NETHERLANDS 2020 ANNUAL RESEARCH: KEY HIGHLIGHTS

GLOBAL DATA 2019

10.3% Total GDP contribution

330MN Jobs globally (1 in 10 jobs)

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

<table>
<thead>
<tr>
<th>Sector</th>
<th>Share of Total Economy GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>0%</td>
</tr>
<tr>
<td>Automotive</td>
<td>5%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>10%</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td>15%</td>
</tr>
<tr>
<td>Retail</td>
<td>10%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>10%</td>
</tr>
</tbody>
</table>

10.1% of total employment

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

EUR19.3BN
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)

- LEISURE SPENDING
- BUSINESS SPENDING
- DOMESTIC SPENDING
- INTERNATIONAL SPENDING

72% 28%
48% 52%

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