



NBTC

Nederlands Bureau
voor Toerisme &
Congressen

Short term rental market

~~DMOcracy, Copenhagen, May 2022~~

3 November 2022



Housing market in general major issue (1.000.000 houses needed 10 yrs)

Housing prices 'overheated'

Second house bought as investment (also by foreign investors)

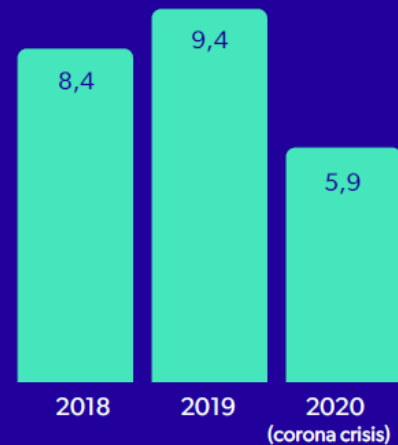
Winter ghost towns, Summer too crowded – community fabric

Holiday rental market (airbnb) was unregulated, lawmakers playing catchup

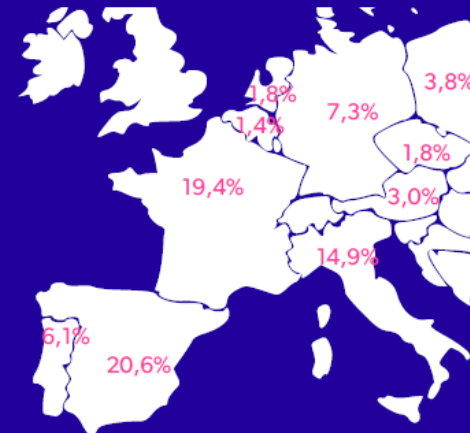
Key take outs:

- '19: 9,4 million guest nights private rental
- Represents approx 7% of total nights in NL
- NL share is 1,8% of euro-market (small share)
- 80%/20% foreign/ NL (except during covid)
- Most populair: North-Holland (AMS), South-Holland (Hague, Rotterdam & beach), Zeeland (beach)
- Ave # nights 3,4 (near EU ave)

Aantal gastovernachtingen (x 1 miljoen) in particuliere verhuur in Nederland

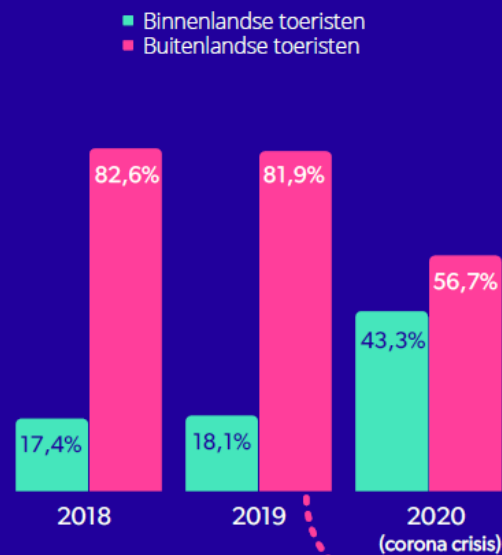


Aandeel gastovernachtingen per land in Europese particuliere verhuurmarkt in 2019



Europese Unie: 512 miljoen gastovernachtingen (=100%)

Percentage gastovernachtingen in Nederland naar land van herkomst (particuliere verhuur)



Top 3 provincies voor gastovernachtingen in particuliere verhuur in Nederland (2018-2020)

1. Noord-Holland

2. Zuid-Holland

3. Zeeland

Belangrijkste herkomstlanden:

29,9% Duitsland
8,4% Verenigde Staten
7,3% Verenigd Koninkrijk
5,9% Frankrijk
3,3% België



Self-occupancy obligation

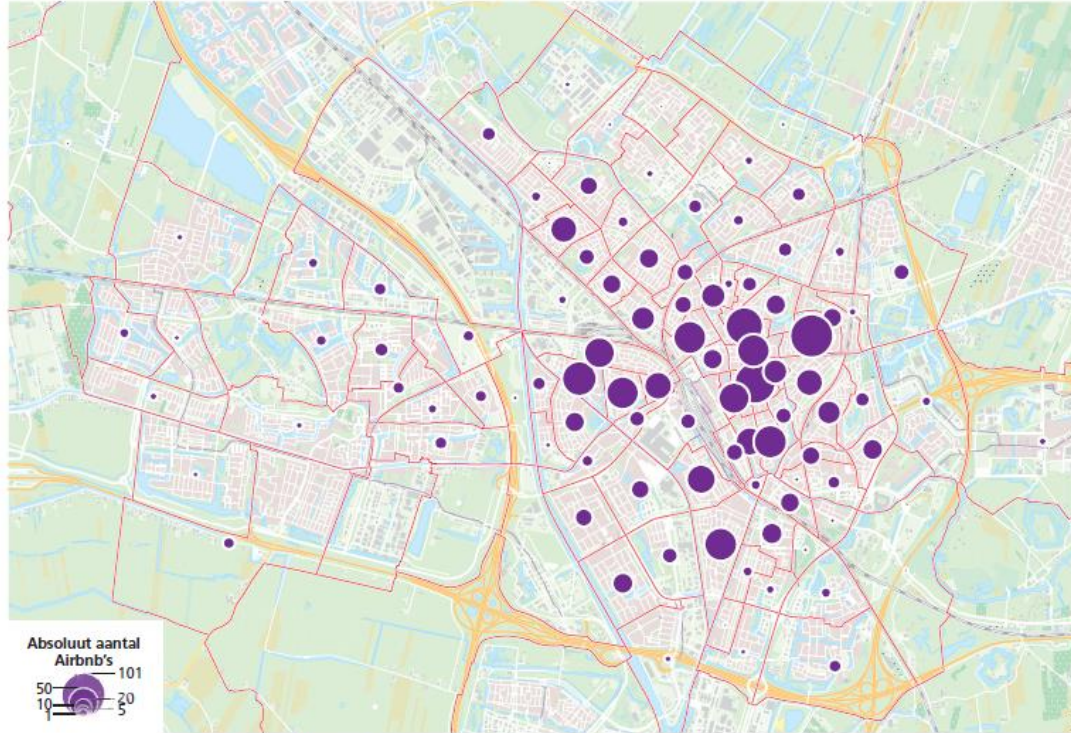
Purchase protection



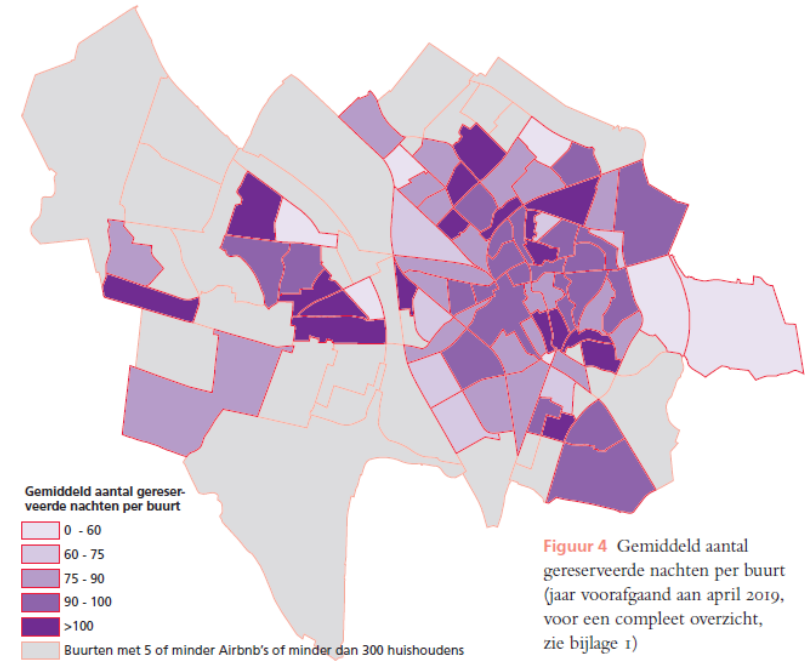
3 policy options;

- **Registration** obligation; and registration number in ads
- **Duty to report**: upfront notification of overnight stays
- **Licensing requirement**: for rental providers

Example city of Utrecht, registration alone: drop of offering: 2.000 > 800 acco's



Figuur 2 Absoluut aantal actieve Airbnb's per buurt in de gemeente Utrecht (jaar voorafgaand aan april 2019)



Figuur 4 Gemiddeld aantal gereserveerde nachten per buurt (jaar voorafgaand aan april 2019, voor een compleet overzicht, zie bijlage 1)



52%

Latest (surprising) insight;

- A little over half on offer (airbnb and VRBO) from Zeeland is housing on regular parcs, campings, hotels
- Platforms as sales funnels for existing offerings
- Less issues with community
- Probably a rural tourism specific development



First get a **factual picture** of real demand-supply **locally**, then policy

No **stand alone** acco policy; embed it into overall development strategy

Legislate before it's too late

A vibrant scene featuring four young women laughing and socializing. They are standing in front of a large, colorful mural with abstract shapes and patterns. The woman on the far left is wearing a white t-shirt and jeans, holding a glass of beer. The woman next to her is wearing a black top and a teal skirt, also holding a beer. The woman in the center is wearing a light blue denim shirt and sunglasses, holding a beer. The woman on the far right is wearing a denim jacket and has long, wavy hair. The overall atmosphere is joyful and social.

Bring yourself.
We'll do the same.

Thank you.

nbtcb.nl

tdegroot@holland.com