

Netherlands Hospitality - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 150 pages | Mordor Intelligence

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Report description:

Netherlands Hospitality Market Analysis

The Netherlands hospitality market is expected to grow from USD 25.67 billion in 2025 to USD 26.67 billion in 2026 and is forecast to reach USD 32.26 billion by 2031 at 3.88% CAGR over 2026-2031. Record tourism receipts of EUR 105 billion (USD 116.6 billion) in 2023 reflect a sharp 15% annual increase, while overnight stays topped 50 million guests in 2024, up 4% year on year. International arrivals surpassed the 2019 baseline by 2% in 2024, encouraged by the removal of health-related travel barriers, Schiphol's improving seat capacity, and active destination marketing that spotlights secondary provinces. Chain penetration reached 61%, well above the European mean of 35%, pointing to an operating landscape where scale-driven efficiencies, brand trust, and loyalty programs are pivotal. Budget and economy flags leverage standardized design, lean staffing models, and asset-light agreements to accelerate rollouts in university towns and logistics hubs, where cost-conscious leisure and business travelers converge. Simultaneously, robust direct-booking momentum, fueled by the EU Digital Markets Act (DMA), is shifting revenue away from high-commission online travel agencies (OTAs) toward proprietary channels that bolster net margins.

Netherlands Hospitality Market Trends and Insights

Inbound Leisure Tourism Recovery Post-Pandemic

Visitor volumes rebounded swiftly, with Amsterdam arrivals climbing to 117% of 2019 levels by 2023, propelled by pent-up demand and restored long-haul air links. NBTC projects total guests to rise from 49.4 million in 2023 to 61.1 million in 2035,

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representing a 39% jump in international tourism versus 13% in domestic travel, thereby diversifying source markets and reducing demand volatility. Asian feeder markets such as China and India are poised for triple-digit growth, while Spain and Italy are each forecast to double arrivals, broadening the opportunity for tailored cultural programming, language-specific services, and new air routes. Length of stay among corporate visitors to Amsterdam increased 16% despite a 13% fall in headcount, lifting RevPAR even as occupancy normalized, signaling a favorable shift toward higher spend per guest and stable base demand.

Expansion of Budget & Economy Chains

Cost-sensitive travel behavior and labor pressures spur operators to pursue asset-light franchises and conversions in the mid-scale range. Marriott plans to double its European Four Points Flex by Sheraton portfolio to 50 hotels by 2026, illustrating major brands' confidence in standardized, centrally procured models that keep operating costs in check. Wyndham's alliance with HR Group to add 25 Trademark Collection and Vienna House Easy hotels across the region, including major Dutch gateway cities, reinforces long-term appetite for value-oriented assets in transit corridors. Domestic flag Van der Valk extended its reach by acquiring the former NH Waalwijk as its 82nd property, evidencing a playbook that pairs local market insight with extensive brand loyalty. Lean staffing ratios, modular room prototypes, and multipurpose public spaces improve break-even thresholds, allowing entry into smaller municipalities and industrial clusters traditionally underserved by international brands.

Staffing Shortages & Wage Inflation

The sector needs 100,000 incremental employees but faces a 17% drop in vocational enrollment between 2017 and 2022, exacerbating the talent deficit. Rising minimum wages and mandatory pension contributions erode EBITDA margins, particularly for independent hotels operating without scale efficiencies. ABN Amro predicts 450 hospitality bankruptcies in 2025, attributing failures mainly to payroll burdens and energy-price pass-through constraints. The sector's workforce exceeded 508,000 in 2022, yet demand continues to outstrip supply, forcing operators to increase wages and improve working conditions to attract talent. This labor shortage particularly affects smaller independent properties that lack the resources to compete with chain operators' compensation packages and career development opportunities, accelerating consolidation trends as struggling properties exit the market or seek acquisition by larger operators with operational scale.

Other drivers and restraints analyzed in the detailed report include:

Rise of Direct Digital Booking Platforms
Corporate/MICE Demand from Amsterdam & Rotterdam Hubs
VAT Hike on Accommodations to 21% (Effective 2026)
Creating Pre-Booking Pull-Forward

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Independent Hotels commanded 63.65% revenue in 2025, illustrating a still-fragmented heritage within the Netherlands hospitality market despite above-average chain penetration. Chain Hotels, however, are projected to expand at a 4.64% CAGR to 2031 as operators capitalize on central procurement, brand recognition, and sophisticated demand-forecasting systems. This consolidation trend lifted the Netherlands hospitality market size for chain properties, enabling better labor scheduling and multi-property cross-selling that cushions the impact of wage inflation. Asset-light management contracts remain the preferred growth vehicle, letting owners tap global distribution without relinquishing property ownership. Independent operators, particularly family-run inns and small boutique hotels, are increasingly pursuing soft-brand affiliations to access loyalty programs while preserving unique guest experiences. Transaction volume rose to EUR 931 million (USD 1.03 billion) in 2024, up from EUR 185 million (USD 201.65 million) in 2023, underscoring investor appetite for Dutch stock with stable cash flows and favorable exit scenarios.

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The Netherlands hospitality market shows chains focusing expansion on secondary nodes such as Eindhoven, Arnhem, and Leeuwarden, where supply pipelines remain thin and land-use rules are less restrictive. Van der Valk's purchase of the former NH Waalwijk and CitizenM's exploration of a EUR 4 billion (USD 4.36 billion) equity event highlight how local and international investors perceive upside in scaling proven Dutch brands. Independent owners unable to finance energy-efficiency upgrades mandated by EU taxonomy are opting for strategic sales, joint ventures, or franchise conversions, likely pushing chain penetration further above 65% by decade-close. Greater consolidation also dilutes OTA bargaining power, as multi-property groups negotiate commission caps and preferential listing positions.

The Netherlands Hospitality Market Report is Segmented by Type (Chain Hotels, Independent Hotels), Accommodation Class (Luxury, Mid & Upper-Mid-Scale, Budget & Economy, Service Apartments), Booking Channel (Direct Digital, Otas, Corporate/MICE, Wholesale & Traditional Agents), and Geography (North Holland, South Holland, Utrecht, North Brabant, Gelderland, and Other). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Accor SA Marriott International Inc. Hilton Worldwide Holdings Inc. NH Hotel Group Van der Valk Hotels & Restaurants Fletcher Hotels Bastion Hotels CitizenM Hotels Leonardo Hotels (Fattal Group) Eden Hotels Radisson Hotel Group InterContinental Hotels Group (IHG) Minor Hotels Louvre Hotels Group Ruby Hotels Staycity Group Room Mate Group Meininger Hotels Postillion Hotels WestCord Hotels

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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