



Switzerland.

Market situation Netherlands.

Switzerland Convention & Incentive Bureau (SCIB).

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1 MARKET SITUATION AND OUTLOOK.

1.1 Economic situation

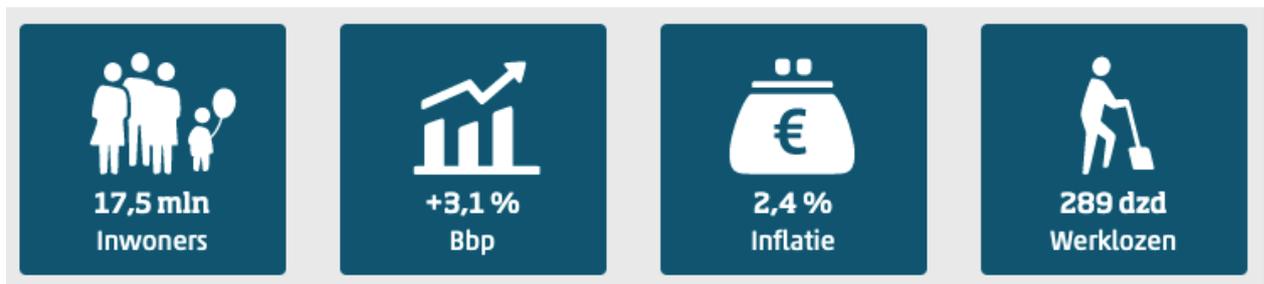
Summary of economic forecast (December 2021)

The Dutch economy will grow robustly in **2021 at 4.3%**, exceeding pre-crisis levels by the end of 2021, before expanding by **3.2% in 2022** and **1.8% in 2023**. Private consumption will drive growth as household savings rates continue to normalise after rising sharply early in the pandemic. Private investment is recovering more slowly due to lingering uncertainty. As the economy recovers and job vacancies increase, unemployment will remain at low levels.

(Source: OECD.org Netherlands Economic Snapshot)

Statistics Netherlands

May 2021



December 2021



(Source CBS)

1.2 Situation of the meeting industry and trends

The coronavirus has had a major impact on the event industry. CLC-Vectra is the trade association for companies and professionals involved in organising, accommodating, and facilitating trade fairs, conferences, meetings, events, incentives and entertainment.



The events sector is one of the sectors that has been hit hardest by the pandemic. The total loss of turnover amounts to EUR 11 billion. The recovery is expected to take years. A forecast by the research agencies Response and Leisure Advice, in close collaboration with CLC-VECTA and VVEM, assumes a loss of turnover of EUR 5 billion for 2021 (-69%). This is based on the results for the first three quarters and expectations for the fourth quarter. Normally, sector turnover amounts to EUR 7.4 billion on an annual basis. In 2020, the figure fell by a shocking 81% (more than EUR 6 billion). This means that the sector saw EUR 11 billion in turnover evaporate in two years. Expectations for the fourth quarter of 2021 are obviously better than for the first three quarters of this year, when virtually no events were possible, but are still significantly lower than the results for the same period in 2019. The noticeable reluctance among event attendees, measures such as the 75% maximum capacity at unplaced events, and travel restrictions for international visitors to trade fairs and conferences are the main reasons for the lower figures. In addition, events have a preparation time of several months.

(Source CLC-Vectra 14-11-2021)

1.3 Trends

- Effective corporate travel management requires regular and up-to-date insights.
- Changes need to be anticipated. Action must be taken quickly.
- Responsible travel (sustainability is top of many travel managers' priority lists).
- Short-term proposals will remain.
- A short response time is a plus.
- Flexibility will be key in planning ahead.

1.4 Market situation in the Netherlands

As of Wednesday 26 January, most locations in our country can once again open, under certain conditions. This means that restaurants and bars, cinemas, theatres, music venues, museums, zoos and amusement parks can reopen tomorrow. Shops, educational institutions, and contact-based services such as hair salons have already opened, and participating in indoor and outdoor sports activities and artistic and cultural activities has already been permitted. In addition, sports competitions and matches between different clubs will again be permitted as of tomorrow, as will spectators at all sports competitions and matches. The advice on self-quarantining for children under 18 will be relaxed.

The number of new cases is high, and many people are self-isolating or self-quarantining at home. The easing of restrictions will probably cause the number of Covid-19 patients in hospitals to increase. But despite the risks and uncertainties, the government believes it is responsible to take this big step. Because prolonging the measures that restrict our daily lives so much is also harmful to people's health and to society. On Tuesday 8 March, the government will decide if more restrictions can be eased.

General measures and guidance

- In general, all locations may be open from 5 a.m. to 10 p.m.
- Always stay 1.5 metres apart.



- Receive no more than 4 visitors aged 13 and over a day. Visit no more than 1 household a day.
- Do a self-test before visiting others or receiving visitors, and before going to a location where there are a lot of people.
- Face masks are mandatory for everyone aged 13 and over on public transport, at stations, on platforms and at bus and tram stops. You must also wear a face mask when walking around in public indoor spaces such as shops, museums, cinemas and hospitality venues. You can take your face mask off when seated in cinemas, theatres and hospitality venues.
- Wearing a face mask is advised wherever it is not possible to stay 1.5 metres apart, such as busy shopping streets.
- Assigned seats are mandatory in public indoor spaces such as restaurants, bars, theatres and cinemas.
- Everyone aged 13 and over must show a coronavirus entry pass at locations where this is mandatory, such as restaurants, bars, theatres and music venues, museums, cinemas, zoos, amusement parks, saunas and casinos. At sports facilities, a coronavirus entry pass is required for people aged 18 and over.
- At locations where there is a continuous flow of people, such as museums, capacity is limited to 1 visitor per 5 square metres, up to a maximum of 1,250 in each space.
- Maximum capacity at locations with assigned seating is equal to the number of visitors that can be accommodated 1.5 metres apart. (This is around 1/3 of normal capacity.)
- No more than 1,250 visitors are allowed at indoor locations for sports, events, culture and the arts.
- Events without assigned seating, such as festivals, are not yet permitted.
- Large events (with more than 1,250 visitors) with assigned seating may only take place outdoors.
- Work from home. If that is not possible, always stay 1.5 metres apart at work.

Quarantine

The advice on self-quarantining is changing.

If you have had contact with someone who has tested positive for coronavirus, you do not have to self-quarantine if:

- you have no symptoms

AND

- you are a pupil at primary school or secondary school, or a child that goes to day-care, OR
- you are a student younger than 18 at a secondary vocational education (MBO) or higher education (HBO or university) institution; OR
- you have established together with your employer that your role concerns an essential operational process, and you satisfy the conditions set out at Rijksoverheid.nl (“Quarantine and workers in essential operational processes”, in Dutch); OR
- you received your booster vaccination at least one week ago; OR
- you tested positive for coronavirus less than 8 weeks ago.

If you have symptoms of COVID-19:

- stay at home and do a self-test immediately.



- if the result of the self-test is positive, get tested by the municipal health service (GGD) as soon as possible.
- if your test result is positive, self-isolate at home.

In all cases, avoid contact with older people and people in at-risk groups for 10 days after your last contact with someone who has tested positive for coronavirus. For the most up-to-date information on the quarantine rules, go to the Quarantine Check. Keep in mind that the National Institute for Public Health and the Environment (RIVM) and the GGD need to update their policy and procedures. This takes a little time, so their information might not be up to date right away.

Moving forward together

We have been fighting the coronavirus pandemic for nearly two years. Not only have we seen how difficult it can be to cope with measures that restrict us in our daily lives, but we have also learned how difficult it can be to ease those restrictions. We all want to avoid a reversal of the reopening steps. This means we need to stay vigilant and help each other follow the general rules and guidance that still apply. Together we can move forward.
Health minister uses visual aids during presentation.

During the press conference health minister Ernst Kuipers used various visual aids to explain:

- the impact on society when a high number of people are self-isolating.
- that fewer people need to be hospitalised if they have been vaccinated, especially after a booster injection.

1.5 RFP situation in the Netherlands

After the summer holidays, the market started slowly. Most of the RFPs (requests for proposals) were for 2022. December 2021 saw another lockdown, and there have been no new RFPs until now.

2018 RFPs 67, carried out (CH) 46, overnight stays 7,146, turnover CHF 2,379,616.

2019 RFPs 72, carried out (CH) 36, overnight stays 5,861, turnover CHF 1,951,713.

2020 RFPs 31, carried out (CH) 11, overnight stays 1,766, turnover CHF 588,078.

2021 RFPs 31, carried out (CH) 5, overnight stays 328, turnover CHF 109,224.

2 TARGETS.

Qualitative:

- Maintain a strong market presence and remain aligned with market needs and



developments.

- Generate new awareness and keep existing clients interested in Switzerland.
- Continue to support buyers with our much-valued quality service.
- Deepen our connections.
- Update and evaluate the existing contacts database.
- Maintain a fast, proactive and professional approach towards the market.

3 CURRENT DATABASE SITUATION.

Kind	Contacts September 2021	Contacts December 2021
Agencies	549	560
Companies	472	473
Associations	197	199
Media	30	30
Wedding planners	10	10
Other	101	113
Total	1359	1385

Decrease of contacts due to Covid-19. In the database for March 2020, we had 1,650 contacts (22% lost their jobs). Now the database is growing again (16% have still not returned to the event business).

4 DETAILED MARKETING ACTIVITIES.

Further details of past, present, and future marketing activities can be found on www.stnet.ch, which users can access with their personal username and password.