



Switzerland.

Market situation Netherlands.

Switzerland Convention & Incentive Bureau (SCIB).

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2 MARKET SITUATION AND OUTLOOK.

2.1 Economic situation in the Netherlands

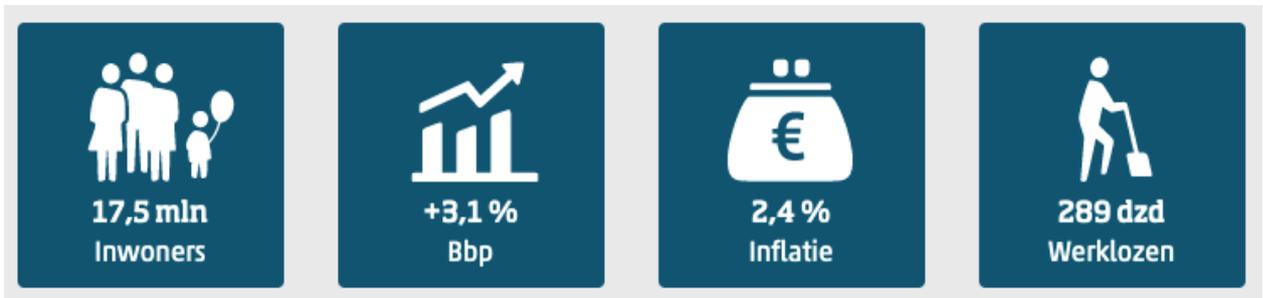
Economic Forecast Summary (June 2022)

The Dutch economy is projected to grow by 2.9% in 2022 and 1.1% in 2023. Inflation will remain high throughout 2022 averaging 9.2% due to continuing supply shortages and high energy prices, before falling back to 4.8% on average in 2023. Private consumption will continue to support growth but will be subdued as the rising cost of living erodes households' income. A tight labour market will help to keep unemployment low.

The pandemic highlighted job insecurity of non-standard work contracts, which represent a considerable share of employment. To prevent a long-lasting impact on workers, the top policy priority should be to improve the targeting of active labour market policies. Increasing resilience and inclusiveness of the labour market will necessitate rebalancing the employment protection on various types of contracts in the longer term.

(Source: OECD.org Netherlands Economic Snapshot)

Statistics Netherlands 2021



Statistics Netherlands 2022



(Source CBS)



2.2 Situation of the Meeting Industry in the Netherlands.

Monitor Festivals & Concerts 2022

Figures about Festivals and Concerts in the Netherlands

Festivals and concerts are big losers of the corona crisis. This is apparent from the new Monitor Festivals & Concerts that response publishes together with the Association of EvenementenMakers (VVEM). The number of festivals fell from more than 1,100 in 2019 to 155 in 2020 and 343 in 2021. This means that the festival sector fell back to the 1985 level in 2020. With only 1.4 million visits, the festival year 2020 will go down in the books as the worst year since the measurements. After the record year of 2019 with 207 concerts and 2.7 million visits, in 2020 the counter remained at 34 concerts with 328,000 visits. 94% of these took place pre-corona. The number dropped even further in 2021 to 29 and 298,000 visits. VVEM spokesperson Willem Westermann: "Festivals and concerts are the big corona losers. The figures for 2020 and 2021 are dramatic after the records of previous years. We hope that 2022 will be the year of recovery. We have seen that the sector has a lot of creativity, but you just must experience concerts and festivals live."

Date: 30-05-2022

Author: Response & VVEM

Source: VVEM

Cost inflation trends for events exhibitions and trade fairs

This study demonstrates the sector's hardships caused by the current increase in prices and the pandemic.

Critical price trends

"The survey shows that the entire industry is affected disproportionately by increases in price. The price for events with up to 250 people has increased by 58% compared to 2019, for events with 600 people by 55% and for events with a maximum of 1,500 people by 46%. To make matters worse, sales have decreased by -68.4% in 2022. Furthermore, there is only about half the number of skilled workers compared to 2019. Due to this, countless projects cannot be implemented, and valuable revenue is lost", Alexander Ostermaier, CEO of fwd: Bundesvereinigung Veranstaltungswirtschaft, registers with some concern.

Multidimensional reasons for increase in costs

Causes of the drastic price trends are manifold. The demand for live fairs and events may be increasing strongly. Specially to build new customer relations as the current R.I.F.E.L.-Auslastungsindex (capacity utilization index) shows. But this increasing demand meets fewer suppliers and less market capacities than before the pandemic. Furthermore, there have been massive general cost increases – from raw materials to transportation costs. At the same time, the shortage of skilled labour is a particular problem since the loss of workers is at -54.5% year-on-year. The need for workers remains and causes a painful bottleneck that also led to an increase in labour cost. Finally, event organisers and industry need to plan with new event restrictions for the winter which might shorten the live event year from twelve to six to nine months. The hygiene requirements linked to these restrictions also cause additional costs.

Effects of the increases on the industry

Hosts and commissioning companies will have to expect further cost increases. Thus, live events will be used more selectively in the future and will be equipped with more generous budgets. At the same time, the stricter requirements regarding sustainability and hygiene will become an inherent part of all fair and event concepts. There will also be changes in lead-in times and order deadlines both of which will increase due to suppliers' workload. Building



materials, AV technology and rented furniture will also register longer delivery times than in 2019.

Date: 08-7-2022

Author: Bundesvereinigung Veranstaltungswirtschaft & R.I.F.E.L.

Source: LivecomAlliance

Circularity within fairs and congresses

What is the situation and what are the options (for investing)?

In the coming years, the focus will increasingly be on sustainability. Sustainability is not only important for the future of our planet and not only for social responsibility, but also for the live communication industry. Clients and government attach increasing importance to sustainability and in the longer term it will save effort and money.

Date: 20-07-2022

Author: Julia Hagen

Source: BDO/CLC-VECTA

2.3 Meeting Trends in the Netherlands

Safety First

We will of course start with what no one can ignore. The big C. (Covid-19). Despite the busy vaccinating and boosting in Europe, we are still in a pandemic, and it is important to be careful and provide safety. Yet we have also been able to discover, develop and improve how we can meet as safely as possible for two years. From QR codes, access tests or a PCR test, to hygiene measures and keeping distance. And all destinations are eager to receive international visitors again. Various countries have therefore written meeting protocols with clear guidelines to meet each other safely. Because we meet safely together!

MVO and sustainability

Carbon neutral

Compensate for what you emit! There are more and more tools to calculate your emissions. From just your transport to everything you do and/or use.

Travelling by train

More and more companies are choosing to use the train (where possible) to travel to their destination. But in some cases, flying is more convenient, faster and sometimes the only option. Many European railway companies are working to improve and speed up their routes and connections, also between the different countries. So, the train is going to gain ground in the coming years. Also, between cities themselves or as a transfer from the airport to the city center, the train is increasingly the best and fastest choice! In addition, traveling by train offers many other advantages.

Green hotels and event locations

More and more hotels are becoming more sustainable to obtain a green key (or similar) certification. From complete renovations, clean energy sources, dealing with F&B differently (e.g., more vegan and local) and the processing of waste or (linen) cleaning. These efforts must also be demonstrated to receive and maintain certifications.



Authentic

Embrace your culture and history! In recent decades, many “world cities” have become busier, more commercial and larger. Many large (international) retail and food chains predominate in the city centres. Mass tourism means that the residents sometimes no longer feel at home in their own city. Here you see a clear change. Cities and regions are again opting for quality over quantity and for slow and authentic.

Local is the new global

Eat local

The local purchase of food is a trend that has been going on for a while and is almost impossible to imagine without the many (star) restaurants. Think of purchasing locally, for example directly from the farmer, growing vegetables and herbs yourself (organically) and consuming the products locally. Less transport is needed and there is no purchasing within a large chain, so that products often retain a fairer price, do not need to be processed and arrive fresher on your plate.

Slow food

Slow food preserves the cultural or traditional cuisine and with it the original use of crops, seeds, animals and agricultural practices of a region.

Hello wine

And nowadays we no longer must import “en masse” wines from France for a good glass of wine with a meal.

Off the beaten track

Nature is calling

Of course, it is wonderful to walk around in a bustling city and immerse yourself in the culture, beautiful architecture and best restaurants. But you also see that within a program the combination with nature is increasingly being made.

Date: 22-01-2022

Author: Diewertje Reekers

Source: GoMice

- Responsible travel (sustainability is top of many travel managers) priority lists.
- Short-term proposals will remain.
- Short response time is a plus.
- Flexibility will be key in planning ahead.
- Dutch are price sensible.
- Social media: 8 million (of 17,5 million) has an account on LinkedIn.

2.4 Actual situation covid-19

At this moment the situation is stable. Anyone aged twelve and older is expected to be able to get a repeat vaccination against the coronavirus from the second half of September. The Ministry of Health, Welfare and Sport will announce this on 29 July. Vulnerable people and healthcare workers are the first to be addressed.

2.5 RFP situation in the Netherlands

Many agencies have been shrunk after the pandemic. The ones who survived have a lot of inquiries, often last minute. Every day you see on social media vacancies, we are hiring.

2018 RFP's 67, Carried out (CH) 46, Overnights 7146, Turnover CHF 2'379'616.

2019 RFP's 72, Carried out (CH) 36, Overnights 5861, Turnover CHF 1'951'713.

2020 RFP's 31, Carried out (CH) 11, Overnights 1766, Turnover CHF 588'078.

2021 RFP's 31, Carried out (CH) 5, Overnights 328, Turnover 109'224.

2022 January-August RFP's 26 and Carried out (CH) 7

Several agencies are preparing teaser-packages. Switzerland is top of mind. Economically stable and a solid country, which you can reach by public transportation (train). Interesting destination with high quality standards and sustainable.

3 TARGETS.

Qualitative:

- Maintaining a strong market presence and remaining aligned with market needs and developments.
- Generating new awareness and keeping existing clients interested in Switzerland.
- Continue to support buyers with our much-valued quality service.
- Deepening our connections.
- Update and evaluate existing contacts database.
- Fast, pro-active, and professional approach towards the market.

4 CURRENT DATABASE SITUATION.

Kind	Contacts September 2021	Contacts September 2022
Agencies	549	565
Corporates	472	472
Association	197	197
Media	30	30
Wedding planner	10	12
Other	101	101
Total	1359	1377

Decrease of contacts due to COVID-19. Database March 2020 we had 1650 (22% lost their job) contacts. Now my database is growing again (still 17% not returned to the event business).



5 DETAILED MARKETING ACTIVITIES.

Further details of past, present, and future marketing activities can be found on stnet.ch, which can be accessed by using your personal username and password.