

Highlights Rivercruise study Amsterdam 2023



~ x cruise
~ x port
~ x amsterdam

Rivercruise study – Reason and goal

April-October 2023

- On 22 December 2022, the Amsterdam City Council approved the policy documents on nuisance, overtourism and tourist overnight stays. At the time, this included approval of the minimum package of measures/measures to be investigated to comply with the 'Tourism in Balance Amsterdam' regulation (hereinafter: the regulation) in the field of nuisance, overtourism and overnight stays. This regulation was adopted by the Board in June 2021.
- The regulation includes a range of 10 and 20 million tourist nights per year, with 12 and 18 million tourist nights per year as signal values. The visitor forecast 2022-2024 (O&S, May 2022) shows that in all scenarios, the signal value of 18 million will be exceeded in 2024, a value that signals that with continued growth, the maximum limit of 20 million tourist overnight stays is in sight.
- The policy documents include a package of measures to be investigated to reduce the number of tourist overnight stays and overtourism within the bandwidth and thus maintain the balance between hospitality and quality of life in the city. In the context of the regulation, the Executive Board outlines a vision in the Vision for the Visitor Economy in Amsterdam 2035 (hereinafter: the vision) with a focus on socially responsible and sustainable tourism. In addition, the Municipal Executive aims to limit the growth of tourism and transform the visitor economy into a sector that contributes to the entire city.
- In this report, one of the measures to be examined from the policy paper on overtourism; the impact of different scenarios of curtailment of the river cruise. This is part of a broader package of measures to curb overtourism in Amsterdam and to take a step towards the vision for the future. This includes drawing up scenarios for limiting the number of river cruises, tightening up the regional sea cruise policy, the implementation of the coach policy and lobbying on aviation tax and budget flights. .

Rivercruise study – research assignment

1. Insight into the rivercruise market:
 - Calls/ships: the number of calls made by river cruise vessels in the period 2017 to 2023 and type of calls/ships
 - Passengers: the number, type and origin of passengers, the tourist destinations of passengers (city and/or region) and river cruise-related hotel stays (number/type) in Amsterdam
 - Economic impact and contribution: the direct and indirect expenditure related to the river cruise and economic contribution in added value and employment.
 - Berths and facilities: the number, capacity and locations of berths and river cruise facilities

2. What are possible scenarios for curtailing river cruise shipping in Amsterdam, (-25%, -50%, -75%, -100%)?
 - What are the (social) effects of the different scenarios? Impact on direct and indirect expenditure and economic contribution to value added and employment.
 - Financial implications for Cruise Port Amsterdam (CPA), Port of Amsterdam (PoA) and the City of Amsterdam
 - Environmental effects
 - Potential for possible repurposing/redevelopment.

This study was conducted by Decisio on behalf of the municipality of Amsterdam and Port of Amsterdam in the period April to June 2023.

Rivercruise study – sources and method

- **Ships/calls at based on the Amsterdam reservation system**

The research is based on the (quantitative) data from Cruise Port Amsterdam on the number and type of calls of river cruise ships in Amsterdam. The source for this (at ACP) is the reservation system of completed and expected calls in 2023.

- **Key figures impact study river cruise market Amsterdam Decisio 2017**

The economic impact of the river cruise market in Amsterdam in 2023 is derived from various key figures from Decisio's 2017 impact study on the river cruise market in Amsterdam. At the time, Decisio/Strabo conducted extensive surveys among river cruise passengers and interviews were held (on the ship) with tour managers. At the time, a reliable and detailed picture was set up in terms of occupancy rates per (type of) ship, spending profiles per (type of) passengers, the number of hotel nights before or after the river cruise in Amsterdam and tourist destinations. After correction for inflation to the current price level in 2023, these key figures have been taken by Decisio as a starting point to outline the economic impact of river cruise shipping in Amsterdam in 2023.

- **Mitigating scenarios for river cruise shipping**

The impact of curtailing river cruise shipping in Amsterdam has been mapped out for several scenarios.

- **Conversations effects scenarios**

Finally, Decisio held several discussions with Destination Management Companies (DMCs; provide services to shipping companies), Cruise Port Amsterdam, Port of Amsterdam and the City of Amsterdam to support the most reliable estimate possible of the effects of various scenarios.

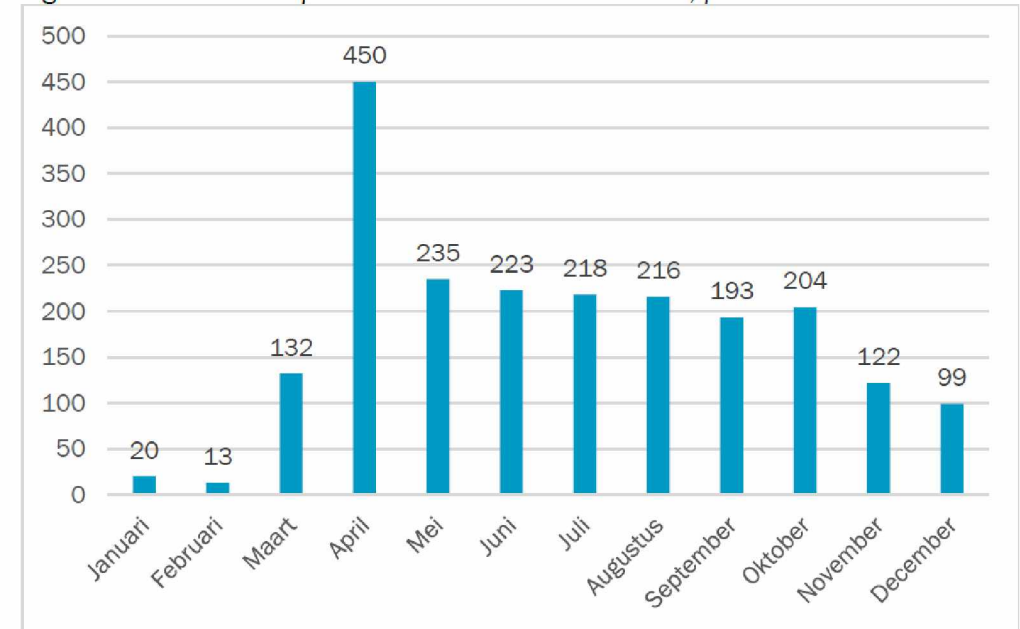
- **Method of calculating economic impact**

To map the economic impact of river cruise shipping in Amsterdam in 2023, the methodological steps of the Decision 2017 report have been taken.

Rivercruise study – calls over the year

- Spring peak: 450 river cruise ships in April 2023
- The month of April is the river cruise month par excellence. In April 2023, there were 450 river cruise ship calls in Amsterdam; more than 20 percent of the total number of calls on an annual basis. April is usually the busiest month of the river cruise season. This is mainly due to the flowering period (tulip fields, etc.) and the opening of the Keukenhof. Most shipping companies offer special tulip routes and the 'Dutch flower experiences' in the spring. After April 2023, we will see a period of 6 months (May to October) of an average of 200 river cruise ship calls per month.
- Amsterdam river cruise season: unchanged and comparable for several years
- The spread of the number of calls in Amsterdam in 2023 over the season is in line with how it was in previous years (with the exception of the Corona years 2020 and 2021, of course). In the years 2017 to 2019 and 2022, we see an identical seasonal pattern with April as the busiest month and then a stable number of 200 river cruise vessels per month through October.
- Nearly 60 percent of river cruise ships in Amsterdam are 'turn around'

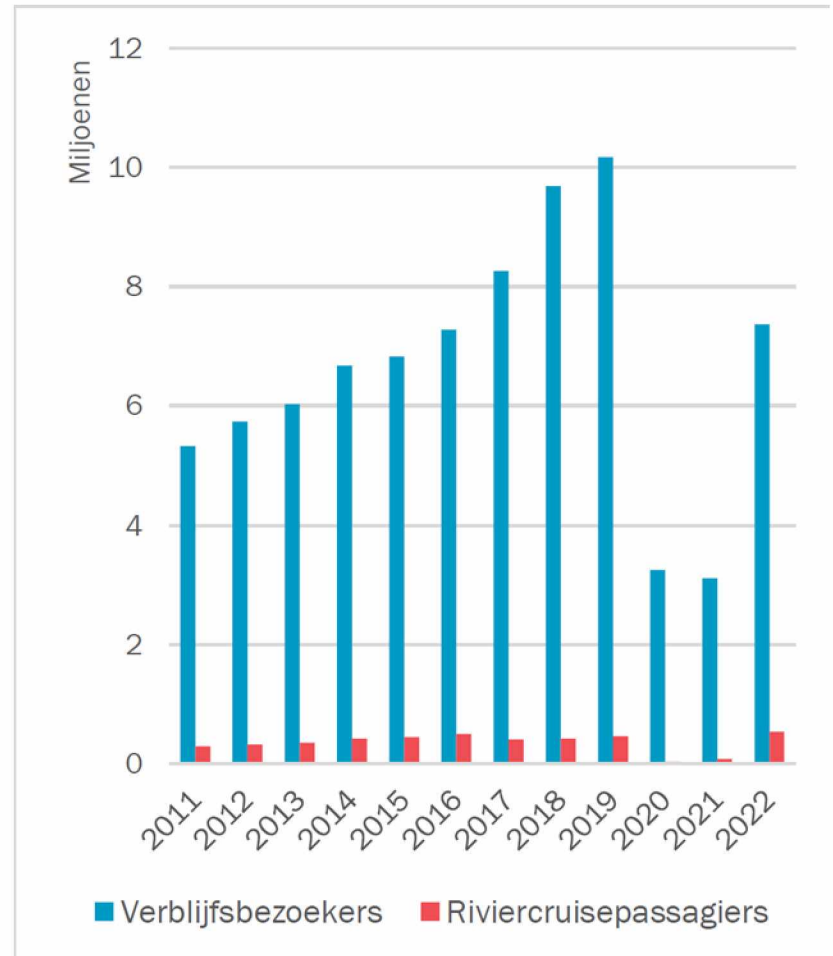
Figuur 2-2 Aantal aanlopen riviercruisevaart Amsterdam, per maand in 2023



Bron: Cruise Port Amsterdam, bewerking Decisio

Rivercruise study – passengers

- The share of river cruise passengers in the total number of overnight visits is relatively limited
- **More than 500 thousand river cruise passengers** in Amsterdam in 2023 . The number is based on reservations made for river cruise vessels (2,125) and on the occupancy rates per type of vessel based on the 2017 Decisio river cruise survey.
- Approximately **380 thousand are turnaround**; About 120 thousand transit passengers
- The majority (more than 75%) of turn-around passengers has an intercontinental origin. The other 120 thousand passengers have Amsterdam as transit destination. More than 80% of transit passengers has a European origin.
- In total, in 2023, this will involve approximately 365 thousand (hotel) overnight stays before or after the river cruise trip in Amsterdam. About half of the turn-around passengers stay at least one or more nights in Amsterdam before or after the river cruise trip (based on Decisio/Strabo 2017 research). These are mainly hotel stays in the 4+/5-star hotels in Amsterdam. The share of river cruise-related hotel stays in Amsterdam is **approximately 2 percent** of the total number of overnight stays

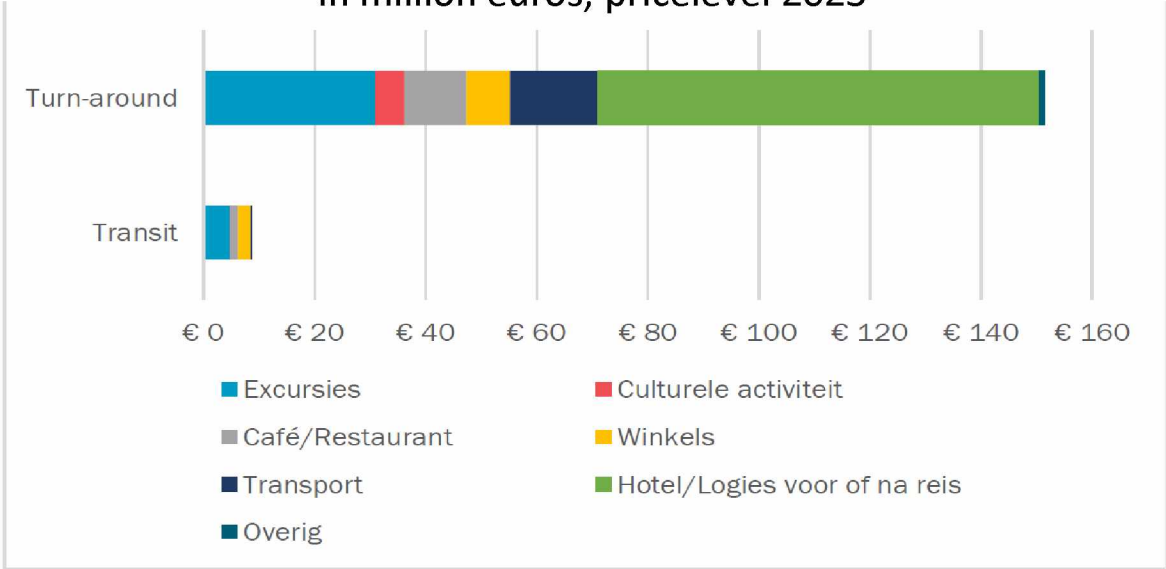


Rivercruise study – Economic value

Total economic contribution of Rivercruise:

- approx. 136 million euros in added value (116 million euros in Amsterdam)
- approx. 2,100 jobs (1,900 in Amsterdam)

Expenditures rivercruise passengers in Amsterdam in million euros, pricelevel 2023



Rivercruise study – Economic value

- Direct expenditure by shipping companies in Amsterdam: over 61 million euros, consisting of operational costs of the river cruise vessels and the expenditure of the crew.

Direct expenditures by shipping companies in Amsterdam in million euros, pricelevel 2023

