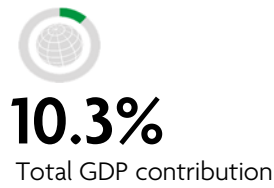


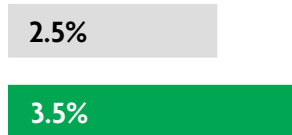
NETHERLANDS

2020 ANNUAL RESEARCH: KEY HIGHLIGHTS¹

GLOBAL DATA 2019



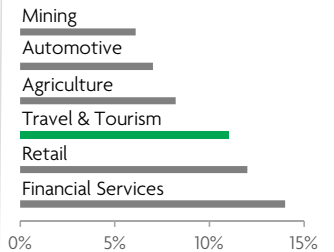
While the global economy grew by 2.5%,
Travel & Tourism grew significantly more at 3.5%



1 in 4 net new jobs were created by Travel & Tourism over the last five years



Global GDP impact by sector (2018 data). Share of total economy GDP



NETHERLANDS 2019 KEY DATA



CONTRIBUTION OF TRAVEL & TOURISM TO GDP

5.7% OF TOTAL ECONOMY

Total T&T GDP = EUR45.8BN (USD51.0BN)

+4.2%

2019 Travel & Tourism GDP growth vs **+1.7%** real economy GDP growth



CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

791.3 JOBS (000's)
(10.1% of total employment)



INTERNATIONAL VISITOR IMPACT

EUR19.3_{BN}

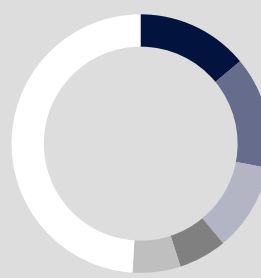
in visitor spend (**2.9%** of total exports)
(USD21.6BN)

INBOUND ARRIVALS



- 1. GERMANY **30%**
- 2. BELGIUM **13%**
- 3. UNITED KINGDOM **12%**
- 4. UNITED STATES **8%**
- 5. FRANCE **5%**
- **REST OF WORLD 32%**

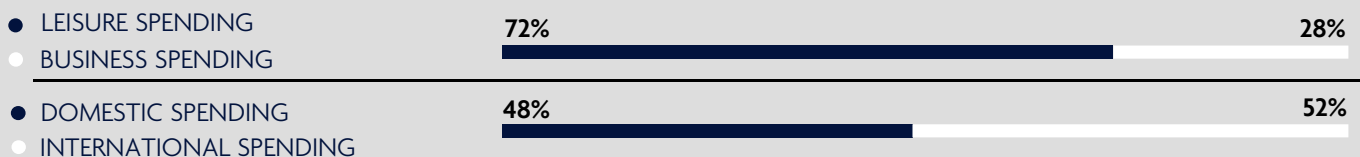
OUTBOUND DEPARTURES



- 1. GERMANY **14%**
- 2. FRANCE **14%**
- 3. SPAIN **11%**
- 4. ITALY **6%**
- 5. BELGIUM **6%**
- **REST OF WORLD 49%**

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

SECTOR CHARACTERISTICS (2019)



¹All values are in constant 2019 prices & exchange rates
As reported in March 2020