A comparison of tourism budgets is complicated by issues of exchange rates and, especially, of the different approaches to the public funding of tourism support adopted by governments. Readers are referred to the country sections for details.

As a generalisation, however, the largest item in public budgetary support for tourism tends to be the marketing budgets granted to national tourist offices or their equivalents for international marketing purposes. Again as a generalisation, it is typically the national tourist office that is responsible for marketing the country as a tourism destination to foreign visitors. Regions or specific destinations within countries are then responsible for their own promotion within the country concerned, but generally national governments discourage regions from direct (and usually costly) international marketing themselves. In some countries, such as the United States for example, where it is felt that the country's international profile is inherently high, international marketing budgets are limited.

For domestic tourism, countries are becoming increasingly aware of the economic benefits to be gained from encouraging nationals to take their holidays in their own countries, both in terms of balance of payments benefits (by avoiding expenditure on holidays abroad) and in terms of the economic stimulation that a vigorous domestic tourism sector can generate. As a result, national tourist offices or other public tourism organisations are taking on more responsibility for the active promotion of tourism opportunities within their own countries to their resident population.

Tourism related policies and programmes

Public investment in tourism is again highly varied across countries, and the reader is referred to the country sections for detailed information.

As an economic activity with the potential to create jobs, add value and earn foreign exchange, tourism is increasingly being seen as a sector in which public investment can be justified, in a number of areas. The most common are:

- Investment programmes in infrastructure which can contribute to facilitating access to the tourism industry for nationals and foreigners alike.
- Programmes supporting the small business sector which, in terms of the number of enterprises engaged, is dominated by SMEs; programmes to enhance quality in tourism most commonly through action of training.
- Programmes aimed at the quality of tourism facilities and services (these often involve the introduction and maintenance of national quality standards and quality accreditation schemes).
- Licensing schemes for personnel engaged in tourism (e.g. the licensing of tourism guides).
- The creation of a business and investment climate that is supportive of the tourism sector and which encourages the participation of the private sector as prime investors.

Governments are also increasingly conscious of their role in facilitating international access for visitors to their countries by means of the pursuit of increasingly liberal air transport policies. In the area of environmental policy and conservation, governments are also becoming more directly involved in the promotion of ecologically-friendly policies aimed at minimising the adverse impact of tourism on the physical environment and maximising the sustainability of their tourism sectors.

The concept of public-private partnerships in tourism is being pursued actively by a number of countries, both in the financing of national tourist offices and the development of tourism networks such as those providing information to tourists at a local level, as well as investment programmes geared to leveraging private investment in the tourism sector by means of public pump-priming money.

Policy advice and enabling measures are also increasing, led by national governments, to assist tourism industries and especially small businesses to meet the fast-growing competition in global tourism. A notable emphasis is now being seen on maximising the use of on-line technologies to enable tourism businesses to benefit from and cope with the rapid globalisation of tourism marketplaces and of tourism marketing. Information and reservation systems are at the heart of many of these initiatives, as the direct linkages via the Internet between the tourist and the tourism service supplier strengthen and disintermediation (the elimination of the need for the use of travel intermediaries such as travel agents) increases.

Finally, in addition to the pursuit of national policies and programmes and the promotion of tourism clusters and networks, governments are becoming increasingly aware of the potential benefits to be gained from international co-operation in tourism marketing and promotion and generally take the lead in developing tourism linkages with other, often contiguous, states.

Summary

To summarise, tourism is gaining in importance in the eyes of governments as an economic activity which justifies serious consideration at the level of national policy. Tourism in many countries has already surpassed in economic importance some of the more traditional sectors such as agriculture which historically have commanded greater political attention at national government level. Governments are becoming more aware of the benefits and of the potential pitfalls of the tourism sector in national economic development terms. Closer study of this chapter will illustrate the many initiatives taken by governments in the tourism field and will assist the reader in comparing their own national experience with international best practice.

Basic methodological references

The following definitions are based on UN and UNWTO (1994), International Recommendations on Tourism Statistics (IRTS), UN, Madrid and New York.

Inbound tourism

Arrivals associated to inbound tourism correspond to those arrivals by international (or non-resident) visitors within the economic territory of the country of reference.

Visitors include: a) *Tourists (overnight visitors)*: “a visitor who stays at least one night in a collective or private accommodation in the country visited”; b) *Same-day visitors*: “a visitor who does not spend the night in a collective or private accommodation in the country visited”.

When a person visits the same country several times a year, an equal number of arrivals is recorded. Likewise, if a person visits several countries during the course of a single trip, his/her arrival in each country is recorded separately. Consequently, *arrivals* cannot be assumed to be equal to the number of persons travelling.

Tourism receipts data are obtained from the item “travel, credits” of the Balance of Payments of each country and corresponds to the “expenditure of non-resident visitors (tourists and same-day visitors)” within the economic territory of the country of reference.

Fare receipts data are obtained from the item “transportation, passenger services, credits” of the Balance of Payments of each country and corresponds to the “fare expenditure of non-resident visitors (tourists and same-day visitors)” within the economic territory of the country of reference.

Outbound tourism

Departures associated to outbound tourism correspond to the departures of resident visitors outside the economic territory of the country of reference.

Tourism expenditure data in other countries are obtained from the item “travel, debits” of the Balance of Payment of each country and corresponds to the “expenditure of resident visitors (tourists and same-day visitor)” outside the economic territory of the country of reference.

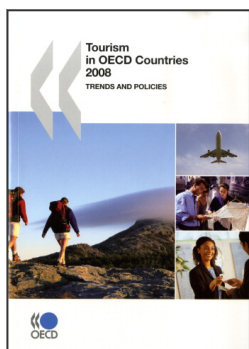
Fare expenditure data in other countries are obtained from the item “transportation, passenger services, debits” of the Balance of Payment of each country and corresponds to the “fare expenditure of resident visitors (tourists and same-day visitor)” outside the economic territory of the country of reference.

Symbols and abbreviations used

.. Not available

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From:
Tourism in OECD Countries 2008
Trends and Policies

Access the complete publication at:
<https://doi.org/10.1787/9789264039773-en>

Please cite this chapter as:

OECD (2008), "The Netherlands", in *Tourism in OECD Countries 2008: Trends and Policies*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/9789264039773-22-en>

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