

Perspective 2030

Foreword & Summary

Foreword

Tourists tend to have a fresh look on things. What is quite normal to us, may be very special to them. In the past years, 1.3 billion global travelers, including ourselves, admired a variety of places around the world. The UNWTO expects there to be 1.8 billion by 2030. World citizens searching for memorable experiences. This represents enormous power — power that we want to cherish and employ, and guide towards beneficial ends, including in Holland.

The debate on this subject that occurred in the Lower House early 2018 is the reason this Perspective 2030 was developed.

NBTC picked up the gauntlet and went through a comprehensive co-creation process with over one hundred stakeholders from the industry and beyond, to develop this vision. We would like to thank everyone who contributed to date. Perspective 2030 is about the destination Holland. About the transformative power of tourism and the contribution of this industry to the social challenges of our country. The vision takes the big differences between cities and regions into consideration. It rises above individual actors and touches upon a range of neighboring industries and policy areas. Direct and indirect stakeholders, including NBTC, choose how they want to contribute to the perspective.

The social awareness of tourism is changing, among travelers, locals, the business community, and administrators. The coming decade demands a different perspective and approach than was used in the past ten years. The future requires new paradigms as a basis for new content and processes, new KPIs, and changing roles.

This Perspective 2030 and the Tourism Summit represent the start of a dialog on tourism.

Together, we will initiate a shift towards action to the benefit of the country in which we live, work, and enjoy leisure time, in which guests feel welcome and are happy to visit, and in which businesses can flourish. In other words, a country from which we all benefit.

Collaborating on the realization of this vision is not a linear process, nor is it a *quick win*. It demands extra effort and collaboration across geographic, sectoral and departmental boundaries, where conflicting interests may exist.

It is well worth the trouble to leverage the transformative power of tourism together. We would like to call on the government to provide support in this process and provide the required policy prioritization and facilitation.

Reactions that were received after the presentation of the Perspective 2030 at the Tourism Top on 10 October 2018 have been incorporated into this definitive version insofar as relevant.





Henceforth, we will be working to realize an action program and support organization.

To date, we have received a lot of support for the perspective, as well as enthusiasm to collaborate on its realization. A skeptical attitude is a natural part of such a process, but this is not the time to stand on the sidelines. Come join us and contribute to the further realization of Perspective 2030.

Standing strong together for a loved, livable and valuable Holland.

Jos Vranken
Managing Director of NBTC Holland Marketing

Summary

A new vision of destination Holland benefiting the well-being of every Dutch citizen

The opportunities and challenges of tourism

Tourism has many benefits. It makes our world bigger and makes us proud of Holland, looking through the eyes of others. In terms of the economy, tourism also generates a lot of value. To date, the Dutch government and hospitality industry focus primarily on promoting destination Holland to draw more visitors. We can now say that more is not always better, certainly not everywhere.

From promotion to destination management

The number of domestic and incoming visitors in Holland will set new records. Conservative estimates predict that the number of incoming visitors will grow by at least 50% from 18 million in 2017 to 29 million in 2030. If the growth of the past few years continues exponentially, this might amount to as many as 42 million international guests by 2030 (NBTC, 2018).

Particularly in cities and iconic locations, excessive pressure may impact livability, whereas other places in Holland still benefit insufficiently from the opportunities and economic impulse that tourism may provide. To control visitor flow and leverage the opportunities that tourism brings with it, we must act now. Instead of destination promotion, it is now time for destination management.

Tourism as a tool

This vision aims to achieve the future-proof development of destination Holland, as a loved, valuable and livable destination. To this end, we want to approach tourism as a means to contribute to solving bigger social issues that have an impact on our prosperity and well-being. So that every Dutch citizen will benefit from tourism in 2030.

The main themes are:

- Reinforcing the Dutch identity.
- Improving livability.
- Realizing our sustainability objectives.
- Creating new jobs.

Focus on shared interest; locals catching up

All of these themes unite the interests of different stakeholders: visitors, locals, and businesses. In order for Holland to be developed in a future-proof way, we must opt for activities that contribute to the shared interests of these groups. Too often, the interests of the local population have been considered of lesser importance in developing tourism.



This is where we need to catch up.

Our ambition: By 2030, every Dutch citizen will benefit from tourism

5 Strategic pillars

Tourism is a tool to solve bigger social issues that contribute to the general and shared interest of Holland (well-being and prosperity). In order to serve this interest and build a *loved, valuable and livable destination*, we have formulated a number of strategic priorities that will guide the development towards 2030.

1. Balance of benefits and burdens

We must actively focus on increasing the benefits of visits for all Dutch citizens and the associated improved awareness. Furthermore, we must actively and visibly reduce the burdens associated with visits to an acceptable minimum.

2. All of Holland attractive

We want to draw different visitors to different places in Holland, where possible at different times. To achieve this, we need to improve the current offering and develop a new offering, as well as put the spotlight on unknown areas. By distributing future visitors more evenly across Holland, more regions and locals will benefit from the value of visits.

3. Accessible and reachable

We need an integrated approach for transport by air, railway, road and water. Locals and visitors will benefit from sustainable mobility solutions that lead to optimal accessibility, from the first to the last mile. Mobility that is in line with the needs and behavior of visitors as well as locals.

4. Sustainability is a must

With an eye to the defined climate objectives and safeguarding a vital living environment for all Dutch citizens, the visitor economy has a responsibility to improve its sustainability, employ raw materials in a circular manner, prevent pollution and waste, and minimize CO2 emissions.

5. A hospitable industry

Hospitality is the foundation of an attractive destination. For an optimum hospitality experience, we need to invest in the image, professionalism and attractiveness of the industry as an employer through new forms of training and development, attracting new employees, and offering opportunities for future career development.





Prerequisites for success

A. Tourism as a policy priority

Tourism deserves to be a policy priority. There is a need for a cross-industry tourism pact. Above all, this means that players in the visitor economy must take joint action to concretize the perspective. The authorities also play an essential role in this respect. The complexity and horizon of tasks imposes links between policy areas. Many acknowledge the need for and added value of independent national coordination and perseverance.

B. Joint action and investment agenda

Additional investment in (regional) development, innovation, collaboration and policy is necessary. This requires public/private investments linked to concrete projects. A national action and investment agenda should be elaborated and implemented by the State, provinces, business community and marketing organizations.

C. National data alliance

We need up-to-date, complete and new data. We need to develop an (independent) data alliance for tourism. This will be used to share existing data and knowledge at both the regional and the national level. Moreover, additional research will serve to collect missing data.

