



2030 Perspective

Destination
the Netherlands

A new vision for destination the Netherlands
to benefit all Dutch people

Foreword

Tourists offer us a new perspective on our living environments. Things that we consider run-of-the-mill may be really special to them. In the past year, over 1.3 billion global travellers, including ourselves, admired a range of locations around the world. The UNWTO expects this number to increase to 1.8 billion by 2030. Global citizens want memorable experiences and adventures. This generates a lot of power. The kind of power we treasure and want to use to good advantage, also in the Netherlands.

The House of Representatives in the Netherlands debated this matter in early 2018. This debate was the genesis of the development of this Perspective 2030.

NBTC took up the challenge and developed this vision through an extensive process of co-creation with hundreds of stakeholders from the hospitality industry and other sectors. We thank everyone who contributed to this vision.

Perspective 2030 is about destination the Netherlands. It is about the transformative power of tourism and the contribution of this industry to the social challenges of our country. This vision takes into account the major differences between cities and regions. It transcends individual actors and involves related industries and policy areas. Direct and indirect stakeholders, NBTC included, may choose how they wish to contribute to the realisation of the perspective.

The social awareness regarding tourism is changing among travellers, residents, businesses and government bodies. The coming ten years will require a different view and approach compared to the previous ten years. The future needs new paradigms as a basis for new content and processes, new KPIs and changing roles.

This Perspective 2030 and the 1st Tourism Summit are the beginning of a tourism dialogue.

Together we need to take action on behalf of this country that we love to live, work and recreate in. A country that makes visitors feel welcome and in which entrepreneurs are successful. A country that benefits us all.

Co-creation to realise this vision is not a linear process and by no means a quick win. It requires effort and collaboration across geographical, sectoral and departmental borders. These sectors sometimes have conflicting interests.

It is well worth the effort to us all to use the transformative power generated by tourism. This is the reason we appeal to the government to support and prioritise the Dutch visitor economy, aka destination NL, and facilitate it accordingly.

Relevant responses to the presentation of the draft Perspective 2030 during the Tourism Summit on 10 October 2018 were added to this final version. From now on, we will work on developing both an action plan and a supporting ecosystem.

So far, there has been a lot of support and enthusiasm for the perspective and many parties want to collaborate in order to realise this vision. Scepticism is a natural part of these types of processes, but this is not the time to stay on the sidelines. Join us and support the further realisation of Perspective 2030.

Together, we stand strong for a liveable, loveable and valuable country.

Jos Vranken

Managing Director NBTC Holland Marketing

January 2019

Summary

/00

A new vision for destination the Netherlands to benefit all Dutch people

The opportunities and challenges of tourism

Tourism gives us a lot. It broadens our world and, by seeing it through the eyes of others, makes us proud of the Netherlands. Tourism is also beneficial in economic terms. So far, the Dutch government and the hospitality industry have mostly promoted the Netherlands in order to attract more visitors. We now know that more is not always better, definitely not everywhere.

From destination promotion to destination management

The number of domestic and incoming visitors in the Netherlands will break new records. Estimates forecast that the number of incoming visitors could grow by 50% from 18 million in 2017 to 29 million in 2030. This number of international visitors could go up to 42 million in 2030 if the growth enjoyed in the past few years keeps progressing exponentially (NBTC, 2018).

Pressure on the liveability of our cities and iconic locations will increase due to increasing visitor numbers, while other parts of the Netherlands do not or insufficiently benefit from the opportunities and socio-economic boost tourism can offer. If we want to manage the visitor flows and cash in on the opportunities that tourism offers, we have to act now. Instead of promoting the destination, it is time to start managing and developing it.

Tourism as a means to an end

This vision aims to develop the Netherlands into a future-proof, liveable, lovable and valuable destination.

We see tourism as a contributing factor to the solution of consequential social issues and challenges that impact our prosperity and welfare, in order that every Dutch citizen will benefit from tourism by 2030.

The most important themes are:

- Enhance the Dutch identity;
- Improve the liveability;
- Realise our sustainability objectives;
- Create employment opportunities.

Our focus is on shared interests and putting local residents first

The interests of all stakeholders, that is visitors, residents and businesses, were combined in these themes. To develop the Netherlands into a future-proof destination, we have to deploy activities that provide input to the shared interests of these groups. The interests of locals were previously marginalised in the development of tourism and, therefore, deserve prioritising now...

Our goal is for every Dutch person to benefit from tourism by 2030

Five strategic cornerstones

Tourism is a means to solving major social issues that contribute to the public interest and shared prosperity and welfare of the Netherlands.

To serve this interest and to develop a liveable, lovable and valuable destination, we formulated a number of strategic priorities that are most important during the development towards 2030.

1. Balance advantages and disadvantages

We have to actively improve the benefits of visits for all Dutch citizens and raise awareness for these benefits. It is also important to actively and visibly limit the disadvantages of increasing visits.

2. All areas of the Netherlands are appealing

We want to attract visitors to different parts of the Netherlands, and if possible, at different times of the year. It is, therefore, necessary to improve the current product offering and to develop new attractions in order to put unknown areas in the spotlight. By increasingly more spreading future visitors throughout the Netherlands, more regions and residents will benefit from our visitors.

3. Accessibility

We need an integrated approach to air, rail, road and water traffic. Visitors and residents benefit from sustainable mobility solutions that result in maximum accessibility, from the first to the last kilometre. Mobility that suits the needs and behaviour of both visitors and residents.

4. Sustainability is a must

Because of our climate targets and in order to guarantee a dynamic living environment for all Dutch people, the visitor economy has the responsibility to be more sustainable, to circularly handle raw materials, to prevent pollution and waste and to minimise CO2 emissions.

5. A hospitable industry

Hospitality is an important aspect of attractive destinations. We will have to invest in the image, the professionalism and the attractiveness of the industry to realise an optimal hospitality experience. Industry employers will have to develop new ways of educating and engaging with new employees and will have to offer good career perspectives.

Three conditions for success

A. Tourism as a policy priority

Tourism should be a policy priority. We need a cross-sectoral tourism pact, meaning that all players in the visitor economy will have to take action in order to broaden the perspective. There is also an explicit role for governments. The complexity and magnitude of the challenges require policy areas to interrelate. Many parties recognise the necessity and the added value of independent, national coordination and perseverance.

B. Joint action and investment agenda

We need to invest in area development, innovation, partnerships and policies. This requires public-private investments linked to specific projects. It also requires a national action and investment agenda that the national government, the provinces, entrepreneurs and marketing organisations will carry out together and support across the board.

C. National Data Alliance

There is a need for up-to-date, complete and new data. We need to develop an independent data alliance for tourism. We can use this database to share existing data and knowledge, both on a regional and a national level. We can collect missing data by way of additional research.

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Context

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New ways of travelling

We live in a world in which change is the only constant. Borders are blurring; everything is connected. This is influenced by many different factors. We will highlight the factors that specifically impact the visitor economy.

A changing world

The world population continues to grow. Emerging travel markets have a growing middle class that is able to travel more often and for longer periods of time, partly due to lower prices. The number of international travellers around the world has been growing steadily by 4% each year. In 2017, tourism reached a peak of +7% of incoming travellers. Europe as a destination reached a record growth of no less than 8% (UNWTO, June 2018).

From ownership to use

We live in a time in which we are connected with everything and everyone through online communities. People are starting to realise that making use of things is more important than ownership. The so-called sharing economy really took off in the past few years. We share our car, lend out our tools and turn our kitchen into a takeaway restaurant. The most well-known example of the growing peer-to-peer economy is renting out our houses to holidaymakers.

Geopolitical developments

Global powers are shifting, people feel increasingly more unsafe due to terrorism and we face increased risks of natural disasters. It is hard to predict how these insecurities will influence international travel. It is clear, however that safety plays a part in choosing a destination.

Digitisation and technology

Technological developments offer endless possibilities. Consumers use digital resources and platforms for inspiration and information. Online mediums make it easier and faster to book a trip. There is great transparency when it comes to prices and products. Big data offers us new insights so that we can carefully analyse and, if necessary, influence booking and travel behaviour. Big data also makes it easier to predict the future. Virtual reality gives us new ways to go to places and to enjoy splendid experiences.

Tourism makes everyone aware of the fact that we are a part of a much bigger world.

- Pieter Elbers, KLM

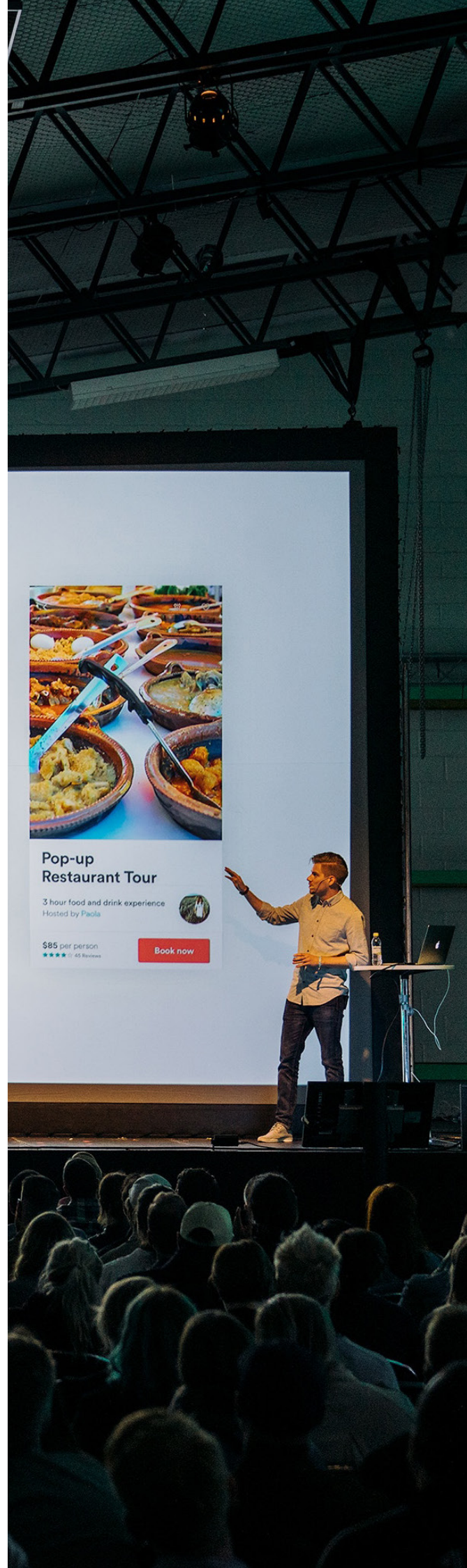
New influencers

We still want to see famous icons but also want our own unique experiences. In creating these experiences, we look for authenticity and transparency. When it comes to asking for advice on out-of-the-ordinary locations, we no longer put our trust in businesses. We ask our neighbours and fellow travellers. Influencers are new sources of information, and we find each other in communities in which we share and create our passions and experiences with each other.

Changing travel requirements

Some visitors will still be interested in seeing some of the so-called highlights in the future. At the same time, a growing number of global travellers is looking for authentic travel experiences. This trend continues towards a transformative economy in which people travel for personal growth and development.

The visitor economy comprises both short and long-term visits by domestic and international visitors for business travel, leisure travel and other purposes.



Opportunities

/02



Tourism has a positive effect

Tourism offers us a lot. It broadens our world and, by seeing the Netherlands through someone else's eyes, makes us proud of our country.

Tourism is also very worthwhile in economic terms. Tourism makes up 10% of the world's economy, yields \$1.1 billion in revenues from export, while one in ten jobs is in tourism. Worldwide, tourism ranks third on the list of main export products, after chemicals and fuel (UNWTO, August 2018).

The expenditure in the Dutch tourism industry was €82 billion in 2017. This sector's additional value of €28.3 billion made up 4.3% of the total gross domestic product. In 2017, this sector provided 761,000 jobs (CBS, 2018).

Managing flows is essential. It goes without saying that it is great that the Netherlands is so successful, however, we do not want to be the next Venice or Barcelona.

- Diana van Roest, Google

Tourism is not a stand-alone industry, but impacts many other sectors, such as education, culture, retail, infrastructure and mobility. The worth and impact of tourism will increase as we near 2030.

There is a lot of interest in visitors from emerging travel markets, but the Europeans, including ourselves, account for the largest share of this market (UNWTO, 51%). This also makes us responsible for the impact our travel behaviour has on our society.

It is going to be busy in 2030...

During the last ten years, the number of inbound visitors to the Netherlands increased by an average of 5% per year. During this same period, domestic travel also increased, by an average of 2% per year.

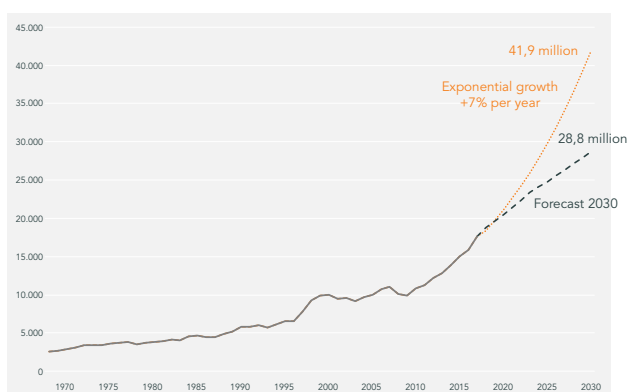
The population of the Netherlands is increasing, and many Dutch people choose the Netherlands as their destination for a third or even a fourth holiday. This results in an increasingly more intensive use of public spaces and infrastructure. We see this same development in other parts of the world.

International visitors

Based on a scenario analysis, NBTC forecasts that the number of incoming overnight visitors will **grow by a minimum of 50%** from 18 million in 2017 to **29 million in 2030**. If the growth in the previous years continues to increase exponentially, this number may go up to no fewer than 42 million in 2030 (NBTC, 2018).

Despite the strong percentage growth in the number of Asian visitors, the ratios between the various countries of origin are relatively stable. The prognosis for 2030 is that most visitors will be from Europe (22.7 million), with Germany (10.4 million), Belgium (3.3 million) and the United Kingdom (3.2 million) at the top of the list.

Forecast inbound tourism 2030



Top 10 countries of origin inbound tourism the Netherlands 2017 and 2030

Number of visitors x 1.000	2017	Number of visitors x 1.000	2030
Germany	5.245	Germany	10.355
Great Britain	2.230	Belgium	3.335
Belgium	2.225	Great Britain	3.240
US	1.415	US	2.055
France	840	France	1.085
Italy	560	Italy	735
Spain	465	China	665
China	365	Spain	630
Switzerland	295	Switzerland	510
Ireland	220	Ireland	315

Source: Prognosis NBTC, 2018, numbers rounded up to 5,000

Domestic visits

It is expected that the number of guests in the domestic market for holidays and extended business trips will grow in a little over ten years by no less than 27% from 24.3 million in 2017 to 30.9 million by 2030 (NBTC, 2018). To this number, we can add at least 1.5 billion day-trips that the Dutch undertake in their own country (NBTC-NIPO Research, 2015).

Our country is ideal for short stays. The Dutch like to stay in their own country for a weekend or midweek break. International tourists who fly to the Netherlands prefer city trips. Guests from our neighbouring countries enjoy going to the coast.

The Netherlands is also a popular destination for business meetings and congresses, thanks to the excellent international accessibility, stable political environment and open business environment. The Randstad area, mainly Amsterdam, welcomes the largest number of convention guests, followed by several university cities in other parts of our country (ICCA, 2018).

Opportunities and urgency

The expected growth offers opportunities. There are a lot of areas in the Netherlands that do not benefit sufficiently from the economic boost tourism offers. On the other hand, some areas are so busy it is becoming bothersome for the residents. There is an urgent need to view visits from a different perspective.

Many areas of our country have ample capacity to receive visitors. The problem is that potential visitors do not know how to find these destinations. In some places in the Netherlands, the liveability is under pressure due to a steep decline in population. In these areas, tourism can help to create an attractive climate in which to live, work and play. Other sectors will benefit from this as well.

This vision document is not limited to the current challenges that metropolitan areas face, but explicitly addresses the opportunities for **every part of the Netherlands**.

We have to pro-actively develop a strategy that will make tourists contribute to the goals we consider important. This can be the economy, but it can also be the liveability, ecology or identity of an area.

- Ewout Versloot, Rotterdam Partners

Liveability under pressure

It is no news that some of the areas in our country are more favoured by visitors than other areas. Amsterdam is at the top of the list with **17.5 million visitors**, of which 42% are domestic and 48% are international visitors (Amsterdam Marketing, 2016).

If the forecast growth does materialise, it will be even busier at tourist hot spots by 2030. This not only applies to Amsterdam but to other areas in the Netherlands as well. If we do not take pre-emptive action, the **liveability** in cities and iconic locations will suffer due to **visitor overload**. Coastal areas will also get busier, especially during peak season.

An additional effect is that the many visitors in these areas may become a nuisance to the locals. This will put pressure on the liveability for residents, which will reduce public support for tourism. If we do not act now, we will miss out on the opportunities offered and we will compromise both the quality of life and hospitality in the busy areas. We cannot just sit back and not do anything.

Vision

/03



From promotion to management

So far, the Dutch government and the tourism industry have been promoting the Netherlands as a holiday destination to attract more visitors. We can now state that more is not always better, definitely not everywhere.

We have to take action **immediately** if we want to manage visitor flows. Instead of promoting the destination, the time has come to **manage the destination**.

The first step is to **make choices**:

- **What do we want to use tourism for?**
- **What do we want the Netherlands to be as a destination and for whom?**

Tourism is not a natural phenomenon that suddenly comes rushing your way. You can direct and manage it. People are acting as if it is unstoppable and that you cannot change it.

- Esther Agricola, Municipality of Amsterdam

From a goal to a means

Tourism has always been a goal in itself and the most important driver was the economic added value it offered. Businesses in the visitor economy benefit from tourism while, in some areas, the residents pay the price. They gain hardly anything or are not aware of any benefits.

Other areas, such as nature and heritage sites, attract scores of visitors but do not generate any direct income.

This has to change.

The objective of this vision is to develop the Netherlands into a future-proof destination with visits contributing to the prosperity and welfare of all Dutch citizens.

Tourism as a means for prosperity and welfare

Tourism is a **way** to explicitly contribute to solutions for consequential social issues that serve the public interest, i.e. prosperity and welfare, in the Netherlands.

The most important themes a visitor economy can contribute to are:

- Enhance the **Dutch identity and pride**
- Improve the **liveability**
- Realise our **sustainability objectives**
- Create **employment opportunities**

Enhance the Dutch identity and pride

Tourism stimulates us to tell visitors stories about our roots and about who we are. We actively project our values and show what we believe in. This contact enhances our pride, our image and our identity. This is beneficial for our economy, the business climate and trade relations.

It also contributes to attracting human capital. Encounters can also be conducive to mutual respect and peaceful coexistence.

Improve liveability

The population, economic activities and facilities in some areas of the Netherlands are decreasing. Tourism can be an important socio-economic boost to the development and liveability of these areas. It can prompt investments in better infrastructure, a varied range of retail businesses and other facilities that will also benefit the residents. Becoming aware of the attractiveness to visitors may inspire others to go and work and live in such an area and, thereby, contribute to the regional vitality.

Quality tourism positively impacts the business climate in the Netherlands.

- Gert-Jan Hospers, University of Twente

Realise our sustainability objectives

The Netherlands has ambitious objectives regarding sustainability and there is a growing interest in circularity. Activities related to this are mostly based on renewable energy sources, and finite sources are used and re-used as effectively as possible.

In its coalition agreement, the current government specified a 49% decrease in CO2 emissions in 2030, compared with 2017. Though not explicitly mentioned in the agreement, the visitor economy can structurally contribute to this goal by prioritising the making of transport, accommodation and entertainment more sustainable. This is not so much a responsibility as an opportunity.

Create employment opportunities

In 2017, the tourism sector provided 761,000 jobs. This means that over one in thirteen jobs in the Netherlands was in this industry (CBS, 2018). Tourism is one of the biggest employers in our country.

A strong and growing industry will create more and relevant jobs for various target groups in areas in which this is greatly required.

I strongly believe that we should use tourism as a means for the public interest. It is a very important industry as it creates many jobs and is a driver for hustle and bustle.

- Ronald Besemer, Utrecht Marketing



The importance of shared interests

The interests of the various stakeholders, i.e. visitors, residents and businesses, are combined in all four themes.

Visitors want an enjoyable experience and will look for a product offering that fits in with their interests. Businesses want to grow and benefit from the growing number of visitors. Residents will reap the benefits of an attractive, dynamic and safe living environment with plenty of job opportunities. These are obviously not separate worlds. A resident may also be a visitor or own a company. However, the stakeholders' interests sometimes clash. It is up to the authorities to chart the most beneficial course.

The profits generated by tourism go to hotels, restaurants and souvenir shops and not to the Dutch people.

- Tracy Metz, journalist Urban Issues

Public interest is shared interest

To develop the Netherlands into a future-proof destination, we **have to** do what is required to contribute to the **shared interests** of all stakeholders.

Our goal is for every Dutch citizen to benefit from tourism by 2030

The shared interests of visitors, businesses and residents



The most important challenge is to ensure that residents also benefit from tourism.

- Yuri van Geest, Singularity University

Prioritise interests of residents

The Dutch are what makes the Netherlands. They are the most important ambassadors of the country in which they live. Securing support for tourism from local people is crucial. There is little support in areas of tourism overload because of the issues that residents experience. In other areas it is not clear at all how tourism can contribute to the shared interest. In general, we can state that the Dutch do not benefit enough from tourism.

The **interests of residents were often marginalised** in the development of tourism. They deserve to be a **priority** now.

It is important that residents are actively included in tourism activities. We have to always consider whether residents benefit from tourism. Are we listening to them? Are they involved?

- Joanna Bunker, Airbnb

Residents first

To put residents first, we identified the following key elements.

Acknowledge the impact

Residents want and have to be acknowledged when it comes to the impact that future tourism will have on them and their living environment. Data can help us identify the positive and negative impact. It is key to keep up an open dialogue with residents.

Co-create tourism policy and activities

On every level and in every area of the Netherlands, residents should be included as co-owners of local tourism policies, in addition to government bodies and businesses. They must be integrated in related activities in order that shared interests are at the forefront of everyone's mind. This should result in concrete and tangible interventions and solutions that increase the benefits and prevent or lighten the burdens of tourism.

Every municipality should involve residents in the decision-making process surrounding tourism through co-creation.

- Evert van Dijk, 't Gieters Belang

What do we want to be and for whom?

We want to be a liveable, lovable and valuable destination that welcomes visitors who contribute to our objectives.

Our strengths

Our country boasts great **strengths**; who we are as a society and what we have to offer. The Netherlands is a wonderful tourist destination.

The strengths of the Netherlands can be summed up as follows:

- The country offers a **broad and varied product offering** for both **leisure and business** visitors.
- The product offering is **close together geographically**.
- There is a huge variety of unique **local identities**.
- The Dutch are **open-minded people**: welcoming, colourful, inventive and enterprising.
- **New Dutch**: we are proponents of creativity,

The Netherlands is a cliché destination that focuses on the highlights. Our opportunities lie outside of those well-known attractions and in what the provinces offer.

- Peter Vandermeersch, NRC Handelsblad

innovation and design.

These strengths will help us to use our inventiveness and entrepreneurship to further develop and innovate the Netherlands as a destination.

Integral design destination the Netherlands

The aim is to work together with regions and cities to create a design sketch of destination the Netherlands in which districts are defined with their own unique characteristics that **complement** one another in order to attract visitors who are interested in what their district offers.

Municipalities, provinces and other public-private partners must work together closely and disregard some of their own interests in favour of the public interest; they must look beyond their own

It is simply astonishing that two provinces compete against each other while trying to offer the exact same experience!

- Rutger van Zuidam, Dutch Chain

provincial or municipal borders.

Quality tourist

In order to amalgamate tourism with the everyday society as optimally as possible, to optimise the benefits for Dutch people and the economy and to minimise overload trouble, we aim to **attract visitors who will contribute to the Netherlands as a future-proof destination**. These visitors will add value and will not cause trouble.

We call them quality tourists. The exact profile of these visitors differs per area and has to be

On a national level, it is not about over-tourism but about selecting the quality tourists you want to welcome as they suit your profile and objectives as a city, region or province.

- Peter Kentie, Eindhoven 365

defined on a local level.

Develop and discourage

We have to develop a relevant product offering for this quality tourist. Moreover, we must be prepared to **stop actively attracting groups of visitors** who are a nuisance or do not add sufficient value. This may be achieved by limiting the accommodation and entertainment products aimed at these groups or, if necessary, stop offering these altogether. Municipal policies influence this greatly.



5

Strategic cornerstones

/04



Tourism is not a goal in itself, but a powerful tool to contribute to solutions for issues in society that serve the public and shared interests, i.e. prosperity and welfare, in the Netherlands.

To develop a liveable, lovable and valuable destination, we formulated five strategic priorities on which we will focus during the development towards 2030.

1 Balance of advantages and disadvantages

We have to purposefully enhance the benefits of visits for all Dutch people and create awareness for these efforts. Purposefully and visibly reducing the disadvantages of these visits to an acceptable minimum will be a priority.

2 The whole of the Netherlands is appealing

We want to attract visitors to other areas of the Netherlands during different times of the year, if possible. To this end, we will have to improve current attractions, develop new products and train the spotlight on lesser-known areas. By spreading future visitors throughout the country, more regions and residents will benefit from their visits.

3 Accessibility

An integral approach of air, rail, road and water traffic is required. Residents and visitors will benefit from sustainable mobility solutions that result in optimal accessibility from the first to the last kilometre of the journey. This requires mobility that suits the needs and behaviour of both visitors and residents.

4 Sustainability is a must

If we wish to achieve the specified climate targets and guarantee a healthy living environment for all Dutch people, the visitor economy has the responsibility to be more sustainable, to make circular use of raw materials, prevent pollution and waste and minimise CO₂ emissions.

5 A hospitable sector

Hospitality is fundamental to an attractive destination. We have to invest in the image, professionalism and attractiveness of the industry as an employer if we want to be as hospitable as possible. This can be achieved with new ways of education and development, appealing to new employees and offering attractive prospects.

1 Balance of advantages and disadvantages



The benefits and burdens of tourism are not balanced in a still limited, but growing, number of areas.

The city centre of Amsterdam is one of the most often debated examples. The Netherlands has a growing number of visitors, and there will soon be more over-tourism. Every area requires specific measures to minimise this. As mentioned before, the **interests of residents are often marginalised** while it is mainly **businesses that benefit** from the enormous numbers of visitors. The same applies to cultural and nature organisations; they pay for development and maintenance while the restaurant around the corner benefits. This results in tension.

The benefits of tourism have to be spread out more. Country estates attract people, but other facilities profit from their expenditure.

- Berno Strootman, College van Rijksadviseurs

We must purposefully **enhance the benefits** of visits for all Dutch people.

In addition, we must ensure that the **disadvantages** of visits are reduced to an **acceptable level**.

1. Define the benefits and burdens

The international visitors are not solely responsible for over-tourism. The Dutch population is growing, as is the number of expats and foreign students. Urbanisation and changing travel behaviour of the Dutch also cause increased busyness. It is important that we balance people's perceptions.

It is essential to define the advantages and disadvantages, who experience them and who cause them and that we do this for every region. This will require constant monitoring and relevant data.

2. He who benefits pays

The parties that benefit from a visit must also take responsibility for increasing the advantages and preventing or limiting the disadvantages for that area.

The way in which this will be done will differ per location. Usually, businesses benefit from visitors. After dialogue with the stakeholders, they will have to show how they will fulfil their responsibility to create demonstrable value for these stakeholders in the area in which they are located.

3. Targeted taxes

One way to increase the benefits of tourism for all Dutch people is to use fiscal proceeds, such as tourist tax, not only for the tourism industry but also for the benefit of residents.

This will have to be a completely **transparent** process. Residents need **insight, a voice** and **responsibility** when it comes to the local and regional expenditure of these proceeds to further their welfare.

4. Active discouragement

If certain groups cause trouble in a specific area and enforcement has insufficient effect, alternative measures will have to be taken. If all else fails, the attractions they are visiting may have to be closed down.

2 All areas of the Netherlands are appealing



Several areas of the Netherlands are overcrowded with tourists while a visit to other areas can contribute to a dynamic living environment.

The future growth of tourism is a positive development if it benefits everyone. NBTC prognoses show that coastal areas can expect double the number of international visitors by 2030 if we do not do anything. The growth in the rest of the country is relatively lower (NBTC, 2018).

Spreading visitors around the Netherlands in time and area is an **important measure**.

Fundamentally, distributing tourism throughout the country is 'against human nature'. People visit a country for a specific reason and are not easily persuaded to go and visit other places as well or instead. However, it is possible to **attract other visitors to other areas and at different times, provided there is an attractive alternative**. This is in line with the existing HollandCity strategy.

What will be our new Kinderdijk? The Netherlands needs new icons to be tomorrow's heritage.

- Daan Roosegaarde, Studio Roosegaarde

Developing new product offering requires sound coordination on a local and regional level. Destination Marketing Organisations (DMOs) are the hub of economic development in cities and regions. They can use their knowledge of the tourism market to play a coordinating role.

1. Integral area development

We need a national integrated design for destination the Netherlands that will answer the question of what products should be offered where? It is very important that these products are complementary, which requires careful coordination. Area development can only be successful if public and private parties are combined and shared interest is paramount. An example is the case in which a new national design museum will be awarded. Interested areas should not compete against each other. The most logical area should be awarded the museum.

Domestic and international visitors per region

Number of visitors x 1.000	2017	2030	Growth %
Coast (TG)	6.475	10.080	56%
Amsterdam (GM)	8.260	11.900	44%
Other areas of the Randstad (TG)	7.620	10.015	31%
Other areas of the Netherlands (TG)	19.880	27.615	39%
Total	42.235	59.605	41%

Source: Prognose NBTC, 2018, numbers were rounded up to 5,000

2. Develop products with own identity

Integral area development starts with a long-term vision on capacity and the desired quality visitor.

What target groups are open to alternative destinations and what are their needs?

To create an integrated design of the Netherlands as a destination, it is essential for regions to invest in:

- A **unique, personal identity and character**;
- An overview of **existing product offering**;
- Selection of the **kind of visitor** that fits in with this, both in numbers and profiles;
- **Develop** transport, accommodation and entertainment **products**, through optimisation and innovation, that suit the regions' identities.

3. Optimise existing and develop new products

The industry has insufficient innovative power in many areas. In many regions, the transport, accommodation and entertainment offerings are insufficient, outdated or not pertinent to the wishes of visitors.

Investment is required to optimise the existing product offering in order to improve this. This is possible by improving the current offering in **accordance with demand**, i.e. make it more relevant and easier accessible for the intended target audiences.

In addition, new products can be developed in new places in order to attract visitors.

4. Attract different visitors to different areas at different times

We have to focus on attracting **different visitors** to **different places**, preferably at **different times**, outside of peak season. At the same time, repeat visitors have to be seduced to go and see other destinations.

This can be realised by:

- Defining the **distinctive features and DNA** of the regions;
- Offering **attractive transport, accommodation and entertainment** options, including the development of a national event calendar;
- **Upgrading accessibility**;
- **Enhancing awareness** of relatively unknown, off-the-beaten-track spots.

We take people from Amsterdam elsewhere. But what we really want is for people to not even go to Amsterdam, but visit other tourist attractions in the Netherlands.

- Henk Philip, Tours & Tickets



3 Accessibility

Optimal accessibility and mobility are key for the Netherlands to be a future-proof destination.

Our capacity for mobility has reached its limits, while many rural areas have poor accessibility, especially when it comes to public transport for those last few kilometres. This problem applies to every part of the Netherlands. The growing number of domestic and international visits puts additional pressure on the mobility and accessibility of the Netherlands and destinations within our country, not only for visitors, but definitely for residents.

44% of all international visitors arrive by plane and 40% by car (NBTC, 2015). The increase in the number of low-cost connections between European cities resulted in significant growth in connectivity in the past few years and was an incentive for more international visits to our country. Visitors from the Netherlands and neighbouring countries mainly travel by car.

In the next few years, the number of travelled car and train kilometres will increase significantly. Passenger transport by train is expected to increase from 26% to 32% by 2030 (source: Ministry of Infrastructure and Water Management). The Dutch Council for the Environment and Infrastructure expects a significant increase of 38% in traffic jams by 2021, both on main roads and within city limits.



The number of cyclists is also growing. E-bikes are increasingly more popular in the Netherlands and in our neighbouring countries. This also has consequences for our infrastructure and mobility capacity.

We need an integrated vision and collaboration between all public transport businesses for optimum mobility.

- Chris Verstegen, Prorail

1. Integral approach and central management

We need an **integral approach of sustainable mobility solutions** for air, rail, road and water traffic which takes into account the needs and behaviour of all users.

Central management and incentives for the collaboration between various stakeholders, such as the government, mobility providers, residents and businesses, are required. This will help us work towards an integrated mobility plan, transcending regions and transport services. Transport for London is a great example.

The visitor economy and existing mobility alliances, visions and action plans have to be connected.

2. Invest in seamless journey

Optimal accessibility means an infrastructure that, in combination with modalities, has **enough capacity** to facilitate all travel movements, both by domestic and international travellers. This system must be **smart and connective** to the last kilometre of the journey. A system that makes it

easy for **visitors and residents** to use a range of types of transport. Digital linking of all transport options and payment systems is required. This will help us to create not only a physical but also a seamless digital journey from booking the trip to the journey itself.

3. Manage by dynamic pricing

A dynamic and differentiated pricing policy based on real-time data is one way to motivate residents and visitors to travel outside of peak times and to use more sustainable means of transport.

We are of the opinion that shorter distances should be travelled by train because it is more sustainable. This means the train has to have more competitive prices and travel times compared to planes.

- Maaïke van der Windt, Amsterdam Airport Schiphol

4. Prioritise sustainable transport

We have to do everything we can to make both domestic and international transport as sustainable as possible. This shows what we believe in, and it contributes to the Dutch experience.

- Do our utmost to make sustainable travel to the Netherlands possible.
- Improve services and accessibility, such as ease of use, both digitally and at stations, of sustainable transport, such as public transport

bikes and electric alternatives to bike/car/boat. Reward the use of these services.

- Develop innovative, sustainable modes of road and waterway transport.
- Tax non-sustainable forms of transport and use the proceeds to strengthen and accelerate the development of sustainable transport solutions and infrastructure.

5. Bikes are number one!

The Netherlands is known as a country where everyone rides bikes. The arrival of the electric bike has changed our cycling culture. We need an integral bike plan with a principal structure, regional structure and local structure. This means that both inner-city and regional infrastructures will have to change. Innovative solutions and attractive cycle propositions, such as the public transport bike, emphasise the frontrunner position the Netherlands holds in cycling mobility.

6. Make public transport accessible

Encouraging the use of public transport is an important way to contribute to liveability and sustainability. This applies to both incoming and domestic travel movements. When it comes to booking, paying and travelling, our public transport is not accessible enough to international visitors.

Cornerstones are:

- High-speed trains to replace, and in addition to, air traffic;
- Better connections between various means of transport;
- Use of new technological opportunities for easy, mobile payment;
- Smart transport solutions for the last few kilometres;
- Optimisation of signage and wayfinding.

7. Selectivity policy in aviation

To make our country easily accessible, it is important that Amsterdam Airport Schiphol has a powerful competitive position. This interest transcends tourism. It requires a clear selectivity policy. Limited space for growth can be used more effectively by increasing and speeding up the European train transport options. This keys into the fact that 80% of our international visitors are from Europe.

4 Sustainability is a must



In 2018, tourism was responsible for about 8% of the carbon footprint. Air traffic plays a huge part in this, as do cruises.

A doubling in the number of international visitors by 2030 will result in a **bigger impact on the environment**. The amount of greenhouse gas emissions in the Dutch tourism sector increased by 11% from 2010 to 2015 (CBS, 2017). If holiday emissions of Dutch people continue to increase, they will be higher than was agreed for the Netherlands as a whole in the proposed climate legislation by 2030 (CSTT, 2018).

The growing number of visitors will not only result in more emissions, but it will also increase consumption, possible food waste and more pollution through litter and waste. Moreover, over-crowded destinations will have a detrimental effect on nature.

People should be more aware that a holiday in your own country is an attractive and sustainable alternative.

- Thomas Heerkens, Landal Greenparks

When it comes to respecting climate objectives and guaranteeing an attractive, healthy and **dynamic living environment** for all Dutch citizens, this industry has a **responsibility** to **minimise emissions and pollution**.

1. Create awareness of own behaviour

In order to set change in motion, businesses, residents and visitors will first of all need to be made aware of the relationship they have with their environment. How does our behaviour impact the landscape and the environment and what do we give in return? Being more conscious of the consequences of our behaviour can be an incentive to making different, more sustainable choices.

2. Reward sustainable initiatives and tax polluting activities

To speed up further sustainability in hospitality, every development of new and existing services must be based on more sustainable solutions. This should be encouraged by rewarding sustainable initiatives, financially or otherwise. Polluting activities should be taxed more on a European level to encourage sustainability targets to be reached. Dedicated tax may help to strengthen and speed up new sustainable initiatives.

3. Invest in electric mobility

Mobility is the largest polluter in the transport, accommodation and entertainment group. Investments in making mobility more sustainable are, therefore, essential to make destination the Netherlands more sustainable. There are many initiatives in the aviation industry. These are mostly long-term projects that will not have a sustainable impact until later.

Over half of all international visitors in the Netherlands uses a car and public transport (NBTC, Inbound Tourism Survey 2015). This makes it possible to take quicker action regarding sustainability. By further developing the range of electric mobility and making bikes and electric bikes more easily accessible for visitors, we can contribute hugely to making travel within the country more sustainable.

4. Better accessibility by train

Encourage sustainable mobility by improving the accessibility of the Netherlands by train. This requires investing in new, faster and more frequent connections between the Netherlands and all countries in a circle of approximately 500 kilometres around us. Combine this with realistic prices for flying and the train will become a more attractive alternative to the plane. This will make a substantial contribution to the reduction of CO₂ emissions and towards achieving climate objectives.

We need universal regulations for sustainable stays.

- Marije van der Valk, Van der Valk hotel Nijmegen

5. Use established guidelines

There are also opportunities for better sustainability in the accommodation and entertainment industries. When developing or renovating accommodations, bars, restaurants and leisure facilities, we should enforce established guidelines, such as BREEAM and WELL, to realise sustainability.

5 A hospitable sector

Hospitality is an important part of an attractive destination and contributes to a pleasant living environment. An optimal hospitality experience is the result of the right combination of good quality products, service concepts and personal touch.

The Dutch are not service-oriented by nature. We have not provided top service for many years. If we aim to attract more quality tourism, we will have to increase our service levels. Otherwise, we will not attract these tourists.

- Steven Klooster, Travelbird



I dream that Dutch hospitality will once be an export product.

- Sander Allegro, Allegro INN-ovations

1. Proud of Dutch Hospitality

Dutch Hospitality is driven by our unique values and sociability. *Dutch Hospitality* is equal, open, personal and direct. This sets us apart from other destinations.

The sector needs new pride. Hospitality is an art and should be seen as such. The level of hospitality has to be monitored constantly, for example by using a so-called *Net Promotor Score* (NPS). In addition to improving the image of the industry as a meaningful employer, the employment conditions must be improved, and there needs to be more potential for growth.

If qualified employees move on to other industries, this will help improve the service in fields such as health care.

2. Use innovative power

There are a lot of opportunities to use our innovative power for the development of new service concepts and digital tools that improve the hospitality experience, from checking in and booking to paying for a stay, by mobile phone or otherwise. This will result in a strong combination of *high touch, high tech service*.

3. Lifelong learning

We are hospitable by nature. Using hospitality in practice is something that can be taught. There is a need for a national and integral approach for a lifetime of learning programmes, from secondary vocational education to re-entry level. The primary focus here is on practical work. Educational institutes, businesses and governments will have to work closely together to achieve this.

We also need competitive employment conditions in order that employees may be offered sustainable careers.

4. Work towards diversity and inclusiveness

It is our ambition that the visitor economy will employ many different groups in our society, and that its employees are a mirror of our society by 2030. We can tap into new target groups as potential employees. Employers in this industry play a key role. The government can make it easier for entrepreneurs to hire people with a distance to the labour market by offering subsidies.

We believe that the hospitality industry can be a good employer for people with a distance to the labour market.

- Jasper Kool, Happy Tosti

3 Conditions for success

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The tourism industry has a major impact on society which will only increase in the future. It is, therefore, of the utmost importance to invest in and further professionalise this industry. This way we can ensure that visitors contribute even more meaningfully to the prosperity and well-being of our country.

A. Tourism as a policy priority

Tourism deserves to be **given policy priority and capacity**. We will be able to successfully develop the visitor economy with coordination, mandates and resources from the government, in combination with other industries and to the benefit of the public interest.

A lot is already being done, and a lot more will have to be done before 2030. Visitors see tourism as the sum of all of their experiences, big or small. These experiences are fragmented and not organised centrally; not on a policy level nor on a sectoral level. This means that players in the visitor economy have to get to work to start organising and collaborating. They also have to take action together to achieve this. Governments will also have an explicit part to play.

The complexity and horizon of these challenges requires connections between policy areas and enough opportunities to innovate and experiment. Many parties acknowledge the need and added value of **independent national coordination and perseverance**.

In order to discourage fragmentation, we need a **Tourism Pact**. We need closer collaboration and alignment between public and private organisations and residents, on a national, provincial and municipal level. This also applies to the collaboration between various leisure facilities. Specific strategic issues require leadership and prioritisation of relevant departments within the national government and on a European and international context as well.

Changing role DMOs

There is a need for more and improved knowledge and capacity within municipalities, provinces and the national government regarding tourism in general and placemaking in particular.

To adequately respond to current and future opportunities and challenges in the visitor economy, it is necessary to broaden the role of DMOs from **destination marketing to destination management**. DMOs can make connections and ensure coordination on both a local and regional level, and they can be sparring partners on a national level.

It is of great economic importance that the development of rural areas becomes a collective effort. There are too many separate parts, and everyone only looks after their own part and their own interests. We have to think bigger. Tourists, after all, do not see political boundaries between municipalities or provinces.

- Sylvo Thijsen, Staatsbosbeheer

B. Joint action and investment agenda

This destination perspective needs to be specified. Many challenges are long-term, broader than just our own industry, require a supra-regional and cross-sectoral approach and have an R&D character. This requires **public-private investments**, linked to specific projects. It requires a national action and investment agenda that central government, provinces, entrepreneurs and marketing organisations will develop and support together; based on shared interests and as a part of creating a liveable country. We also need **new public-private financing constructions**.

Government culture funds insufficiently focus on developing new icons in new places. This should change.

- Frank van den Eijnden, Van Gogh Heritage Foundation

These financing constructions may be achieved by having **multiple industries concerned work together** and by **redirecting taxes directly back** to initiatives that contribute to the strategic priorities.

C. National Data Alliance

Data and insights give direction to decision-making, development, behaviour and policies and they contribute to creating support. Existing sources are fragmented, incomplete, outdated, are available too late or not at all. There is a need for up-to-date, complete and new data.

We need to develop an independent **data alliance for tourism** in order that we can share existing data and knowledge on both a regional and a national level. Additional research can help collect missing data. Having relevant data and insights is essential for effective policies and the competitive power of entrepreneurs.

The government should do more to encourage innovation, not just in respect of sustainability, but also within the tourism industry with a focus on further professionalisation and digitisation.

- Annelie Bleckman, Camp site It Wiid



The power of co-creation

Perspective Destination Holland 2030 is a vision for and by the visitor economy and for the whole of the Netherlands. It is also a combination of a number of major public and private parties that influence or are influenced by domestic and international visitors.

We thank everyone wholeheartedly for their input and contribution to this vision. We believe that it is an inspiring start to debates and dialogues that will result in effective cooperative initiatives and actions.

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