

Статистика индустрии туризма Голландии

Общие данные

| Статистика | |
|-------------------------------------|--|
| <u>ВВП</u> (номинальный) | \$880,39млрд. |
| <u>ВВП на душу населения</u> по ППС | \$50 793 |
| <u>Инфляция (ИПЦ)</u> | 2,1% (февраль 2014) |
| <u>Уровень безработицы</u> | 7,2% (март 2014) |
| Основные отрасли | <u>Машиностроение</u> , <u>нефтехимия</u> , <u>авиастроение</u> , <u>судостроение</u> , <u>чёрная металлургия</u> , <u>текстильная промышленность</u> , мебельная промышленность, целлюлозно-бумажная промышленность, производство пива, производство одежды, туризм |
| Население | 10 904 224 |
| | |

Политика в сфере туризма

- ▶ поддержка предпринимательства
- ▶ устойчивое развитие туризма
- ▶ повышение количества иностранных туристов в Нидерландах

Вклад в экономику

Summary tables: Estimates & Forecasts

| Netherlands | 2013 EURbn ¹ | 2013 % of total | 2014 Growth ² | EURbn ¹ | 2024 % of total | Growth ³ |
|--|----------------------------|--------------------|-----------------------------|--------------------|--------------------|---------------------|
| Direct contribution to GDP | 12.3 | 2.1 | 3.4 | 18.0 | 2.5 | 3.5 |
| Total contribution to GDP | 35.6 | 5.9 | 2.6 | 51.3 | 7.3 | 3.5 |
| Direct contribution to employment ⁴ | 492 | 6.7 | 2.7 | 605 | 7.8 | 1.8 |
| Total contribution to employment ⁴ | 763 | 10.5 | 2.2 | 932 | 12.0 | 1.8 |
| Visitor exports | 16.4 | 3.1 | 5.6 | 23.1 | 3.3 | 2.9 |
| Domestic spending | 15.1 | 2.5 | 0.7 | 22.1 | 3.1 | 3.8 |
| Leisure spending | 26.2 | 1.7 | 3.3 | 37.9 | 2.1 | 3.4 |
| Business spending | 5.3 | 0.3 | 3.2 | 7.3 | 0.4 | 2.9 |
| Capital investment | 3.1 | 3.3 | 6.3 | 5.0 | 4.4 | 4.4 |

¹2013 constant prices & exchange rates; ²2014 real growth adjusted for inflation (%); ³2014-2024 annualised real growth adjusted for inflation (%); ⁴000 jobs

| Destinations | | International Tourist Arrivals | | | | | | | International Tourism Receipts | | | | | |
|-----------------------|--------|--------------------------------|----------------|----------------|----------------|------------|------------|------------|--------------------------------|----------------|----------------|----------------|----------------|-------------|
| | | (1000) | | | | Change (%) | | | Share (%) | (US\$ million) | | | | Share (%) |
| Series ¹ | | 2010 | 2011 | 2012 | 2013* | 11/10 | 12/11 | 13*/12 | 2013* | 2010 | 2011 | 2012 | 2013* | 2013* |
| Europe | | 484,842 | 516,020 | 534,376 | 563,441 | 6.4 | 3.6 | 5.4 | 100 | 411,361 | 464,733 | 454,047 | 489,253 | 100 |
| Northern Europe | | 62,654 | 64,480 | 65,088 | 68,862 | 2.9 | 0.9 | 5.8 | 12.2 | 59,353 | 66,323 | 67,631 | 74,210 | 14.3 |
| Denmark | TF | 8,744 | 7,864 | 8,068 | .. | -10.1 | 2.6 | .. | .. | 5,853 | 6,783 | 6,566 | 6,967 | 1.5 |
| Finland | TF | 3,670 | 4,192 | 4,226 | .. | 14.2 | 0.8 | .. | .. | 3,051 | 3,820 | 3,881 | 4,017 | 0.8 |
| Iceland | TF | 489 | 566 | 673 | 808 | 15.8 | 19.0 | 20.1 | 0.1 | 561 | 750 | 863 | 1,055 | 0.2 |
| Ireland | TF | 7,134 | 7,630 | 7,550 | .. | 7.0 | -1.0 | .. | .. | 4,118 | 4,190 | 3,883 | 4,429 | 0.9 |
| Norway | TF/TCE | 4,767 | 4,963 | 4,375 | 4,734 | 4.1 | -11.9 | 8.2 | 0.8 | 4,707 | 5,308 | 5,442 | 5,661 | 1.2 |
| Sweden | TCE/TF | 4,951 | 9,959 | 10,914 | .. | 101.1 | 9.6 | .. | .. | 8,663 | 10,404 | 10,768 | 11,485 | 2.3 |
| United Kingdom | TF | 28,296 | 29,306 | 29,282 | 31,169 | 3.6 | -0.1 | 6.4 | 5.5 | 32,401 | 35,069 | 36,228 | 40,597 | 8.3 |
| Western Europe | | 154,374 | 161,477 | 167,193 | 174,276 | 4.6 | 3.5 | 4.2 | 30.9 | 144,159 | 162,885 | 157,934 | 167,861 | 34.3 |
| Austria | TCE | 22,004 | 23,012 | 24,151 | 24,813 | 4.6 | 4.9 | 2.7 | 4.4 | 18,596 | 19,860 | 18,894 | 20,106 | 4.1 |
| Belgium | TCE | 7,186 | 7,494 | 7,591 | 7,642 | 4.3 | 1.3 | 0.7 | 1.4 | 12,146 | 13,114 | 13,014 | 13,500 | 2.8 |
| France | TF | 77,648 | 81,550 | 83,013 | .. | 5.0 | 1.8 | .. | .. | 47,013 | 54,753 | 53,550 | 56,098 | 11.5 |
| Germany | TCE | 26,875 | 28,352 | 30,407 | 31,545 | 5.5 | 7.3 | 3.7 | 5.6 | 34,679 | 38,879 | 38,136 | 41,211 | 8.4 |
| Liechtenstein | TCE | 64 | 67 | 62 | 60 | 4.2 | -6.9 | -4.4 | 0.0 | .. | .. | .. | .. | .. |
| Luxembourg | TCE | 805 | 873 | 905 | .. | 8.4 | 3.7 | .. | .. | 4,119 | 4,831 | 4,617 | 4,819 | 1.0 |
| Monaco | THS | 279 | 295 | 292 | .. | 5.6 | -1.0 | .. | .. | .. | .. | .. | .. | .. |
| Netherlands | TCE | 10,883 | 11,300 | 12,205 | 12,797 | 3.8 | 8.0 | 4.9 | 2.3 | 12,883 | 14,348 | 13,743 | 15,580 | 3.2 |
| Lithuania | TF | 1,507 | 1,775 | 1,900 | .. | 17.8 | 7.0 | .. | .. | 958 | 1,323 | 1,317 | 1,467 | 0.3 |
| Poland | TF | 12,470 | 13,350 | 14,840 | 15,845 | 7.1 | 11.2 | 6.8 | 2.8 | 9,526 | 10,683 | 10,938 | 10,938 | 2.2 |
| Rep Moldova | TCE | 64 | 75 | 89 | 96 | 17.9 | 18.6 | 7.5 | 0.0 | 173 | 195 | 213 | 226 | 0.0 |
| Romania | TCE | 1,343 | 1,515 | 1,653 | 1,715 | 12.8 | 9.1 | 3.7 | 0.3 | 1,140 | 1,418 | 1,468 | 1,438 | 0.3 |
| Russian Federation | TF | 20,262 | 22,674 | 25,727 | 28,356 | 11.9 | 13.5 | 10.2 | 5.0 | 8,831 | 11,328 | 10,759 | 11,988 | 2.5 |

Цифры Голландии за 2013

- ▶ ~0.8 туриста на гражданина
- ▶ ~\$1.200 потратил 1 турист
- ▶ ~\$952.2 на гражданина

Цифры РФ за 2013

- ▶ ~0.2 туриста на гражданина
- ▶ ~\$413.8 потратил 1 турист
- ▶ ~\$82.04 на гражданина



NBTC
Holland Marketing

FORECAST INBOUND TOURISM 2014

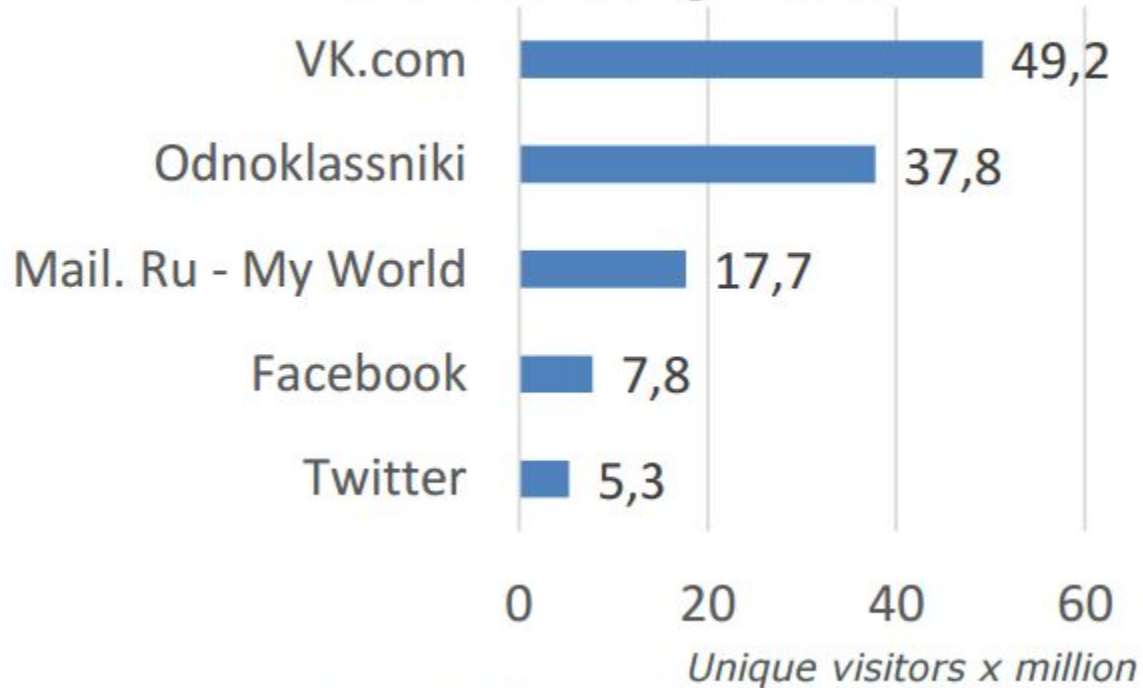
| ALL ACCOMMODATIONS | Guests (x 1,000) | | | | Nights (x 1,000) | | | |
|------------------------------|------------------|---------------|---------------|------------|------------------|---------------|---------------|-----------|
| | 2012 | 2013 | 2014* | +/- | 2012 | 2013 | 2014* | +/- |
| <i>Europe</i> | 9.744 | 10.286 | 11.255 | 9% | 25.112 | 27.214 | 29.685 | 9% |
| - Germany | 3.209 | 3.495 | 3.915 | 12% | 11.284 | 12.579 | 13.905 | 11% |
| - Belgium | 1.537 | 1.673 | 1.840 | 10% | 3.945 | 4.393 | 4.780 | 9% |
| - UK | 1.662 | 1.680 | 1.865 | 11% | 3.217 | 3.257 | 3.670 | 13% |
| - France | 666 | 680 | 725 | 7% | 1.319 | 1.357 | 1.425 | 5% |
| - Switzerland | 224 | 231 | 260 | 13% | 464 | 488 | 555 | 14% |
| - Italy | 457 | 461 | 510 | 10% | 935 | 955 | 1.035 | 8% |
| - Spain | 427 | 395 | 410 | 3% | 831 | 769 | 795 | 3% |
| - Denmark | 141 | 144 | 140 | -4% | 291 | 298 | 295 | -1% |
| - Sweden | 143 | 142 | 145 | 2% | 260 | 272 | 260 | -5% |
| - Norway | 125 | 127 | 125 | -3% | 247 | 260 | 255 | -2% |
| - Russia | 169 | 203 | 190 | -6% | 362 | 442 | 405 | -8% |
| - Rest of Europe | 983 | 1.055 | 1.133 | 7% | 1.957 | 2.144 | 2.307 | 8% |
| <i>Americas</i> | 1.382 | 1.337 | 1.420 | 6% | 2.450 | 2.425 | 2.565 | 6% |
| - US | 978 | 926 | 980 | 6% | 1.667 | 1.612 | 1.690 | 5% |
| - Canada | 138 | 140 | 140 | 0% | 262 | 272 | 260 | -4% |
| - Brazil | 116 | 119 | 130 | 10% | 241 | 257 | 270 | 5% |
| <i>Asia</i> | 798 | 875 | 995 | 14% | 1.443 | 1.574 | 1.810 | 15% |
| - Japan | 142 | 152 | 150 | -1% | 242 | 257 | 245 | -5% |
| - China (incl. Hong Kong) | 196 | 217 | 255 | 18% | 314 | 354 | 400 | 13% |
| - India | 78 | 80 | 87 | 9% | 144 | 147 | 160 | 9% |
| - Indonesia | 33 | 38 | 43 | 13% | 64 | 72 | 79 | 10% |
| <i>Australia and Oceania</i> | 170 | 165 | 192 | 16% | 339 | 329 | 376 | 14% |
| <i>Africa</i> | 114 | 121 | 139 | 15% | 224 | 228 | 259 | 14% |
| Total | 12.205 | 12.783 | 14.000 | 10% | 29.570 | 31.771 | 34.690 | 9% |

| Number of hotel stars | Russian visitors 2013 |
|-----------------------|-----------------------|
| | 7% |
| ★ | 2% |
| ★ ★ | 5% |
| ★ ★ ★ | 30% |
| ★ ★ ★ ★ | 44% |
| ★ ★ ★ ★ ★ | 13% |

Russian overnight guests in Dutch cities (2013)



Most visited social network sites in July 2013

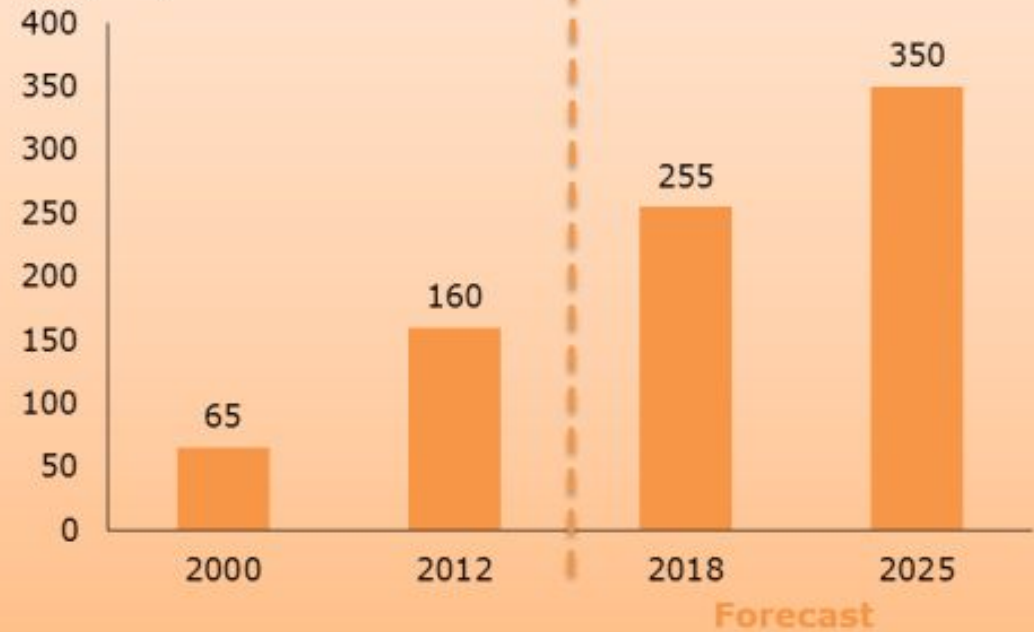


(Source: DigitalStrategyConsulting, 2013)



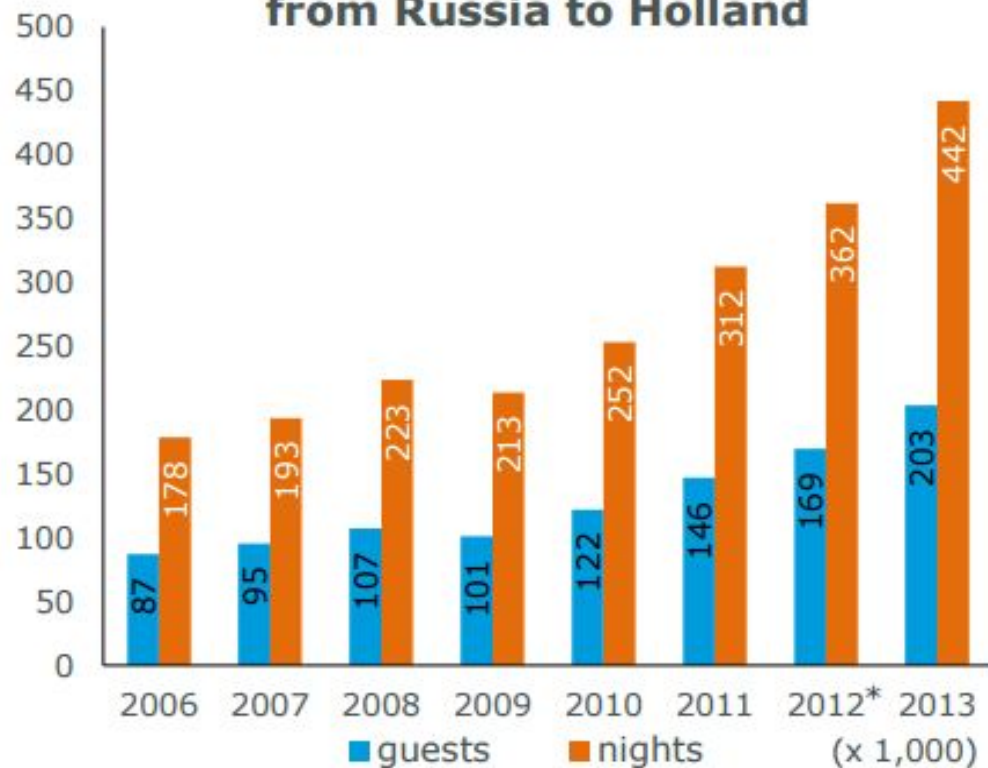
Development incoming tourism from Russia

Guests
(x 1,000)



Source: CBS, forecast UNWTO & Tourism Economics (analysis NBTC)

Development number of guests from Russia to Holland



* Change in research method

203,000 Russians visited Holland in 2013

This is a grow of 20% compared to 2012. The number of guests concerns visits of Russians with business or leisure motives. After a decrease of the number of Russian overnight guests in 2009 due to the recession, the number shows a positive development since 2010.

Russia is the 10th country of origin in terms of visitors to Holland

Russians form 1.6% of all overnight visitors to Holland. This share is expected to increase in the coming years.

(Source: CBS, 2014)

Spread visits

Russians visit Holland fairly equal throughout the year, only in the first quarter somewhat less.

(Source: CBS, 2014)

