



KEY FIGURES 2011

Leisure and tourism economy



NETHERLANDS BOARD
OF TOURISM & CONVENTIONS



**Gastvrij
Nederland**

Nationale Raad
toerisme, recreatie,
horeca en vrije tijd

Economic value tourism and recreation

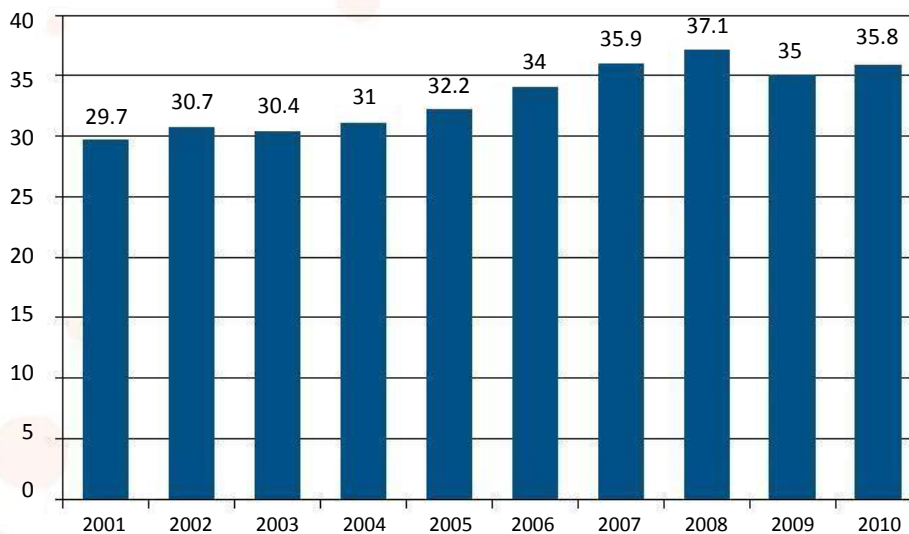
Expenditure and employment* in tourism and recreation in the Netherlands in 2010**

	Inbound travel	Domestic tourism	Outbound tourism	Total
Leisure (x billion euro)	6.1	17.1		
Business (x billion euro)	1.3	2.9		
Expenditure outbound tourism that remains in the Netherlands (x billion euro)			4.1	
Total (x billion euro)	7.4	20.0	4.1	31.5
Acquisition of recreational consumer durables (x billion euro)				2.5
Government grants (x billion euro)				1.9
Total economic value tourism & recreation (x billion euro)				35.8
Share of Gross National Product				2.9%
Total number of touristic jobs				408,000
Percentage of total number of jobs in the Netherlands				4.4%
Leisure workforce (FTEs)				253,000
Percentage of total Dutch workforce (FTEs) in the Netherlands				3.8%

Source: CBS
(Tourism Satellite Account)

* Provisional figures
** The Tourism Satellite Account (TSA) uses a rigid definition of the leisure economy. The following are not included in the TSA figures:
- expenditure on leisure activities of less than two hours' duration
- some relevant categories, e.g. fun shopping
- indirect expenditure, such as payments to suppliers

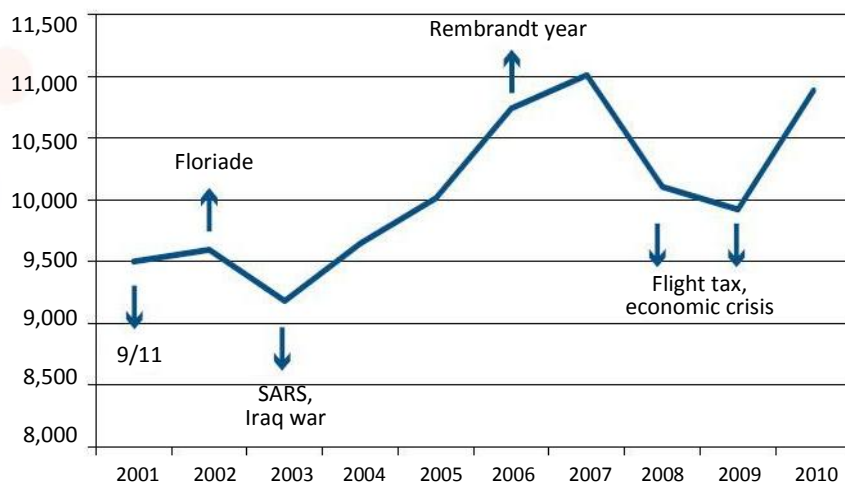
Development total expenditure tourism and recreation in the Netherlands (x billion euros)



Source: CBS (Tourism Satellite Account)

Inbound travel

Development inbound travel to the Netherlands (arrivals, both leisure and business, x 1,000)



Source: CBS; analysis NBTC

Inbound travel (arrivals, both leisure and business) in the Netherlands by source country (x 1,000)

	2006	2007	2008	2009	2010	cf. 2010/ 2009
Germany	2,813	2,833	2,669	2,744	2,848	4%
Great Britain	1,913	1,902	1,639	1,409	1,556	10%
Belgium	991	1,101	1,109	1,172	1,257	7%
France	608	613	575	574	669	17%
Italy	398	398	370	369	443	20%
Spain	391	436	368	351	440	25%
Switzerland	173	177	151	159	179	13%
Denmark	171	163	148	135	150	11%
Russia	87	95	107	101	122	21%
Sweden	114	116	112	101	114	13%
Norway	90	92	93	91	102	12%
Poland	77	83	82	73	85	16%
Austria	66	79	78	68	73	7%
Finland	50	54	54	46	52	13%
Rest of Europe	647	762	730	753	697	-7%
USA	1,047	991	800	767	900	17%
Canada	134	126	116	104	128	23%
Brazil	39	60	61	60	85	42%
Rest of America	105	96	91	86	110	28%
Japan	143	130	116	100	120	20%
China (incl. Hong Kong)	108	125	129	147	126	-14%
India	37	42	51	50	64	28%
Rest of Asia	313	321	260	267	313	17%
Australia	120	121	112	110	147	34%
Africa	93	92	84	84	103	23%
Total	10,738	11,008	10,104	9,921	10,883	10%

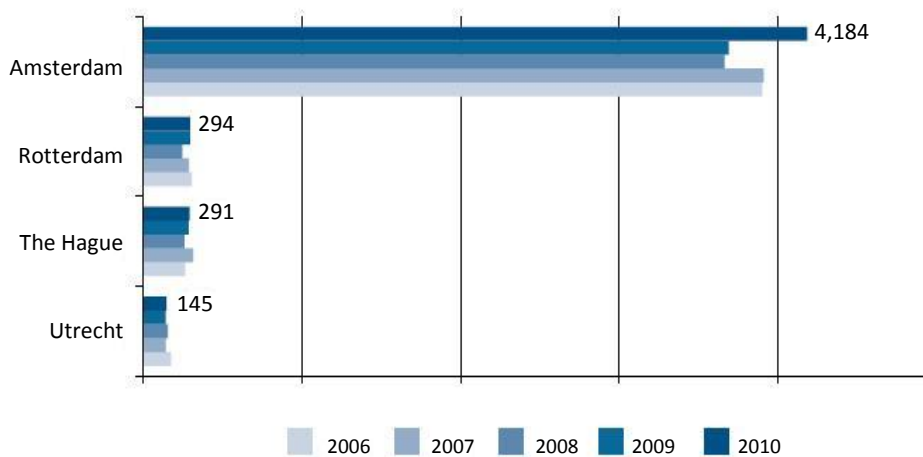
Source: CBS; analysis NBTC

Inbound travel (arrivals in hotels, both leisure and business) in the Netherlands by destination (x 1,000)

	2006	2007	2008	2009	2010	cf. 2010/ 2009
Amsterdam, Rotterdam, The Hague, Utrecht	4,725	4,789	4,330	4,391	4,922	12%
North Sea coast	1,353	1,426	1,343	1,374	1,492	9%
West/Central Brabant	641	663	596	561	683	22%
East Brabant, North/Central Limburg, Rijk v. Nijmegen	493	532	491	467	465	0%
IJsselmeer coast	291	307	287	343	298	-13%
South Limburg	357	342	348	283	316	12%
Delta area	240	275	244	220	228	3%
Wadden Islands	230	204	199	208	202	-3%
Veluwe	229	234	215	202	204	1%
Sandy areas Friesland, Groningen, Drenthe	195	153	137	162	146	-10%
Twente, Salland, Vechtstreek	219	208	229	161	184	14%
Utrechtse Heuvelrug, Het Gooi	143	147	119	124	147	19%
Lakes Friesland, Groningen, NW-Overijssel	93	86	71	75	74	-1%
Lakes in western provinces	74	67	58	57	50	-13%
Achterhoek	58	45	58	45	45	1%
River area Gelderland	22	37	31	20	29	46%
Rest of the Netherlands	1,377	1,495	1,351	1,228	1,399	14%
Total	10,738	11,008	10,104	9,921	10,883	10%

Source: CBS

Inbound travel (arrivals in hotels, both leisure and business) in the Netherlands by city (x 1,000)



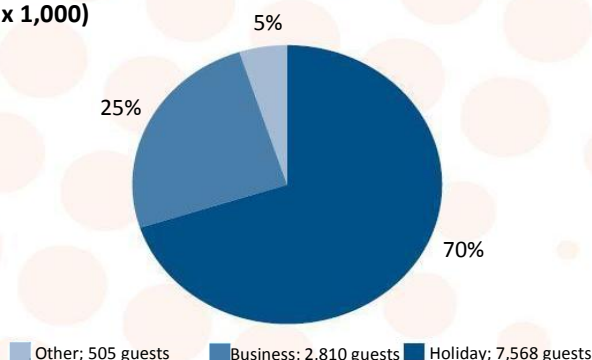
Source: CBS

Inbound travel (arrivals, both leisure and business) in the Netherlands by type of accommodation (x 1,000)

	2006	2007	2008	2009	2010	cf. 2010/2009
Hotels	8,567	8,713	8,035	7,754	8,727	13%
Holiday villages	1,241	1,346	1,282	1,290	1,323	3%
Campsites	806	867	682	756	734	-3%
Group accommodations	125	82	106	121	99	-18%

Source: CBS

Reason inbound guests to visit the Netherlands in 2010 (arrivals x 1,000)



Source: NBTC, inbound tourism survey 2009, analysis NBTC 2010

Top 5 international visitors to the Netherlands for business reasons in 2010 (x 1,000)

1	Brits (499)	3	Belgians (256)	5	French (205)
2	Americans (292)	4	Germans (239)		

Source: NBTC, inbound tourism survey 2009, analysis NBTC 2010

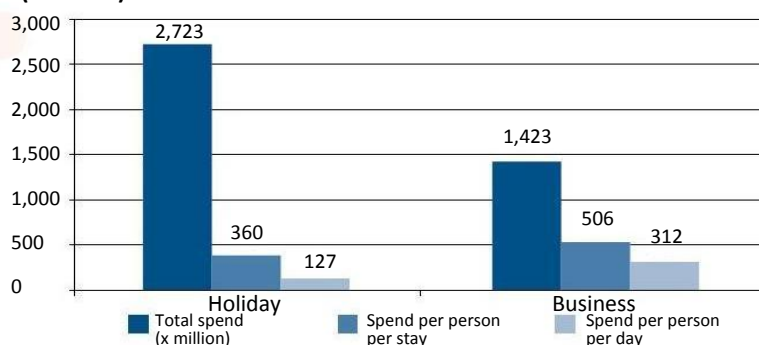
Number of international conventions per country

Ranking	Country	ICCA*		Country	UIA**	
		2009	2010		2009	2010
1	USA	595	623	USA	1,093	944
2	Germany	458	542	Singapore	746	835
3	Spain	360	451	France	720	774
4	UK	345	399	Japan	562	748
5	France	341	371	Spain	388	613
6	Italy	350	341	Belgium	478	611
7	Japan	257	305	Germany	576	529
8	P.R. of China	245	282	P.R. of Korea	423	512
9	Brazil	293	275	Austria	451	412
10	Switzerland	214	244	UK	353	383
11	Australia	169	239	Australia	235	375
12	Canada	213	229	Italy	396	360
13	Netherlands	236	219	Netherlands	476	350
14	Austria	236	212	Switzerland	339	325
15	Portugal	168	194	China	175	236
Total		8,294	9,120		11,968	12,054

* Source: ICCA; criteria international convention (associations): minimum of 50 participants, held regularly, must be held in at least three countries

**Source: UIA; criteria international convention: minimum of 250 participants of which at least 40% from abroad, with a minimum of five nationalities. Minimum duration two days, non-corporate market (associations and governmental conventions)

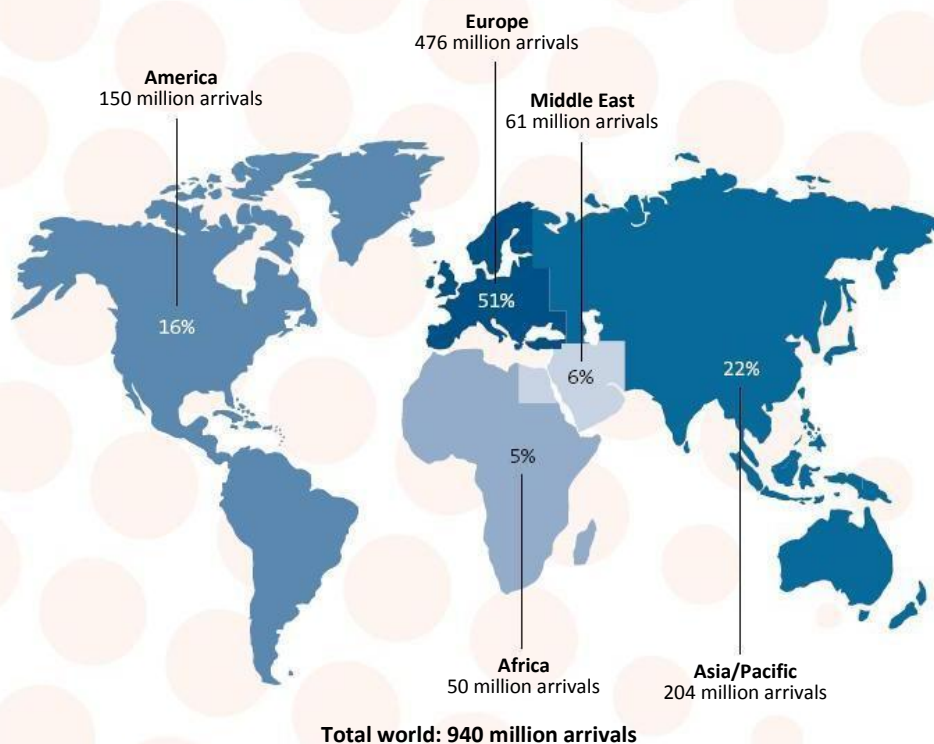
Spend by inbound guests in the Netherlands in 2010 by reason for visit (in euros)



Source: NBTC, inbound tourism survey 2009, analysis NBTC 2010

International tourism

Number and share of international arrivals by region in 2010*



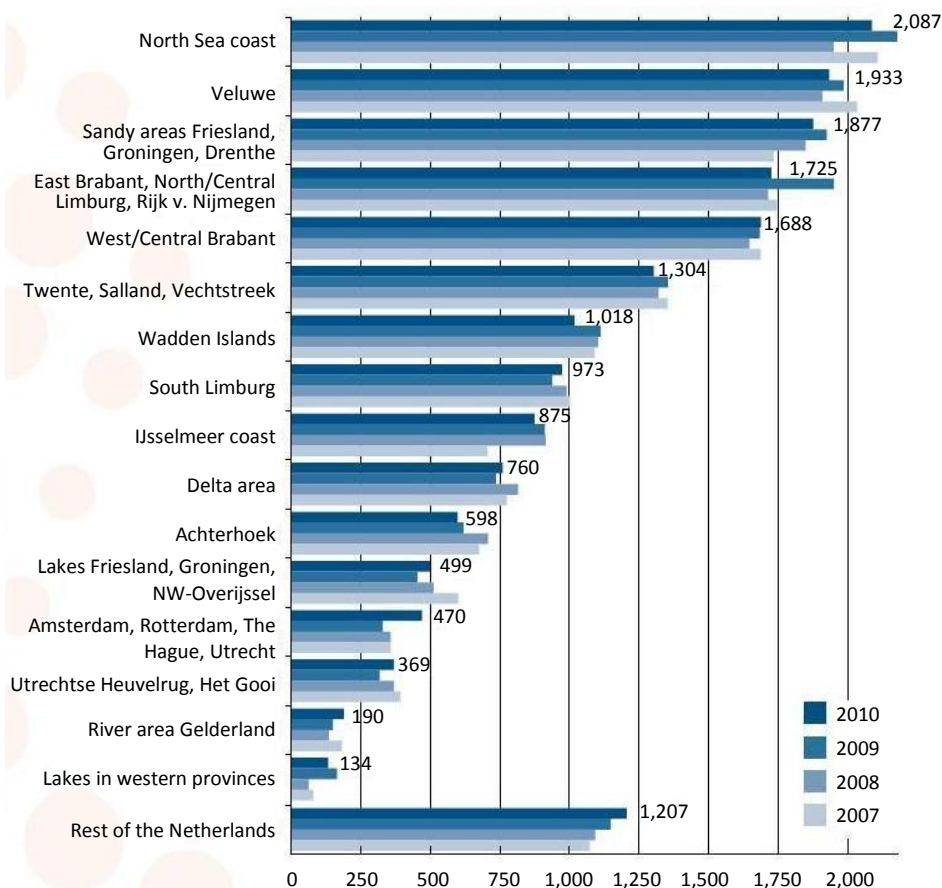
Domestic tourism

Domestic holidays by the Dutch by length of stay (x million)

	2006	2007	2008	2009	2010	cf. 2010/ 2009
2 - 4 days	9,0	9,1	8,9	9,3	9,2	0%
5 - 8 days	6,0	5,8	5,9	6,0	5,7	-5%
9 days and more	2,9	2,7	2,6	2,7	2,8	3%
Total domestic	17,8	17,6	17,4	18,0	17,7	-1%

Source: NBTC-NIPO Research, ContinuVakantieOnderzoek (CVO)

Domestic holidays by the Dutch by destination (x 1,000)



Source: NBTC-NIPO Research, CVO

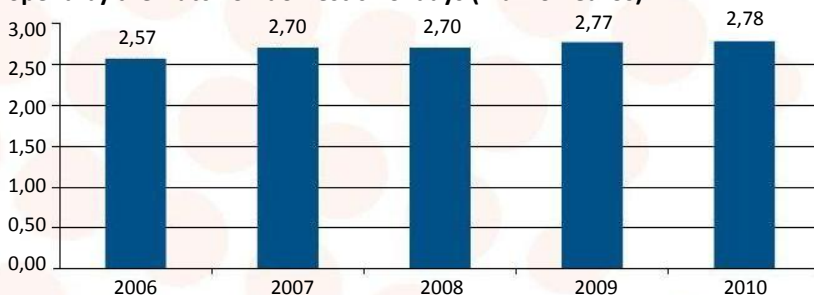
Domestic holidays by the Dutch by type of accommodation (x million)

	2006	2007	2008	2009	2010	cf. 2010/2009
Holiday cottage	5,2	5,5	5,4	5,7	5,4	-5%
Hotel, guest house	3,0	3,3	3,2	3,4	3,6	8%
Campsite	2,8	2,8	2,7	2,8	2,7	-3%
Other	2,5	2,2	2,3	2,0	2,3	7%
Total, excl. holidays in own accommodation	13,6	13,8	13,6	13,9	14,0	1%
Holidays in own accommodation*	4,2	3,8	3,8	4,0	3,7	-8%

Source: NBTC-NIPO Research, CVO

* Holidays in own accommodation: are spent in second homes, on own boats, in own on-site caravans

Spend by the Dutch on domestic holidays (x billion euros)



Source: NBTC-NIPO Research, CVO

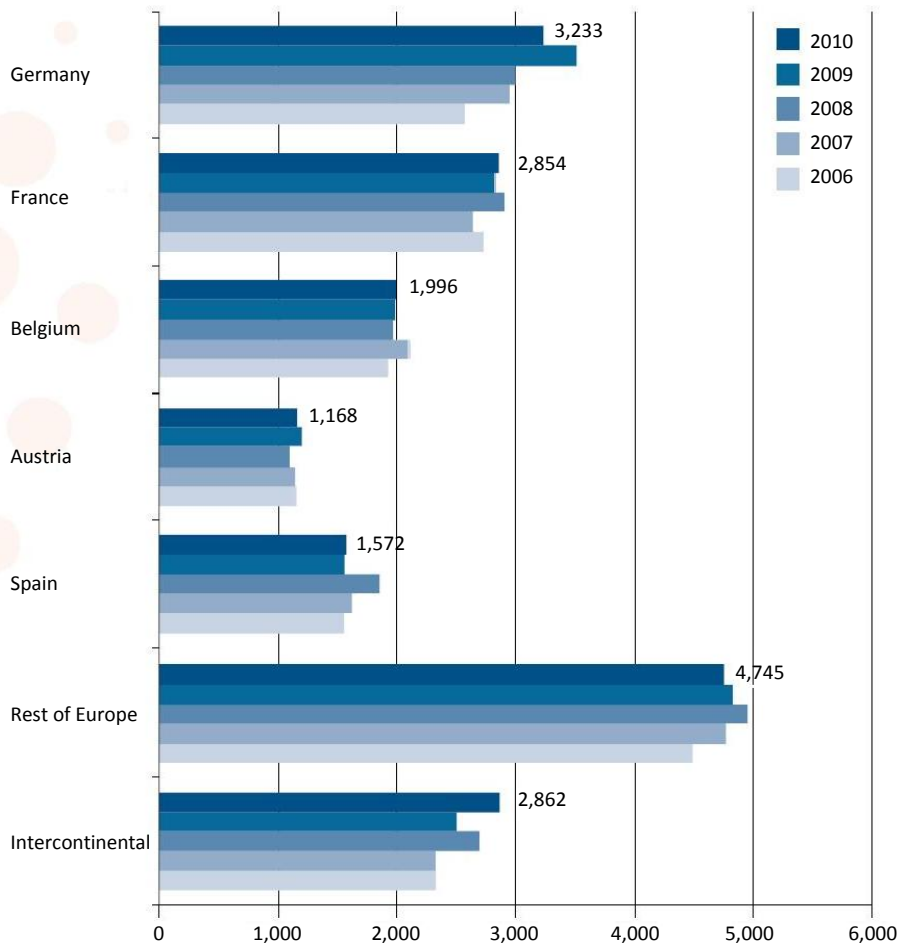
Outbound tourism

Outbound holidays by the Dutch (x million)

	2006	2007	2008	2009	2010	cf. 2010/ 2009
2 - 4 days	3,2	3,7	3,4	3,8	3,6	-5%
5 - 8 days	5,2	5,1	5,6	5,6	5,6	0%
9 days and more	8,4	8,8	9,5	9,0	9,3	3%
Total	16,8	17,6	18,5	18,4	18,4	0%

Source: NBTC-NIPO Research, CVO

Outbound holidays by the Dutch by destination (x 1,000)



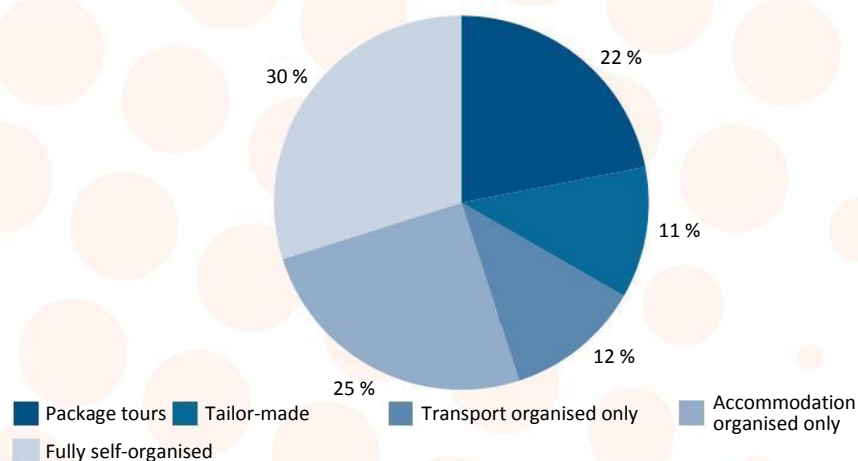
Source: NBTC-NIPO Research, CVO

Outbound holidays by the Dutch by type of accommodation (x million)

	2006	2007	2008	2009	2010	cf. 2010/ 2009
Hotel, B&B	6,9	7,4	7,7	7,7	7,8	1%
Campsite	2,9	2,9	3,0	3,1	3,1	0%
Holiday cottage	2,4	2,6	2,7	2,8	2,7	-5%
Apartment	2,0	1,9	2,0	2,1	2,0	-5%
Other	2,6	2,8	3,0	2,7	2,9	7%

Source: NBTC-NIPO Research, CVO

Organised outbound holidays by the Dutch in 2010



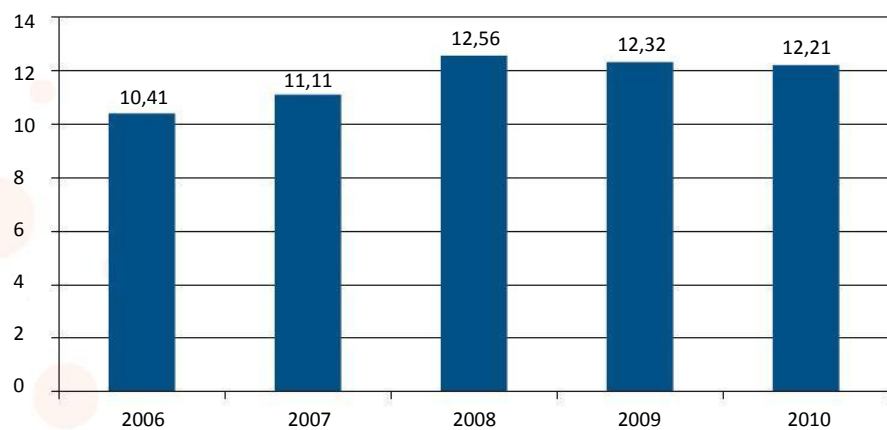
Source: NBTC-NIPO Research, CVO

Total number of outbound trips by the Dutch, organised by ANVR-affiliates (x 1,000)

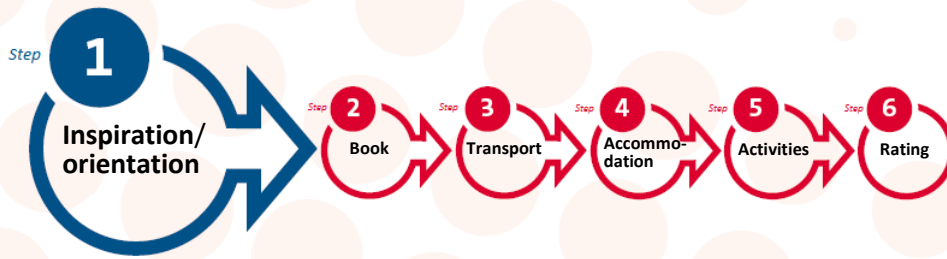
Summer 2010 + winter 2010/2011	Share 2010	Compared with 2009
By air	62%	5%
By own transport	27%	0%
By coach	5%	-8%
By train	2%	-4%
Cruise	1%	12%
Other	3%	-24%
Total	100%	2%

Source: ANVR-GfK travelscan

Dutch expenditure on outbound holidays (x billion euros)



Source: NBTC-NIPO Research, CVO

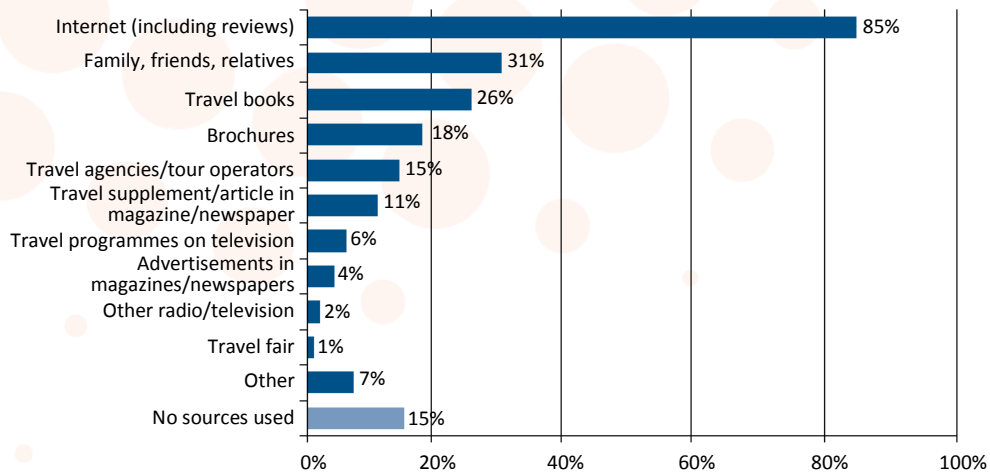


Use of information sources by the Dutch for a domestic day trip/short break

Websites	80%
Family, friends, relatives	43%
ANWB (Royal Dutch Touring Club)	39%
VVV (Tourist Information Centre)	37%
Travel guides	27%
Magazines/newspapers	17%
Television	15%
Social media	7%
Radio	6%
Other	2%
Other	3%
None of the above	3%

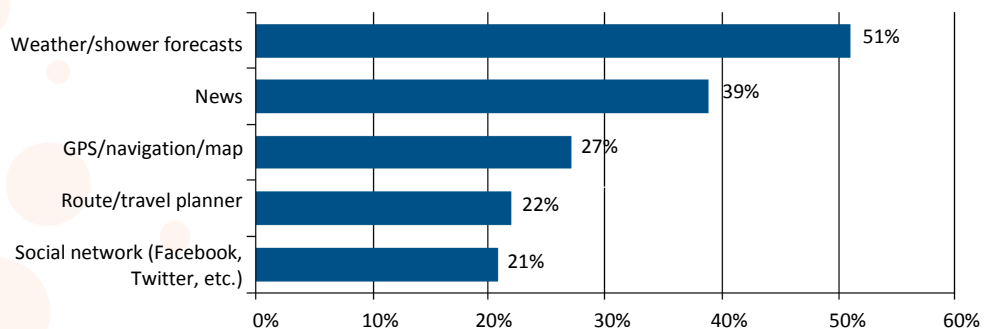
Source: Blauw Research, for VVV Nederland, 2011

Information sources used by foreigners for a holiday in the Netherlands in 2009



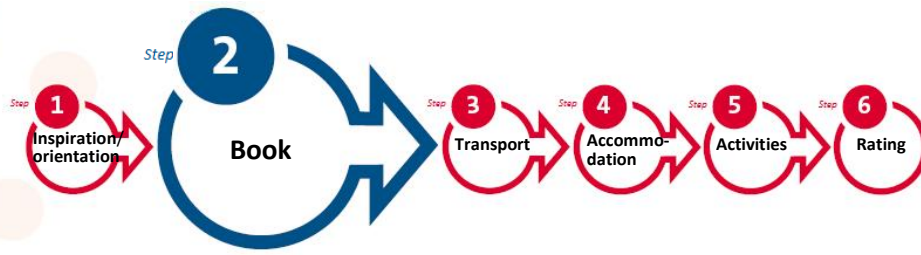
Source: NBTC, Inbound Tourism Survey

Top 5 most often used applications during domestic holidays in 2010

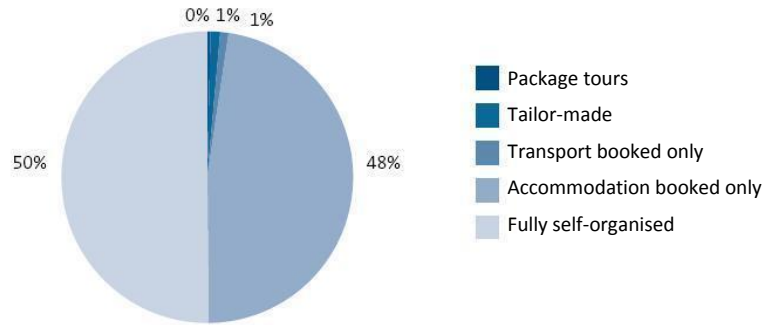


Source: NBTC-NIPO Research, 'Mobile internet, social media and holidays' study

Base: Dutch who own a smart phone and/or a tablet

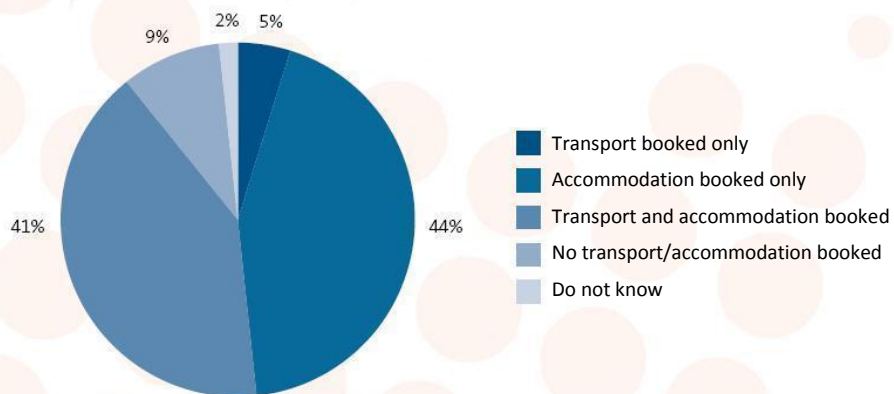


Organised domestic holidays in the Netherlands in 2010



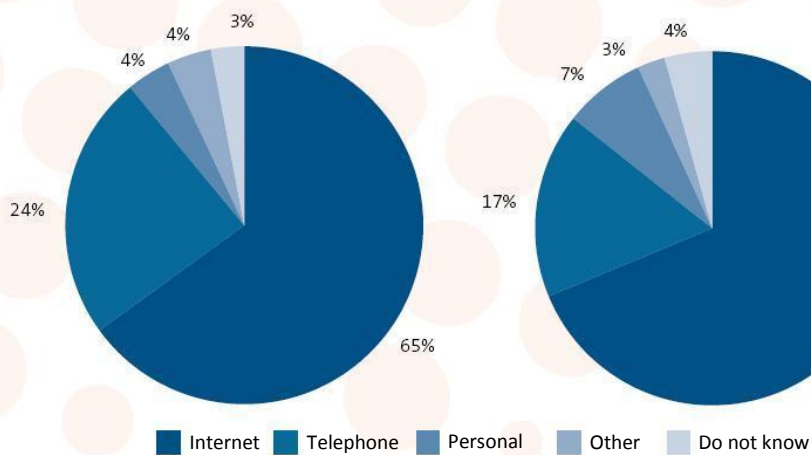
Source: NBTC-NIPO Research, CVO

Organised holidays by foreigners in the Netherlands in 2009



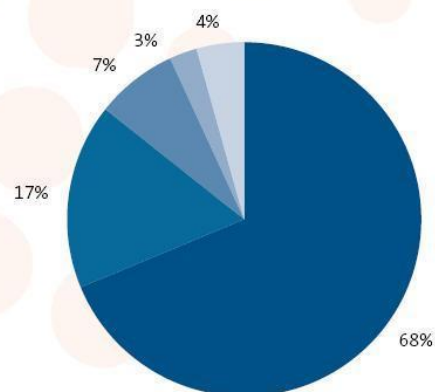
Source: NBTC, Inbound Tourism Survey

Way of booking domestic holidays by the Dutch in 2010

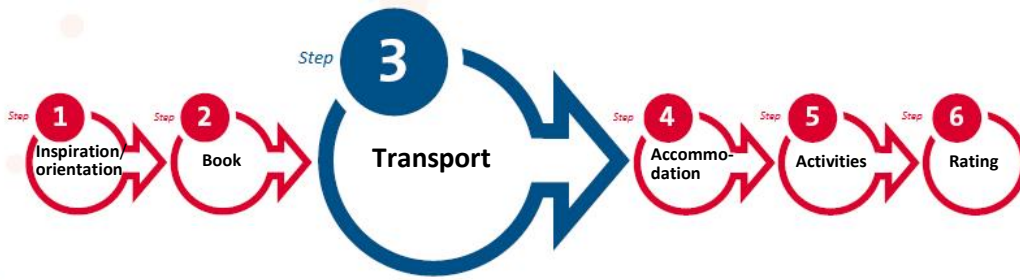


Source: NBTC-NIPO Research, CVO

Way of booking inbound holidays in the Netherlands in 2009



Source: NBTC, Inbound Tourism Survey

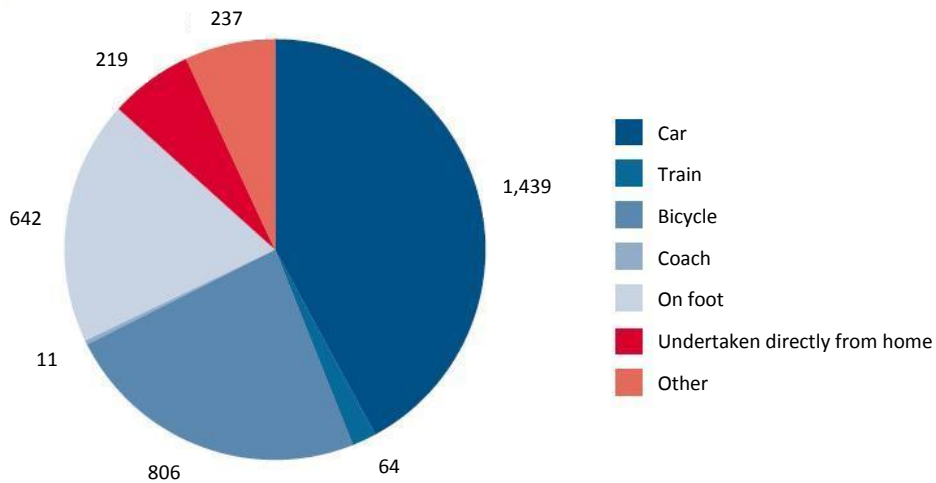


Type of transport to travel the longest distance of the trip in 2010 (x 1,000)

	Domestic holidays	Inbound travel to the Netherlands
Car	16,091	3,885
Plane	0	2,392
Train	809	503
Coach	105	335
Boat: own or rented/ferry	175	213
Bicycle	280	69
On foot	79	0
Other	167	171

Source: domestic holidays:
NBTC-NIPO Research, CVO
Source: inbound holidays:
NBTC, Inbound Tourism Survey 2009, analysis NBTC 2010

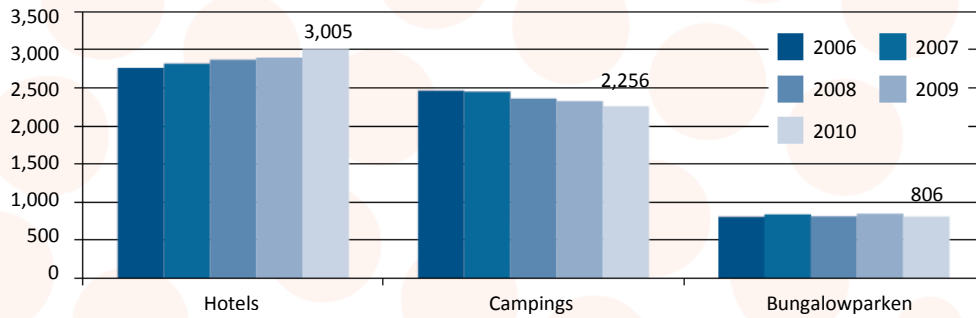
Leisure activities by the Dutch by type of transport in 2010 (x million)



Source: NBTC-NIPO Research, CVTO

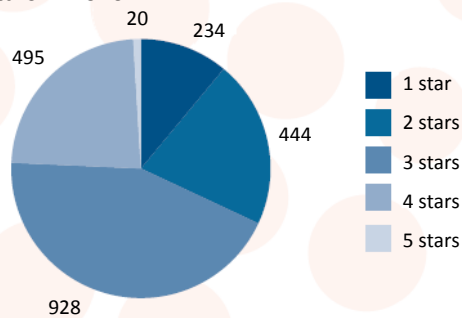


Development number of accommodations in the Netherlands by type of accommodation



Sources: CBS and Bedrijfschap Horeca en Catering

Number of hotels by stars in 2010



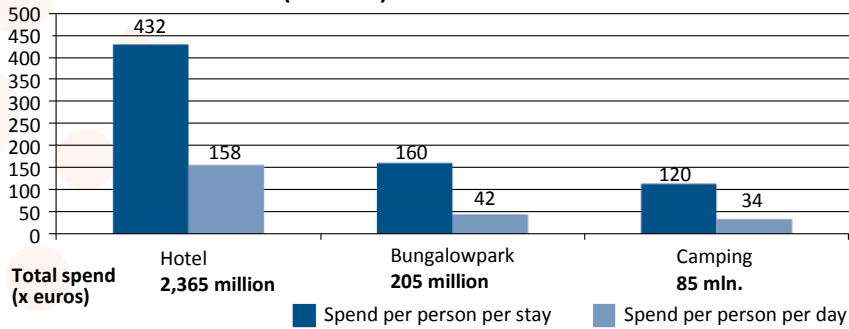
Source: Bedrijfschap Horeca en Catering

Number of guests by source country and type of accommodation in 2010

	Total domestic (the Netherlands)		Total inbound		
Hotels	10,499		8,727		
Campsites	2,749		734		
Holiday villages	4,584		1,323		
Top 5 source countries					
	Germany	GB	America	Belgium	France
Hotels	1,485	1,477	1,216	797	578
Campsites	467	38	3	82	45
Holiday villages	821	39	4	359	44

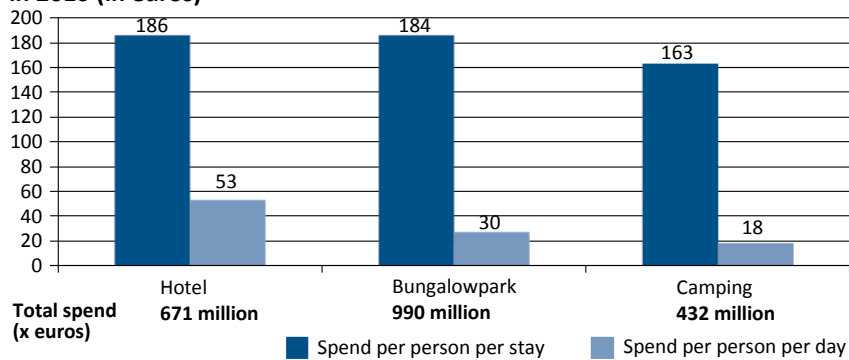
Source: CBS

Spend by inbound leisure guests in the Netherlands by type of accommodation in 2010 (in euros)



Source: NBTC, inbound tourism survey 2009, analysis NBTC 2010

Spend by Dutch tourists in the Netherlands by type of accommodation in 2010 (in euros)



Source: NBTC-NIPO Research, CVO

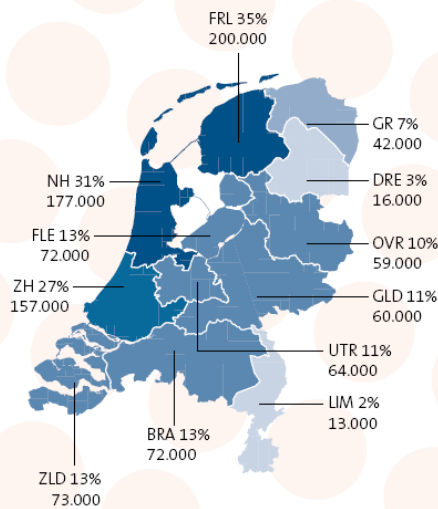
Holidays by the Dutch with cabin boats in 2009

	Own cabin boat	Cabin boat not owned
Number of holidays	576,000	94,000
Number of days	4,600,000	500,000
Total spend (excl. fixed costs)	76 million euro	20,5 million euro

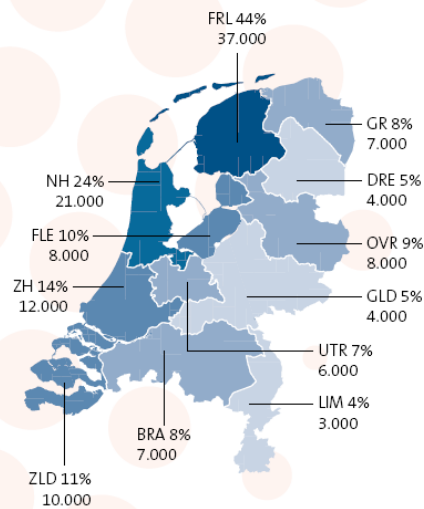
Source: NBTC-NIPO Research, boat panel

Destination province/provinces for holidays with:

Cabin boat



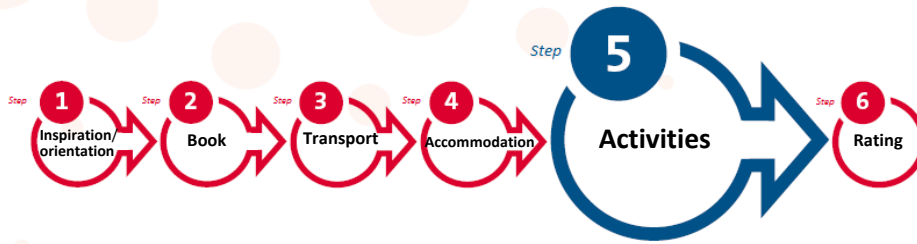
Cabin boat not owned



0-4% 5-9% 10-15% 25-30% >30% 0-5% 6-9% 10-15% 20-25% >30%

Source: NBTC-NIPO Research, boat panel

Base: boat holidays in the Netherlands through the province concerned



Activities undertaken by inbound leisure travellers in the Netherlands in 2009

Hiking	61%
Visit historic sites, places of interest	59%
Visit bar/café	59%
Shopping	55%
Fine dining	49%
Visit museum	47%
Visit beach for walking	39%
Canal cruise	35%
Visit area of scenic beauty, forest	31%
Red light district Amsterdam	29%
Biking	29%
Visit beach for sunbathing	19%
Clubbing	17%
Visit coffee shop/smart shop	16%
Visit family/friends	13%
Visit Zaanse Schans/Volendam/Marken	13%

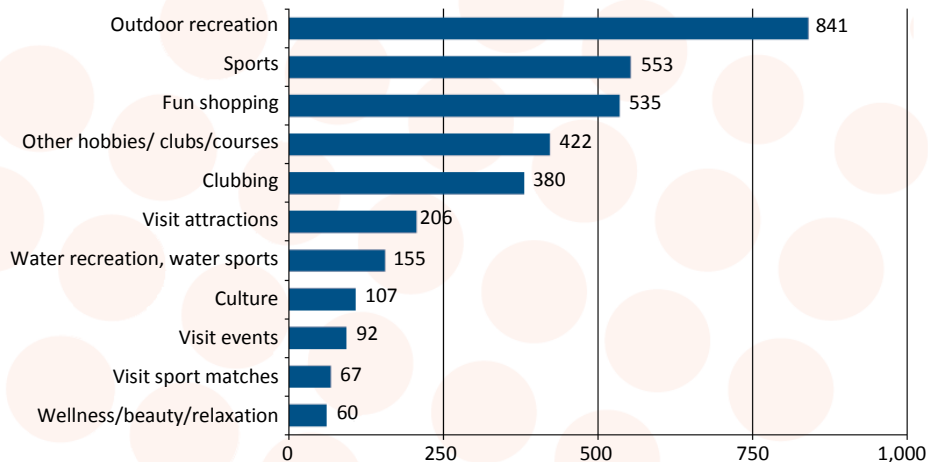
Source: NBTC, Inbound Tourism Survey

Activities undertaken by the Dutch during domestic holidays in 2010

Dining out	60%
Car trips	55%
Hiking	55%
Swimming	37%
Shopping	35%
Visit national park/nature reserve	28%
Bike trips	27%
Visit beach	19%
Visit places of interest	19%
Visit museum	12%
Visit amusement park	10%
Visit zoos, safari park, dolfinarium	8%
Sunbathing	8%
Clubbing	8%
Canal cruise	5%

Source: NBTC-NIPO Research, CVO

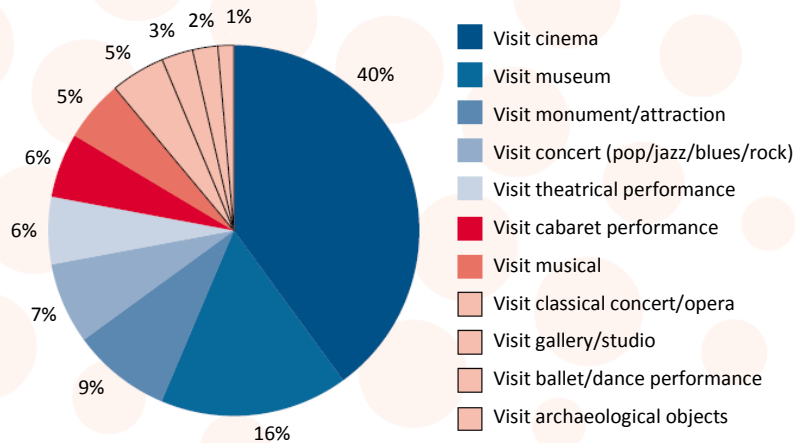
Leisure activities* undertaken by the Dutch in 2010 (x million)



Source: NBTC-NIPO Research, ContinuVrijetijdsOnderzoek (CVTO)

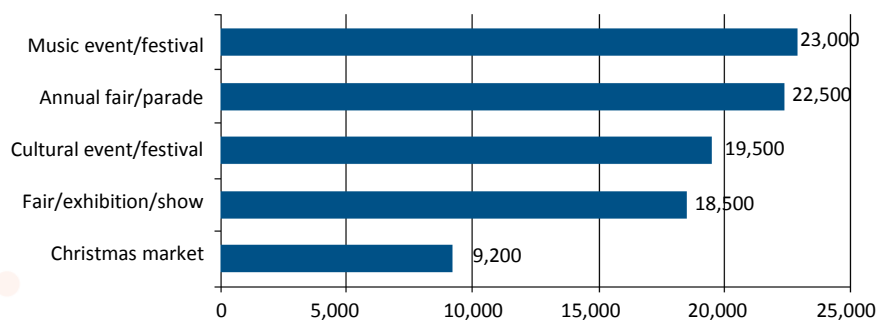
Leisure activity: day-activity (recreational) that is undertaken outside the home, with a minimum duration of one hour

Cultural activities undertaken by the Dutch in 2010



Source: NBTC-NIPO Research, CVTO

Events visited by the Dutch in 2010 (x 1,000)



Source: NBTC-NIPO Research, CVTO

Top 10 most visited Dutch amusement parks, zoos and museums in 2010 (x 1,000)

	2008	2009	2010
1. Efteling	3,290	4,000	3,900
2. Diergaarde Blijdorp (Rotterdam Zoo)	1,608	1,562	1,552
3. Burgers' Zoo	1,520	1,525	1,470
4. Slagharen Theme Park & Resort	1,438	1,572	1,469
5. Van Gogh Museum	1,470	1,451	1,433
6. Amusement Park Duinrell (incl. Tikibad)	1,356	1,349	1,358
7. Natura Artis Magistra	1,238	1,208	1,135
8. Anne Frank House	999	986	1,050
9. Ouwehands Zoo Rhenen	910	930	905
10. Rijksmuseum Amsterdam	970	976	900

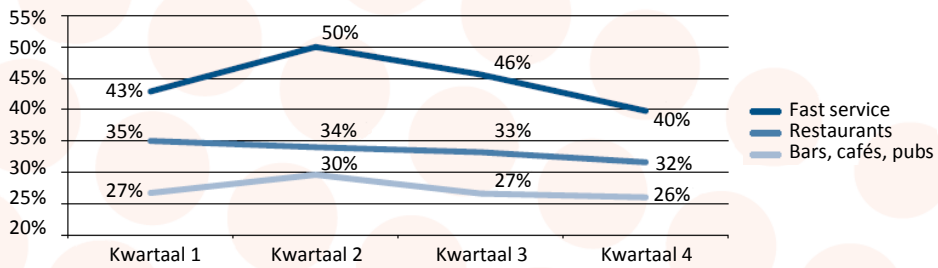
Source: Respons – NBTC, Top 50 attractions

Top 10 most visited Dutch museums in 2010 (x 1,000)

	2008	2009	2010
1. Van Gogh Museum	1,470	1,450	1,433
2. Anne Frank House	1,000	990	1,050
3. Rijksmuseum Amsterdam	984	870	900
4. Hermitage Amsterdam	104	630	650
5. Science Centre NEMO	405	401	504
6. Netherlands Open Air Museum	450	450	440
7. The Railway Museum	315	300	350
8. Paleis Het Loo	316	360	291
9. Museum Boijmans van Beuningen	238	225	300
10. Gemeentemuseum Den Haag	273	250	290

Source: Nederlandse Museumvereniging 2011

Bars/restaurant-visitors 2010 by quarter (% of Dutch population)

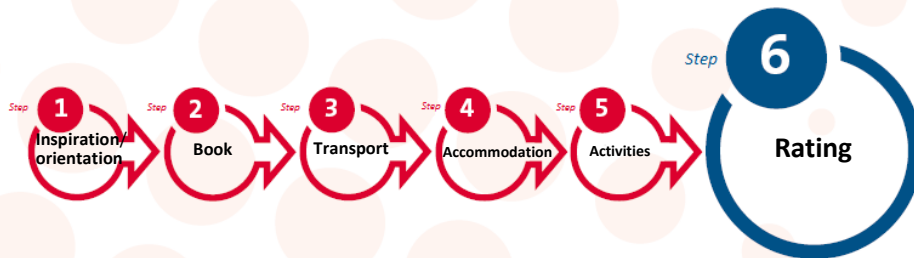


Source: Bedrijfschap Horeca en Catering

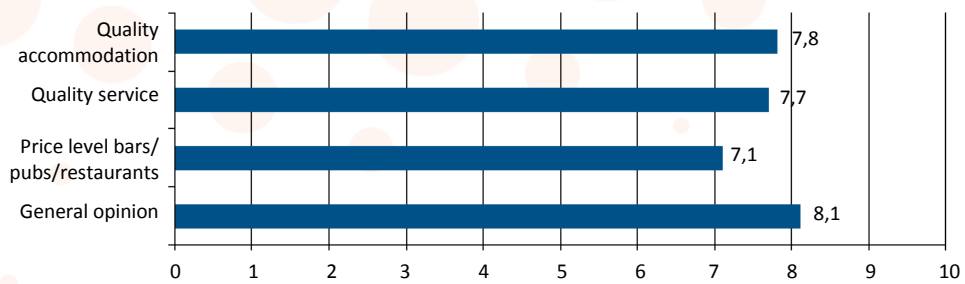
Average spend in bars/restaurants per visit (in euros)

	2006	2007	2008	2009	2010
Bars, cafés, pubs	11.1	11.1	11.0	10.6	11.2
Fast service	4.9	5.0	5.1	5.2	5.5
Restaurants	17.0	17.1	17.9	18.1	19.1

Source: Bedrijfschap Horeca en Catering

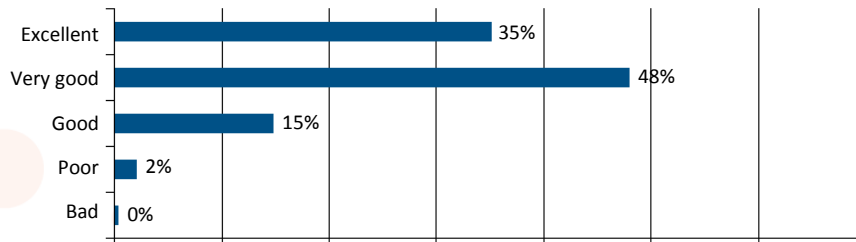


General rating domestic holidays by the Dutch in 2010



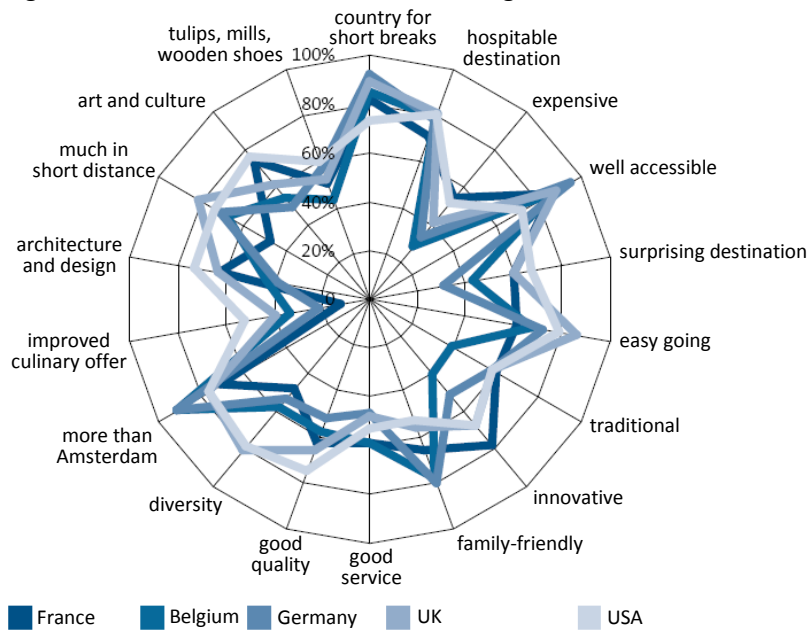
Source: NBTC-NIPO Research, CVO

Rating of inbound holidays by leisure visitors to the Netherlands by foreign guests in 2009



Source: NBTC, Inbound Tourism Survey

Image of Holland as a leisure destination among visitors in 2008



Source: NBTC, Holland-image research



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