



Societal Value of Tourism and Recreation

Preface

What would the world and our country look like without a hospitality sector? An essential question in this corona time.

Accounting for an annual turnover of 91.2 billion euro and employment for 813,000 people, the broad hospitality sector - including domestic, inbound and outbound tourism, overnight and daytrip recreation, hospitality, sports, culture, trade fairs, exhibitions and conferences, transportation of tourists and recreationists, and events - is of evident economic significance. This report will demonstrate that the sector is also deeply rooted in and contributes to our society. Gastvrij Nederland commissioned CELTH, the Centre of Expertise Leisure Tourism and Hospitality of Breda University of Applied Sciences (BUAs), HZ University of Applied Sciences (HZ) and NHL Stenden University of Applied Sciences (NHL Stenden) to undertake a study of the societal value of the sector, and how this value can be preserved and enhanced.

The sector feels a strong responsibility for our health and well-being: by facilitating mutual connection and (business) meetings between people, by encouraging people to get moving – literally and figuratively – and spend their leisure time in a meaningful manner, by livening things up and by providing much-needed knowledge and relaxation. If the corona pandemic has taught us anything, it is how deeply these basic human needs are ingrained in our collective DNA.

The Netherlands is yearning for breathing space and freedom. A major challenge awaits in terms of working towards sustainable economic recovery, restoration of the well-being of all Dutch people and reconstruction of an attractive living environment after corona. A well-balanced development of tourism and recreation

will make an indispensable contribution to this. Entrepreneurs in the hospitality sector are chomping at the bit to make this possible. The right preconditions are needed to preserve and enhance the positive societal value of tourism and recreation. Close cooperation between government authorities, entrepreneurs and education and knowledge institutes, as well as the active involvement of local residents, is necessary. This study describes the need and provides comprehensive justification for it. We call on all government authorities at all levels – national, provincial and municipal – to join us in enabling everyone to enjoy what the hospitality sector has to offer.

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Summary

What would Dutch society lose if the Tourism and Recreation sector does not survive and what is needed to preserve its societal value and, preferably even, enhance this value? Gastvrij Nederland asked CELTH, the Centre of Expertise Leisure, Tourism & Hospitality of Breda University of Applied Sciences, HZ University of Applied Sciences and NHL Stenden University of Applied Sciences to answer this question.

In this report we have set out the societal value of tourism and recreation (T&R) across the full breadth of the sector (*including domestic, inbound and outbound tourism, overnight and daytrip recreation, hospitality, sports, culture, business hospitality, transportation of tourists and recreationists, and events*). In the pre-corona age, the sector's value mainly used to be translated into its huge direct economic value. On the one hand this is logical and justified, given the enormous contribution of T&R to the Dutch GDP and employment, on the other hand the sector is more than just turnover and jobs. After all, the importance of T&R is deeply embedded in society. The sector contributes to the success of other sectors (revenue and employment for suppliers, business climate, etc.) and contributes to societal challenges (quality of life, happiness, inclusion, etc.).

We used a combination of methods to answer the research question: a literature study, case studies, and a survey among

entrepreneurs. A substantial number of scientific articles, advisory reports and conference contributions were analysed in various contexts and for different forms of T&R. In *the literature study* we brought together the societal contributions in a structured manner. The cases reflect the breadth of the sector and serve as good examples of how the sector achieves its societal value, but they also illustrate the challenges. The *survey* produced several insights. We asked respondents, for instance, to indicate for each societal value whether they saw a positive, negative or no contribution of the sector. By means of a points system, we composed a top 25.

Table 1 presents this top 25. We will use this table, in this summary, to structure the findings from our study.

Table 1. List of scores from the survey into the contribution of T&R to societal values

| Indicator | Position in Top 25 | % Positive influence | % Negative influence |
|--|--------------------|----------------------|----------------------|
| Employment | 1 | 97% | 0% |
| Revenue for business, residents and government | 2 | 96% | 0% |
| Revenue for suppliers | 3 | 95% | 0% |
| Quality and quantity of hospitality establishments | 4 | 94% | 6% |
| Quality and quantity of recreational facilities (museums, theme parks, etc.) | 5 | 91% | 2% |
| Business climate of the region | 6 | 82% | 2% |
| Route networks for cycling, walking, boating, etc. | 7 | 92% | 2% |
| T&R decreases dependency on other sectors (negative influence: region is too dependent on T&R) | 8 | 69% | 21% |
| Quality of cultural heritage | 9 | 87% | 3% |
| Special or leading events | 10 | 85% | 2% |
| Residents' pride with the region | 11 | 92% | 5% |
| Quality of natural heritage | 12 | 68% | 25% |
| Meetings between people | 13 | 85% | 4% |
| Diversity | 14 | 71% | 7% |
| Inclusiveness | 15 | 73% | 4% |
| Quantity and quality of public facilities | 16 | 59% | 3% |
| Knowledge development and innovation | 17 | 75% | 1% |
| Education and jobs for underprivileged people | 18 | 60% | 2% |
| Quality and quantity of retail | 19 | 83% | 7% |
| Opportunities for employees in terms of acquiring skills | 20 | 88% | 1% |
| Career prospects | 21 | 79% | 0% |
| Social cohesion | 22 | 58% | 11% |
| Infrastructure and mobility | 23 | 68% | 15% |
| Quality of public spaces | 24 | 77% | 9% |
| Quality and quantity of public transport | 25 | 65% | 4% |

- Economic value
- Value for the living environment
- Value for social processes

Economic value

Not surprisingly, **economic values** score highly. The contribution of T&R to revenue of business, residents and government (no. 2 in the top 25) is widely acknowledged. In 2019, the year prior to the corona pandemic, the economic impact of the sector in the Netherlands was based on 91.2 billion in tourism and recreation spending. This concerns spending by Dutch and foreign daytrip and overnight visitors in the Netherlands, but also spending in the Netherlands by outbound tourists. This spending led in 2019 to a contribution of 4.4% to the Dutch GDP, considerably more than agriculture (nearly twice as much) and oil and gas extraction, and a share in employment (no. 1 in the top 25) of 7.5% (813,000 jobs). Apart from the absolute number of jobs, the sector also creates value due to the diversity of jobs; diversity in terms of types of positions and required qualifications. Within the sector, people can also learn new skills (no. 20) and lay a foundation for their future career (no. 21). Suppliers and staff of suppliers also benefit from T&R. The indirect effects lead to revenue and employment for these suppliers (no. 3).

T&R is closely related to other sectors. T&R can make a region less dependent on other sectors (no. 8), although the literature and the sector also warn against too much dependence on T&R. Several tourism and recreation organisations/companies, such as the Textielmuseum (Textile Museum), support a specific sector, and bring it to the attention of the public. This can contribute to the level of support and acceptance for this sector (for example, in the form of subsidies), changes in consumer behaviour, and create interest in working in that specific sector. T&R can boost the local economy and contribute to the business climate (no. 6). More visits lead to more revenue, more employment and more spending. As a result, the threshold value of shops and other facilities is reached more quickly, giving rise to more opportunities for both existing and new businesses. This is particularly interesting for regions that

are confronted with population contraction. It was demonstrated that T&R has a price-increasing effect, which enables the companies in the tourism region to achieve higher margins. In the housing market, generally speaking, property prices rise when a destination is in demand by tourists. This is a positive thing for property owners. The downside, which is that both developments may also confront residents with higher prices, is compensated – either fully or partially – by the fact that residents, via T&R, gain access to more opportunities in terms of work and income. For instance, T&R can make a positive contribution to the opportunities for residents to make a living. The interconnectedness of T&R with other sectors and with society calls for collaboration with other sectors. From the perspective of this collaboration, T&R can serve as an innovative resource (no. 17).

Value of participation in T&R

Participation in T&R is of major value to all people. The relationship between well-being and leisure has been widely researched and proven. One of the basic concepts in this respect is ‘happiness’. Holiday-makers generally feel better during their holiday, compared to their everyday lives. This stems from psychological well-being and psychological growth (fun and relaxation reduce stress and T&R creates scope for reflection), being active, connections with others (contact, sociability, emotional security, love, social connectedness, and a ‘we’ feeling), satisfaction about their spending, and comfort. The respondents of this survey acknowledge this and indicate that their clients are primarily looking for relaxation, fun, inspiration, social contact and reflection.

Value for the living environment

The value of tourism for the **living environment** is explicitly represented in the above-mentioned top 25 values. The living environment is part of the tourism and recreation product and, at the same time, is influenced by it. As a result, T&R has a direct influence, both positively and negatively, on residents' quality of life. Although several population surveys (in the provinces of Friesland, Limburg, Zeeland) show that residents mainly support T&R, they do not close their eyes to its potentially negative effects.

One of the ways in which T&R contributes (directly) to the living environment, involves the fact that tourism and recreation facilities and hospitality businesses offer their services and products to residents within the region (no. 4 and 5). These residents are often even their regular guests. Here, residents find relaxation and distraction, and the products and services (provided that there is sufficient quantity, quality and diversity) may improve their quality of life and appreciation of their living environment. The businesses/organisations that took part in the survey mention their active contribution to the realisation of route networks for cycling, walking and boating (no. 7). As for the organisation of leading business and public events (no. 10), it is reported that the presence of tourists and recreationists and the attendant facilities make a region interesting in terms of planning events on the one hand, and that these events contribute to the attractiveness of the region for visitors on the other hand.

The contribution of T&R to retail (no. 19) is created when it actually leads to a diverse and high-quality range of products and services, or can ensure that certain desired products and services do not disappear. This downside is also referred to in the literature and the survey; when there are too many visitors or visitors are incompatible with the range of products and services on offer, the chance of overexploitation is great. Just

think of the one-sided range of, for instance, cheese and souvenir shops in Amsterdam city centre.

As for the relationship between T&R and cultural (no. 9) and natural (no. 12) heritage, heritage makes the region attractive to tourists and recreationists on the one hand and T&R can contribute to the preservation and accessibility of this heritage on the other hand. Just think of revenue from visitor spending used for maintenance, preserving crafts and traditions, investments from the sector in culture and nature, T&R as a justification for government investments in nature and culture, and raising awareness for the value of nature and culture. Proper destination management, however, is needed to avoid that (too much) T&R puts too much pressure on this heritage and/or leads to high/higher costs of maintenance. The sector acknowledges this and is mindful, for example, of the development of tourism and recreation facilities in line with the existing style of the cultural heritage, waste management, circular construction/building, and other sustainability elements. Respondents of the survey and various resident surveys acknowledge the positive contribution of T&R to public facilities and infrastructure (no. 16). They see that T&R leads to more investments and a higher level of support and acceptance for new public facilities, such as public transport, healthcare, police and road network, and that synergy can arise between the needs of visitors and residents (just think of bus services for tourists that can also be used by residents). Of course, there is also a downside here: visitors can also cause pressure on these facilities. It is important for visitors to be included in the planning and budget of the facilities. As for the quality of public spaces (no. 24) too, residents realise that the investments made from the perspective of T&R can also work out positively for them. Moreover, the presence of tourists and recreationists brings atmosphere, liveliness and sociability. In places where there are (too) many tourists, however, the influence can turn around from positive to negative.

Value for social processes

The contributions that T&R makes to **social processes** can mainly be found in the second half of the top 25. After all, these are effects that not everyone will notice immediately or that may be somewhat less obvious.

The presence of tourists and recreationists can contribute to a sense of safety. This is the case, for instance, when planners provide for cycling and walking paths, green infrastructure and routes designed to accommodate visitor flows. At the same time, T&R can also have a negative influence on perceived safety (theft, gambling, vandalism, addiction).

A lot has been written about T&R and regional pride (no. 11). With the arrival of visitors, residents appreciate their own living environment and culture differently. They feel proud, because apparently their region is worth coming to. Tourism and recreation facilities (sport stadiums, museums, special buildings) take on iconic value, which contributes to the region's identity. The use of regional stories, meaning and symbols within tourism may further strengthen that identity, although the danger of commodification is lurking. Involving residents in destination development is a condition to facilitate growth of the identity and culture rather than damage them.

T&R can lead to cultural exchange (referred to in the survey as 'meetings between people' – no. 13). When groups of people from different backgrounds and cultures have contact with and get to know each other, they can eliminate prejudice and make friends. Contacts between residents and tourism/recreation businesses are an extension of contacts between residents and visitors. The businesses/organisations that took part in the survey regard residents as guests (52%), employees (50%), ambassadors (30%) or advisors (27%) and rate their contacts with them primarily as (highly) intensive (56%) and (highly) positive (80%). Of the organisations, 80% feel that residents are aware of the societal value of T&R. Of the respondents, 70% believe that this also applies to the image that residents have of their organisation specifically.

Within the businesses/organisations of the T&R sector there are employees with many different backgrounds, ages and levels of education. That is why inclusiveness (no. 15) is important to the tourism and recreation sector. The sector offers employment for, among others, lowly skilled workers, women, youth and people in rural (shrinking) regions – and offers education and jobs to underprivileged people (no. 18). The sector is also becoming increasingly aware of diversity (no. 14). Just think of museums and other cultural institutions which actively promote diversity. As a consequence of the role that the sector plays in bringing people together (also see above), it may contribute significantly to social cohesion (no. 22).

Conclusions and recommendations

Based on the foregoing, the conclusion is that T&R should be regarded as an economic sector of considerable size, which contributes indirectly to many other sectors, enhances quality of life, makes people happier, connects groups of people, and as such, serves as the 'social cement between the bricks'. The measures introduced as a result of the corona pandemic have explicitly revealed the effects that the near closure of the sector has on society.

We have also arrived at the conclusion that the sector needs assistance and preconditions in order to preserve its societal value and, if possible, enhance this value. In the survey and the cases, we interviewed organisations/businesses from the sector about what roles the various stakeholders in their environment should play. Relevant stakeholders mentioned include government authorities (national, provincial, local), sector organisations, education and knowledge institutes, banks and the UWV (Employee Insurance Agency). The organisations/businesses reported that the preservation and/or enhancement of societal value requires a distinct focus

– in conjunction with these stakeholders – on *collaboration, involving residents, and developing and sharing knowledge about achieving balance.*

The fact that the sector is closely entwined with and related to many other sectors and policy domains (nature, health, infrastructure, spatial planning, water, mobility, liveability, health and well-being) means that all government authorities and levels are asked to apply a broad-based and integrated course of action and facilitate proper coordination and alignment with other sectors. Furthermore, it is important to think and move along with them and support them in new initiatives.

The advice for the *national government* is to reduce its distance to entrepreneurs by taking T&R – as a business sector – seriously, focusing more explicitly on the national government's knowledge about and of T&R, embedding T&R in a logical position within the national government, and by taking control as the national government. To date, proper coordination is lacking, and crucial choices are too often left to provinces, municipalities and other decentral-level parties, without a clear assessment framework. The national government is asked to emphatically take up this gauntlet.



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Introduction

In pre-Corona times, the importance of the entire tourism and recreation sector, including domestic, inbound and outbound tourism, overnight holidays and day trips, hospitality, sports, culture, business hospitality, transportation of tourists and holidaymakers, and events, was mainly construed in terms of its huge direct economic value. This is logical and justified given the significant contribution of tourism and recreation to Dutch GDP and employment, but the sector is more than just revenue and jobs. In the remainder of this report, tourism and recreation, including business tourism, is referred to as T&R.

Indeed, the importance of T&R is deeply intertwined in society: the sector contributes to the success of other sectors, such as a source of revenue and employment for suppliers, the business climate, etc., and contributes to societal issues, such as quality of life, happiness, inclusion, etc. This has become increasingly evident during the present corona pandemic. Everyday things, such as human contact, can no longer be taken for granted. T&R normally plays an important role facilitating this. What would Dutch society lose if T&R does not survive and what is needed to preserve its societal value and, preferably, enhance this value? Gastvrij Nederland (GVNL) asked the Centre of Expertise Leisure Tourism & Hospitality (CELTH) of Breda University of Applied Sciences (BUas), the HZ University of Applied Sciences (HZ) and the NHL Stenden University of Applied Sciences (NHL Stenden), for answers to this question.

This involves benefits to the entire sector. GVNL is a bundling of seventeen organisations and industries in the tourism-recreation sector, including business tourism. Jointly, the organisations/companies that it represents provide a range of welcoming, accessible, versatile, surprising and high-quality activities. Each member of GVNL makes a unique contribution. This report has been compiled specifically in connection with the elections for the Lower House of Parliament to be held on 17 March 2021. In the run-up to these elections, it is important that GVNL and affiliated industries are able to provide political parties and the public with well-founded insight into the benefits of T&R in the Netherlands.

Report design

To clarify the benefits of T&R, our report is comprised of three parts: a literature review, a survey and nine case studies.

1. Literature review

This part of the report explores and brings together existing knowledge and data. A considerable number of scientific articles, advisory reports and conference proceedings have been analysed in different contexts and with regard to different forms of T&R. This report has compiled the societal contributions in a structured way.

2. Survey

By posing questions to organisations/companies affiliated with industry associations that are part of GVNL, we gained insight into how these organisations/companies perceive their societal value, how these benefits are created, what opportunities they see to maintain and/or increase these benefits in the future and what roles they see for themselves and other parties in this regard. The survey was fully completed by 277 respondents¹. Table 2 below shows how these respondents are distributed over the various types of organisations/companies.

Several insights emerged from the survey, which we have included in the following sections. For example, we asked the respondents to indicate for each societal value whether they thought it had a positive, negative or no contribution to the sector. For example, do they see T&R as making a positive contribution to 'revenues of business, residents and government', 'making residents proud' or 'quality of public spaces'? We then asked each respondent to rank the top five positive contributions, with the first being the most important societal value of T&R. This benefit was given 5 points. The 2nd place benefit was given 4 points, and so on. By adding all the points together we compiled a top 25. In the following sections, we will show how each of the different benefits ranks in the top 25.

We also asked respondents how their own organisation/company contributes to realising societal value. We use these explanations to explain why some benefits score higher or lower in terms of percentages/rankings, but also to form a clear picture of how the contribution is calculated for the sector as a whole. Finally, we selected a number of representative or special quotes from the survey. In this report, we highlight these to further emphasise how respondents view societal value.

1. A total of 77 surveys were not fully completed, but they were partially usable. We included the answers of respondents who did not complete the entire survey in our analysis of the results of individual questions..

Table 2. Verdeling respondentent survey

| Subsector T&R | Number of respondents | Percentage |
|--|-----------------------|------------|
| Museum/Open monument | 77 | 34% |
| Travel agency (private and business) | 48 | 21% |
| Hotels, restaurants and bars | 39 | 17% |
| National Tourism Organisation (NTO)/Destination Marketing Organisation (DMO) | 19 | 8% |
| Cultural institutions | 8 | 4% |
| Water sports/round trips/marina/outdoor sports | 9 | 4% |
| Attractions | 6 | 3% |
| Camping/bungalow park | 5 | 2% |
| Event/festival organiser | 3 | 1% |
| Other | 13 | 6% |

3. Cases

In the third part of the report, we focus on nine cases. These cases reflect the broad scope of the sector and have been agreed with the GVNL representatives. They serve as good examples of how the sector realises its societal value, but they also illustrate the issues facing the various industries. We talked to the stakeholders about the current societal value, how to optimise the benefits of this, the obstacles

they face and the division of roles between businesses, stakeholders, governments and other parties. Specific attention was paid to the roles, tasks and actions that are needed from the various authorities. We use boxes marked in yellow, such as 'Case description 1', to indicate what insight is provided by the cases with regard to the realisation of various societal values. Table 3 shows which cases were included in the study.

Table 3. Overview of cases

| | Case | Waarom |
|---|---|--|
| 1 | Watersport Campsite Heeg (Heeg) | Corporate social responsibility has always been important to Watersport Camping Heeg. As a result, there are many sustainable, green initiatives on the campsite, as well as creative cultural projects. |
| 2 | Suzie's Farm (Aalten) | Farm, Food, Fun are the keywords of Suzie's Farm. It offers a total farm experience that includes products from its farm and activities. In this way, Suzie's Farm showcases farmers. |
| 3 | Untourist guide (Amsterdam) | This non-profit organisation offers a variety of exceptional activities that enable visitors to contribute to the environment in a positive way. |
| 4 | Hotel Pincoffs (Rotterdam) | Residents in the area felt that the neighbourhood was becoming very barren. The hotel owner, in consultation with the neighbourhood, took the initiative to plant more greenery. This makes the neighbourhood a more pleasant living area, both for residents and visitors. In this way, a business tackled a societal issue without just leaving it to the government. |
| 5 | Diergaarde Blijdorp / Rotterdam Zoo (Rotterdam) | Besides being an amusement park, Blijdorp Zoo is also a scientific institution with development and conservation goals. It also organises activities for the disabled and blind. |
| 6 | Café Centraal (Soest) | This café and catering business offers job opportunities to people with physical and mental disabilities. It is also very active in the community; providing input, organising events and contributing to urban development. |
| 7 | TextielMuseum (Tilburg) | The TextielMuseum and the TextielLab are mindful of their social role as a museum and incubation centre. They work closely together with a work placement company (formerly social employment) that assists people with poor job prospects to find employment. This gives them a chance to participate in society. These people work in various departments within the museum, from security to administration to the innovative TextielLab. |
| 8 | RAI (Amsterdam) | The RAI is involved in sustainability in a broad sense: zero waste, climate-neutral operations, a sustainable product range, smart waste recycling and sustainable energy and mobility. |
| 9 | Better Places | A travel organisation that focuses on sustainability, including social sustainability. Think about the search for mutual understanding between cultures and a focus on a healthy environment for both holidaymakers and residents. The travel they organise has the goal of supporting the local economy (fair trade) as well as protecting animals and nature. |

Overview

In this report, we first consider the sector's economic value (Section 2) and then its societal value (Section 3). In both sections, we look at WHAT the current societal values are, based mainly on the literature and survey, and HOW these arise, based on literature, the survey and case studies. In Section 4, we discuss how the sector is in the process of increasing its societal value. This is mainly based on the insights derived from the survey. Finally, in Section 5, we show the roles various parties, such as governments, trade associations, educational and knowledge institutions, banks and the UWV as well as businesses/organisations in the sector play or could play to further increase its societal value. Section 6 summarises the main conclusions and recommendations.





Photo: Bollendak@Juri Hiensch, Utrecht

The Economic Benefits of Tourism and Recreation

T&R creates considerable economic value¹. Spending within the sector leads directly and indirectly to revenue and employment in regions where people spend their holidays and business and leisure time. T&R can draw attention to a specific sector, such as the TextielMuseum, and can contribute to the business climate of a region as well as having an impact on the level of pricing and the ease with which residents can earn a living. We will discuss all these elements below.

Increasing expenditure and 98.7% leisure participation

Until last year, the sector in the Netherlands was flourishing, and this is reflected in the steady growth in spending over the past 10 years (2010-2019). The total tourism-recreational expenditure in the Netherlands in 2019 was almost 91.2 billion euros. This is 5.4% higher than in 2018 and 53% higher than in 2010. This 5.4% growth in tourist spending is due to spending by both domestic and foreign tourists. In 2019, domestic tourists/business tourists/holidaymakers spent 53.2 billion euros, of which 46.6 billion euros were spent on holidays and day trips. Most of this expenditure was on food and drinks in hotels, restaurants and bars, but it was also spent on fuel, sports and entertainment. Spending by foreign tourists/business tourists/holidaymakers in the Netherlands totalled 34.7 billion euros in 2019, an increase of 7.8% compared to the previous year¹¹. Of this, over 17 billion euros (2/3rds) was spent during a stay in the Netherlands¹².

Other spending on durable leisure goods and social transfers amounted to 3.2 billion euros. The average holidaymaker spent 595 euros per stay in the Netherlands and the average business traveller 1,045 euros².

The leisure participation rate of the Dutch population was 98.7% in 2018. This means that in the year 2018, approximately 16.6 million Dutch people undertook at least one leisure activity of more than one hour outside the home. In 2018, almost 68 billion euros was spent on these activities. This is an average of 18.75 euros per person per activity. Of this 68 billion euros, almost 42.7 billion euros was spent on leisure activities outside the home; this is an average of 11.81 euros per person per activity. Most of this amount is spent in shops and on food and drinks. The remaining 25.1 billion euros is expenditure related to transport (22.8 billion euros) and fixed costs such as subscriptions and memberships (2.3 billion euros). This works out to an average of 6.94 euros per person per activity³.

Host to 46 million people

In 2018, the Netherlands received a total of approximately 46 million guests⁴ in tourist accommodation such as hotels, motels, guest houses, apartments with hotel service, youth accommodation, B&B, camping sites, cottage sites and group accommodations in 2019, and over 19 million people attended a performance of theatre, music, dance and movement, cabaret and others in the Netherlands⁵. These figures give an indication of how extensive the sector actually is. And this leads to extensive spending.

This is illustrated by an example from one of the industries: according to CBS, in 2018, the total revenue of the 26,510 sports clubs in

the Netherlands, excluding water sports and exclusively professional sports clubs, was 1.2 billion euros⁶. The Sports Enterprise Platform (Platform Ondernemende Sportaanbieders) has provided an overview of the statistics, such as the number of companies, number of employees, turnover, number of regular sportsmen and sportswomen, of the different industries. By 2019, these 'enterprising sports providers' generated revenue of almost 4.4 billion euros. All of this revenue benefits local businesses and private individuals, and may provide a point of reference for social issues.

In our survey, it is notable that only a very limited number of respondents filled in something regarding the role of their own organisation in generating revenue, despite

the top position of this indicator (96% recognise the positive contribution of T&R to revenue and this benefit is ranked 2nd in the top 25. See Table 4). One explanation may be that organisations see this as ‘self-evident’: because they exist, they generate revenue. However, as outlined earlier, this revenue is an important part of the Dutch economy. In the survey, several Destination Marketing Organisations (DMOs) emphasise that the positive influence of tourism contributes to revenue for businesses, residents and government. This is done both by attracting visitors, including business visitors, and by encouraging recreation in their region. DMOs also consider encouraging multi-day trips to be a good way to attract additional spending. For instance see Case study 1, in which several business owners talk about how many people rely on T&R for their income.

“It is actually good that tourism is growing because it makes them less dependent on other sectors.”

~

“There is more diversity of sources of revenue in Limburg without suppressing other sectors.”

~

“The Twente region still relies heavily on revenue from agriculture and dairy farming. It is important to have a diversity of revenue in order to be able to absorb disappointing revenue from a sector.”

~

“Over-reliance on tourism is the other side of the positive coin and we are now seeing a huge decline in tourism to foreign regions due to travel bans and corona fears.”

The answers to the question about the economic dependence of a region on T&R seem to be very region-dependent. Some 21% of respondents said the region is too dependent on tourism. Other respondents (69%) say that the growth of tourism is actually positive because it reduces dependence on other sectors.

The above conclusions apply to the Netherlands and Dutch regions, but we see this same picture for outbound tourism and its effect on the regions visited. Many of the

tour operators who participated in the survey emphasise the important contribution that tourism makes to revenue and employment in the regions where they send tourists. Consider, for example, the use of local hotels, restaurants and bars as well as visits to local museums and attractions. Several tour operators consciously contribute to this by using local service providers, such as accommodations, executive agents, excursion/workshop providers, bus companies/transfers, suppliers, and local staff as much as possible and in a sustainable manner. Not surprisingly, these are often in regions that lack abundant revenue and work in other sectors. One of the survey participants states: “Tourism is the most stable form of development aid.” At the same time, respondents point out the risks involved when regions are too dependent on tourism, including regions outside the Netherlands. The present situation has clearly shown this.

The Netherlands also profits significantly from spending by Dutch people on foreign holidays. In 2018, 27% of the total spending of Dutch people on foreign travel was paid to Dutch companies. These include revenue from taxi and train transport, travel agencies and duty-free shops at Schiphol Airport. In 2018, this was a direct contribution of 6.6 billion euros, which amounts to 0.85% of total earnings in the Netherlands each year⁷.

Finally, according to CBS, in 2015 (the most recent figures) Dutch people spent some 3.2 billion euros on durable goods directly related to holidays, such as caravans, camper vans, tents and suitcases⁸.

Table 4. Survey result ‘Revenue for businesses, residents and government’ and ‘T&R makes us less dependent/Region too dependent on T&R’

| Indicator | % Positive influence | % Negative influence | Position in Top 25 |
|---|----------------------|----------------------|--------------------|
| Revenue for businesses, residents and government | 96% | 0% | 2 |
| T&R makes us less dependent on other sectors (Negative impact: Region too dependent on T&R) | 69% | 21% | 8 |

Case study 1: Dependence of Amsterdam on T&R (multiple business owners).

Prior to the corona pandemic, the municipality of Amsterdam developed policies to counteract the growth of tourism and some of its negative effects. Some of the business owners we spoke to as part of the case studies were critical of that attitude: many people are dependent on tourism for their income. Business owners now see the municipality taking a more positive approach, partly motivated by the fact that it is missing out on revenue due to the decline in T&R. This positive approach has been missing in recent years. In the rest of the Netherlands, most business owners said there was and is a strong demand for T&R growth.



Photo: 1st Back to live event Fieldlab photographer Nico Alsemgeest

A contribution of 4.4% to the GDP of the Netherlands

CBS figures show an increase in the contribution of T&R to gross domestic product since 2010 (GDP)⁹. In 2018, the sector contributed almost as much to GDP as the construction and transport and storage sectors, at around 30.3 billion euros². In fact, the sector contributes more than agriculture (almost 2x as much) and oil and gas extraction¹⁰. In 2019, the benefit increased even further; 5% compared to 2018. The contribution of T&R to Dutch GDP thus rose to 4.4%¹¹. Hotels, restaurants and bars contributed the most within the sector at 39.4%. Aviation, travel agencies and intermediaries contributed 23.9%. Sports, recreation and gambling contributed 8.8% and arts, culture and hobby clubs contributed 5.3%¹¹.

2. GDP is the total monetary or market value of all finished goods and services produced within a country. 30.3 billion is thus the added value produced by T&R. This, of course, is considerably less than the 91.2 billion in spending mentioned above.

Of every euro a guest spends in the holiday accommodation sector, 18 cents goes to the central government.

Tourist traffic accounts for more than 7% of Dutch service exports (17 billion euros) and for 9% of Dutch service imports (20 billion euros)¹². In addition to a share of travel, the tourism-recreation sector also has a share in other important types of services in the Netherlands, such as transport services (passenger transport in shipping, aviation and other transport)¹².

Some of the money spent by tourists and holidaymakers ends up with the government in the form of tax revenue. For example, the government obtains revenue through specific tourism taxes³, taxes on income (such as payroll taxes and income taxes) and the purchase of goods and services¹³. It is not only tourists and

holidaymakers who provide tax revenue. People who move to a region because of employment opportunities also contribute to tax revenue through their living expenses.

Of the total international trade in services, travel was among the top five types of services in 2019.

~
At around EUR 30.3 billion, the T&R sector contributed as much to GDP as the construction, transport and warehousing sectors and almost twice as much as agriculture.

ZKA Leisure Consultants determined in 2019 that there are a total of 29 direct and indirect taxes for business owners in the leisure accommodation sector. Examples include payroll taxes, corporate taxes, environmental taxes, sewerage charges, pollution charges and pension charges. The burden of taxes and charges for the leisure accommodation sector averaged 30 percent for 2019. This means that for every euro a guest spends, at least 30 eurocents of this goes towards taxes, duties and unavoidable charges. The State is the main recipient of these taxes; approximately 18 eurocent (= 66%). Municipality tax is 20.3% and water authority tax is 3.3%¹⁴.

Overall, the sector accounted for 7.5% of the total number of jobs in the Netherlands in 2019.

~
“Tourism created new jobs when jobs with the Navy and Offshore companies declined.”

T&R can provide governments with beneficial economic value by preventing costs. In 2017, Ecorys and Kenniscentrum Sport investigated the socio-economic value of sport: sports and exercise improve people's physical and mental health. Sporters incur fewer healthcare costs due to a reduced risk of chronic conditions and their quality of life increases, as does life expectancy. Studies show that exercise and sports save an average present value of



Photo: Windmill route ©Dirk Brand

about 1,000 to 6,000 euros in healthcare costs, over a person's lifetime. In addition, sport has a positive impact on absenteeism. Participating in sports means that a person has an average of 25 to 50 fewer days off work, spread over 4 years. In total, over a person's lifetime, sports lead to savings of an average present value of approximately 10,000 to 30,000 euros in sick leave costs, corrected for sick leave due to injury^{15,16}.

³The Netherlands has four types of taxes of tourism: tourist tax, commuter tax, entertainment tax and the municipal levy on encroachments in, on or above public land¹⁰. How high these taxes are varies by municipality. In 2018, CBS recorded the receipt of 288 million in tourist tax and 33 million in commuter tax³. In 2019, 286 million euros of tourist tax was received (preliminary figure). Commuter tax amounted to 32 million euros (provisional figure). In 2020, before the corona pandemic, tourism tax revenue was budgeted³ at 411 million euros, an increase of almost 40% compared to 2018. It is not known how much municipal levy on encroachments in, on or above public land and entertainment duty was paid in the Netherlands.

T&R as employment engine

Economic value is also expressed in jobs. In the period 2010-2016, during which employment in the Netherlands increased only slightly, employment opportunities in the tourism-recreation sector increased markedly by 15.4%¹⁰. In 2019, the number of jobs grew to 813,000, an increase of 3.3% from 2018. Converted into full-time jobs (years of employment), these 498,000 jobs represented 6.4% years of employment for the Dutch economy¹¹. These new jobs create other new jobs that offset the decline in employment in certain sectors.

A few examples to further explain this value of T&R: business hospitality, such

as organising/facilitating trade shows, conventions, etc. provides employment for a large number of people in 'normal' times. In 2020, the projected revenue is 7.4 billion euros which amounts to 100,000 jobs.

These jobs are created not only at the venues where the events take place, but also at accommodation in the vicinity. The employment effects of business hospitality on the economy are significant, especially when the programme includes options to explore the region, such as by making use of hotels, restaurants and bars, cultural and natural heritage, recreational facilities and all kinds of public amenities. Museums employed a total of 14,697 persons in 2018, of which 9,434 were salaried employees. In the professional performing arts, 24,100 people were employed, of which 8,000 were salaried employees¹⁷. Sports facilities operators had 17,830 employees¹⁸

In addition to quantity, the sector also offers great diversity in terms of jobs. It offers work in a wide range of positions such as IT professionals, econometricians, online marketers, product developers and travel consultants¹⁹. The sector is also highly labour-intensive and provides a relatively high number of jobs for the low-skilled. Based on the most recent figures from CBS, low-income earners are overrepresented. The sector therefore fulfils an important social function. For the Netherlands as a whole, this group had an unemployment rate of 5.9% in the fourth

“Flevoland can still grow in terms of average education and income level. R&T offers these positions, such as those in marketing, hospitality and administrative professions.”

quarter of 2019, compared to 3.1% for those with secondary education and 2.2% for those with high level of education in the same period. As a result, the net employment rate for low-income earners is much lower than for the other two groups²⁰. A thriving hospitality sector is of considerable importance as an employment engine for the low-skilled. If that engine slows down or stalls, many of them will end up unemployed and on welfare²¹.

Most jobs in T&R are found in the four major cities. While the tourism areas in Brabant and North and Central Limburg also offer a lot of employment in the leisure sector in absolute terms, their share in the total economy is around average. The number of T&R jobs in the North Sea resorts is above average; the share of T&R jobs is 9.6%²².

97% of the respondents in the survey see job creation as a positive impact of T&R. Job creation is the clear leader in the top 25 societal values. See Table 5. It is notable, however, that in the survey only a single respondent filled in something regarding the role of their own organisation in generating jobs. As with revenue, a possible explanation is that organisations/companies see this as ‘self-evident’: because they exist, they provide employment. DMOs do specifically mention the role they see for themselves in generating employment for

the sector and the activities they undertake to that end, such as promotion, bringing together demand and supply in time and space, strengthening mutual networks and encouraging year-round visits.

Organisations and companies from all industries mentioned the qualitative aspects of generating jobs in the survey. The sector is ideally suited as a basis for work experience and advancement. The same applies to hotels, restaurants and bars. Many young people gain their first work experience there and benefit from this throughout their (working) lives.

“Particularly in places where job opportunities are not obvious, tourism can provide a way to make a career.”

~
“T&R often provides temporary workers with their first work experience.”

They acquire basic skills such as being on time, dealing with responsibilities and developing their social skills. This means that the hotels, restaurants and bars not only fulfil a social role as ‘living rooms of society’ but are also ‘learning experiences for society’. The survey shows that other branches of industry within T&R also play an important role as a learning environment for young people. See also Case description 2.

The impact of outbound travel on jobs is also positive. In 2016, around 40,000 jobs in the Netherlands were directly related to outbound travel. Of the jobs at Dutch airports and airlines, 50% and 67% respectively are directly related to Dutch passengers travelling abroad. In 2016, ABN AMRO estimated this to be about 25,000 employees⁸. Of course, outbound travel also contributes to employment abroad. The societal value of the sector and of tourism and recreation by Dutch people does not stop at national borders! We mentioned above

that the tour operators who participated in the survey referred to a source of revenue for a wide range of local partners and employees. The job opportunities on which this is based obviously also involve qualitative aspects, such as offering development opportunities (learning skills while working), training (commerce, languages, social skills, hospitality, hygiene, nature conservation) and career prospects (advancement to other or higher positions).

Table 5. Survey result ‘Employment’, ‘Opportunities for staff to learn skills’ and ‘Career prospects’

| Indicator | % Positive influence | % Negative influence | Position in Top 25 |
|---|----------------------|----------------------|--------------------|
| Jobs | 97% | 0% | 1 |
| Opportunities for staff to learn skills | 88% | 1% | 20 |
| Career prospects | 79% | 0% | 21 |

Case study 2: Advancement opportunities within T&R (multiple businesses)

In the case studies, several business owners mention young people who work their way up within T&R, for example from dishwasher to manager. Offering these opportunities has an encouraging effect, but the government sometimes underestimates the social value. It is therefore important that the government fund these opportunities, since training these people does not provide a conclusive business model. While businesses have extra options, on top of expense allowances they are also paying for supervision and all sorts of extra costs.

Showcase for other sectors

Some T&R businesses are creatively focused on bringing a specific branch of industry to the attention of the public. They continually make their customers/guests aware of the social issues at play within that industry. Explaining these issues in plain language helps to generate a large support base.

As a result, business owners hope that people will start to change the way they think and consume. In addition to creating a support base, business owners are also hoping to achieve further development of the branch of industry or the surroundings, whereby the surroundings can serve as a business climate or circular hub. Case study 3 shows how the TextielMuseum implements this.

Case study 3: Support for the sector (TextielMuseum)

The TextielMuseum in Tilburg is mindful of its social role as a museum and breeding ground. The museum works closely with a work placement company (formerly social employment) that arranges jobs for people with poor employment prospects. The main function of the museum is as a development location for the textile sector. The museum brings together international machine manufacturers, experts and creative makers/artists, as well as providing an opportunity for visitors to become familiar with this special sector.

In the Netherlands, there are not always sufficient funds for textile makers. They are struggling. The TextielMuseum is therefore really for these people. Every two years, the museum applies to the Mondriaan Incentive Fund for the purchase of a collection. During these two years, they ask artists to work for the TextielMuseum and then display the resulting artworks in the museum. In this way, the TextielMuseum represents craftsmanship: the maker/craftsman behind the work of art.

The museum also recently opened a design studio, where visitors can make their own socks or scarves. It hopes to attract a younger audience and this seems to be working out well. The average age of the visitors used to be 59 but now, with this studio, it is 36. The idea started in 2019 when the Museum won some prize money. It decided to do something for museum visitors with the money it won, under the slogan 'every visitor leaves here as a maker'. As a visitor to the museum, you get to experience the development and design process of a designer in the Lab. As a visitor, you become a maker and learn how complex this is: it also means that you will not be throwing away anything you created anytime soon because you made it yourself.

The museum also introduced the concept of the Rijksbus ('Meet the Makers'). Visitors can meet the makers and see what they are working on, such as a fashion show in Paris.

Both initiatives, the design study and Meet the Makers, connect the public, especially young people, with the sector. Rejuvenation within the sector is sorely needed and that is where the museum is making its contribution.

The textile industry is normally a closed industry, but the Museum is trying to change this. Visitors always leave with the feeling 'I've seen something that I've never seen before'.

Prelude to an attractive business climate

The sector boosts local economies²³. Large companies but also SMEs receive more visitors through T&R and this, as we saw above, creates revenue and jobs²⁴. This leads to increased spending by residents, resulting in an increase in consumer spending²⁵. The combination of increased spending by residents, the influx of visitors and the influx of workers due to employment in T&R, ensures that shops and other amenities can exist. In this way, new businesses are given more opportunities and more business developments are possible.

In the survey, 82% of the respondents recognise that the presence of tourist-recreational businesses has a positive impact on the business climate for business owners, and they identify the role they play in this. For example, DMOs and business hospitality make an important contribution to attracting business and talent by actively profiling their region as an attractive place for holidaymakers and business visitors to visit, live, work and do business. They specifically mention organising events, including business events, as an activity that contributes greatly to this. Tour operators mention that by transporting visitors to foreign regions and the liveliness and

trade this brings, they make an important contribution to the business climate of these regions, for both residents and new businesses. In the top 25, the influence of T&R on the business climate ranks 6th. See Table 6.

“Economic development through tourism is positive for the Walcheren region. The limiting factor, however, is having enough qualified staff.”

~

“By generating revenue from excursions, activities and small-scale local accommodation, the earnings remain with the local population instead of going to multinational companies.”

Several municipalities and regions are expecting a contraction in the number of inhabitants and households in the coming years. This contraction has consequences for the regional economy, the housing market, population-related activities and the labour market, among others²⁶. The T&R sector has the potential to create new dynamics in these kinds of regions. By providing livelihood for shops and facilities and attracting jobs, the development of the tourism and recreation sector can compensate for declining consumption in local markets²⁷ and provide new opportunities for businesses to generate sales.

Table 6. Survey result ‘Business climate of the region (for companies)’

| Indicator | % Positive influence | % Negative influence | Position in Top 25 |
|--|----------------------|----------------------|--------------------|
| Business climate of the region (for companies) | 82% | 2% | 6 |

Source of livelihood

Studies show that when tourism grows, including business tourism, so do the prices of related services and amenities²⁸. For example, convention facilities, attractions, hotels, restaurants and bars and supermarkets in a more touristy environment often charge higher prices and generate more revenue.

T&R can also contribute to the upturn of the housing market. In addition being temporary visitors, tourists are also potential residents. Discovering a region through tourism and recreation can lead to a decision to live there. In regions where there are many tourists and holidaymakers, there is often a strong demand for real estate. While this demand caters to the needs of the sector, including accommodation for workers, it is also due to the demand for real estate from tourists and holidaymakers who want to become residents.

“If tourists also shop in the region this makes it more beneficial for retailers to remain open in villages and the income of residents will increase as a result of T&R, making it easier to earn a living.”

~

Renting out an average home via Airbnb earned a private landlord an average of 3,400 euros per year in 2018.

In general, real estate prices rise when a tourist-recreational destination is in demand by tourists. For example, according to research by the Free University, house prices in Amsterdam rise by up to 25% in neighbourhoods popular with tourists²⁹. The increased demand and associated increase in value is positive for owners of real estate. They see the value of their real estate increase, allowing residents to sell their homes for more money. Owners of real estate can also rent out their homes at higher prices, leading to increased personal income. In addition to the usual overnight accommodation on offer, accommodation is increasingly being rented out by private individuals. The biggest player in this market is Airbnb. In 2018, there were 55,000

accommodations available on Airbnb in the Netherlands, with the average typical accommodation being rented

out for 33 nights per year. At that time, the revenue generated from a typical accommodation was 3,400 euros per year. In Amsterdam, this amount was even 4,300 euro³⁰. Private landlords benefit from this extra income, but they are not the only ones. Higher household income leads to more spending³¹. In turn, some of this spending ends up in other sectors.

Partly influencing the price increase of real estate is the proximity of tourist-recreational attractions. For example, it appears that proximity to fine arts and/or cultural historical museums is significantly linked to house prices³². Furthermore, one benefit of the increased demand for real estate is that it prevents vacancy. This is due to new residents being attracted, but also because, as mentioned earlier, tourist-recreational destinations have a larger support base for amenities.

The rise in prices also has a downside. The rise in prices of amenities, hotels, restaurants and bars, as well as supermarkets means that residents also face higher prices. In particular, the price increase of houses can be problematic for residents when buying or renting a starter home. In view of both the positive and the negative impact, the contribution made by tourism to the ability of residents to earn a living must be considered. When a larger increase in employment and income compensates for a price increase³³ then the ability to earn a living becomes easier.

In the survey, respondents often referred to the ‘general’ influence of the sector when talking about the influence of T&R on livelihoods. Implicitly, of course, the respondent’s own organisation plays a role in this. The general trend in the remarks by respondents is that T&R ensures that residents of tourist regions in the Netherlands as well as tourist regions outside the Netherlands where the Dutch holiday, have a better chance of finding work and income and are therefore better able to earn a living. This is then contrasted



Photo: Shoppen ©Limburg Marketing

with the price-increasing effect of T&R. The percentages reflect that people recognise the positive impact (41%) and negative impact (21%) of T&R on livelihoods. See Table 7.

Table 7. Survey result ‘Living expenses in the region are lower (negative: higher)’

| Indicator | % Positive influence | % Negative influence | Position in Top 25 |
|--|----------------------|----------------------|--------------------|
| Living expenses in the region are lower (negative: higher) | 41% | 21% | - |

Indirect effects: spinoff of the sector

T&R does not occur in isolation; it has an impact on many other sectors³⁴. This occurs in two ways. On one hand, tourists and holidaymakers use products supplied by many sectors, including non-typical tourism-recreation sectors. Think about a tourist visiting a supermarket. On the other hand, the tourism-recreation sector has many suppliers and some of the impact is felt by these suppliers. T&R therefore contributes to:

- Sectors that provide the technological and material basis for T&R, such as the construction sector
- Sectors providing infrastructural services, such as the road network, water supply, energy, etc.
- Retail and wholesale trade and transport

- The chain of food companies
- Light industry
- Related sectors, providing services of a general nature, such telephone, internet, laundry, hairdressing, etc.

Consider, for example, an event that attracts visitors from within and outside the region. These visitors have travelled to the event and this requires investments in infrastructure, such as roads³⁵.

Another example comes from the cycling platform Fietsplatform. According to Fietsplatform, in 2018 the Dutch spent a total of 629 million euros on bicycle day trips and 240 million euros on transportation to the starting point of the activity and parking. Over half (52%) of the spending during the bicycle day trip is on refreshments and 36% on shopping. In addition, holidaying cyclists spend about another 1.2 billion euros on

their hobby each year (2018). The majority (82%) of this spending is related to the purchase of new or second hand 'recreational' bicycles. Cyclists also spend considerable amounts on items such as water bottles, panniers and backpacks (93 million euros), cycling clothing and rain gear (65 million euros) and digital aids (30 million euros). All of these amounts flow into other sectors, entirely or in part³⁶.

As spending flows into these other sectors, it also creates employment. Three quarters of the volume of labour (FTEs) attributable to the tourism-recreation sector in 2018, which represents 791,000 jobs, can be attributed to tourism activities such as jobs in hotels, restaurants and bars, aviation, etc. However, more than a quarter of the total number of FTEs perform non-typical tourism activities, such as in the retail trade³⁷.

At national level, the exact size of the spin-off from T&R to other sectors is unknown. Regionally, however, there are calculations such as the economic value calculation of the Coastal Tourism Knowledge Centre. This shows how total spending in the T&R sector in the province of Zeeland flows into related

sectors and how many jobs this leads to. In 2018, for example, overnight tourism and day trips in the province of Zeeland generated an added value of almost 12 million euros and 114 jobs in the sector, as well as added value of 54.6 million euros and 937 jobs in trade³⁸.

In addition to Dutch people spending a total of 629 million on cycling day trips in 2018, recreational cyclists also spent around 1.2 billion on their hobby.

“A positive contribution at municipal level is the realisation of facilities for passers-by, such as those for motorhomes. This short stay has a positive effect on local spending, especially in shops and restaurants.”

In the survey, 95% of respondents recognised that T&R has a positive impact on supplier revenues. This value ranks 3rd in the top 25. See Table 8.

Table 8. Survey result ‘Revenue for suppliers’

| Indicator | % Positive influence | % Negative influence | Position in Top 25 |
|-----------------------|----------------------|----------------------|--------------------|
| Revenue for suppliers | 95% | 0% | 3 |

Cooperation and innovation

The sector also seeks out and contributes to *innovation*. T&R does not exist in isolation. As the previous section showed, many sectors are linked to it and, as the next section will show, there are close links to societal processes (both opportunities and challenges).

As a result, T&R is a connecting force almost by definition and many new and innovative initiatives arise from it. For instance, German agents provide assistance in the summer months at destinations in the Netherlands visited by many German tourists and Dutch agents provide assistance at German Christmas markets that are visited by many Dutch people³⁹. Or hospitality companies that put local products on the menu, contributing to the agricultural sector and sustainability. Less obvious are crossovers

with health, such as a festival focused on health or healthcare hotels⁴⁰. Another example is the Zeeland initiative of ‘holiday doctor’; a way to meet the demand of tourists, but at the same time a way to make doctors enthusiastic about practising in Zeeland permanently and thus counteracting the shortage of family doctors⁴¹.

“More visitors create more HBO/ MBO jobs and thus increase the need for regional education.”

“The healthier we are as a company, the more we can innovate and contribute to knowledge development: we do this by carrying out studies but also by setting up educational activities.”

A final example, from the Key Figures Amsterdam 2019: “Business meetings and conventions are important to Metropolitan Amsterdam. By working structurally on our reputation, we attract congresses and meetings that have added value for the city and region. Not only from an economic point of view, but especially because of the exchange of knowledge. In this way,

we are creating an active platform to link knowledge institutions, start-ups and companies to conferences and thus to the issues of the future.”

“Cooperation with schools, apprenticeships, internships and innovative companies.”

“Strong central network role for the entire region.”

“We give R&D assignments to makers.”

Given the wide diversity of companies surveyed, the methods of innovation and knowledge development also appear to be very diverse. Several companies mentioned the fact that they perform an important networking function or cooperate with other companies for innovation purposes. In addition, many respondents indicated that they actively provide workshops, training and education to encourage knowledge development and innovation. Situations such as the corona pandemic and budget cuts actively encourage out-of-the box thinking and creativity. Table 9 lists the scores.

Table 9. Survey result ‘Knowledge development and innovation’

| Indicator | % Positive influence | % Negative influence | Position in Top 25 |
|--------------------------------------|----------------------|----------------------|--------------------|
| Knowledge development and innovation | 75% | 1% | 17 |

Conclusion

Table 10 provides an overview of the top 25 societal values as rated by the survey participants. Not surprisingly, as discussed in this section, economic values score relatively high. T&R’s contribution to revenue from businesses, residents and government is widely recognised (no. 2 in the top 25). In 2019, the year before the corona pandemic, the economic impact of sector in the Netherlands was based on 91.2

billion in tourism-recreation spending. This includes spending by Dutch and foreign day trippers and overnight holidaymakers in the Netherlands, but also spending in the Netherlands by outbound tourists. This spending contributed 4.4% to Dutch GDP in 2019, significantly more than agriculture (almost 2x as much) and oil and gas extraction, and a share of employment (no. 1 in top 25) of 7.5% (813,000 jobs).

In addition to the absolute number of jobs, the sector also creates value through the diversity of jobs; diversity in terms of job roles and required education levels. Within the sector, people can learn new skills (no. 20) and lay a foundation for a further career (no. 21). Suppliers and their employees also benefit from T&R. Through the indirect effects, these suppliers generate revenue and employment (no. 3).

T&R is closely linked to other sectors. T&R can make a region less dependent on other sectors (no. 8), although literature and the sector also caution against too much dependence on T&R. Several tourist-recreational organisations/companies, such as the TextielMuseum, support a specific sector and bring it to the attention of the public. This can help create support for this sector, such as in the form of subsidies, changes in consumer behaviour, and create interest in working in that particular sector.

Table 10. Overview of scores from the survey in terms of T&R's contribution to societal values

| Indicator | Position in Top 25 | % Negative influence | Positive influence |
|--|--------------------|----------------------|--------------------|
| Jobs | 1 | 97% | 0% |
| Revenue for businesses, residents and government | 2 | 96% | 0% |
| Revenue for suppliers | 3 | 95% | 0% |
| Quality and quantity of hotels, restaurants and bars | 4 | 94% | 6% |
| Quality and quantity of recreational facilities (museums, amusement parks, etc.) | 5 | 91% | 2% |
| Business climate of the region (for companies) | 6 | 82% | 2% |
| Route networks for cycling, hiking, boating, etc. | 7 | 92% | 2% |
| T&R makes us less dependent on other sectors | 8 | 69% | 21% |
| Negative impact: Region too dependent on T&R | | | |
| Quality of cultural heritage | 9 | 87% | 3% |
| Special or trend-setting events | 10 | 85% | 2% |
| Local pride in the region | 11 | 92% | 5% |
| Quality of natural heritage | 12 | 68% | 25% |
| Encounters between people | 13 | 85% | 4% |
| Diversity | 14 | 71% | 7% |
| Inclusiveness | 15 | 73% | 4% |
| Quantity and quality of public services | 16 | 59% | 3% |
| Knowledge development and innovation | 17 | 75% | 1% |
| Education and jobs for people with fewer opportunities | 18 | 60% | 2% |
| Quality and quantity of retail trade | 19 | 83% | 7% |
| Opportunities for staff to learn skills | 20 | 88% | 1% |
| Career prospects | 21 | 79% | 0% |
| Social cohesion | 22 | 58% | 11% |
| Infrastructure and mobility | 23 | 68% | 15% |
| Quality of public spaces | 24 | 77% | 9% |
| Quality and quantity of public transport | 25 | 65% | 4% |

T&R can boost the local economy and contribute to the business climate (no. 6). More visits lead to more revenue, more employment and more spending. As a result, the threshold value of shops and other amenities is reached sooner and new businesses have more opportunities. This is particularly relevant to regions that are experiencing or will experience a population decline.

T&R has been shown to drive up prices, allowing businesses in a tourist region to achieve higher margins. Generally speaking, in the housing market real estate prices rise if a destination is in demand by tourists. This is positive for property owners. The downside, that both developments may

also mean that residents are faced with higher prices, is fully or partly offset by the fact that residents, through T&R, will have more opportunities for employment and revenue. T&R can therefore make a positive contribution to residents' ability to earn a living.

T&R's interconnectedness with other sectors and society requires cooperation with other sectors. This linking and the scope it provides for new ideas means that T&R can finally function as an innovative force (no. 17).



Photo: Castle Doorwerth ©Jurjen Drenth in conjunction with Visit Veluwe



Photo: De Dakkas © Haarlem Marketing

The societal value of Tourism and Recreation

The societal value of T&R goes far beyond economic value alone. In this section, we look at societal value and its various elements. This includes, on one hand, the value of participating in T&R itself, and T&R as a source of happiness, relaxation, education and comfort, among others. On the other hand, it is about the value perceived by residents of T&R for the living environment, such as the range of recreational activities, shopping options, public spaces, public amenities and infrastructure, preservation of cultural and natural heritage and safety, as well as with regard to social processes such as pride and identity, interaction between residents and visitors/business owners and inclusion, diversity and social cohesion.

It is important to realise that there are no hard boundaries between the various elements. On the contrary, they are closely related. For example, the presence of recreational activities in their living environment enables people to participate in T&R themselves, which in turn contributes to pride and identity. The various elements are therefore mainly intended to provide structure to the discussion.

Tourism and recreation as a source of happiness and comfort

Participating in T&R is of immense value. The relationship between well-being and leisure time has been widely studied and proven⁴². Participation in active or passive leisure activities contributes demonstrably to quality of life⁴³. The word recreation is derived from the Latin 'recreate', which literally means 'to recreate', but which can also mean 'to revive'. Holidays and free time are labour rights and have become self-evident. Going on holiday is the norm⁴⁴. At the end of the 1980s, the German sociologist Opaschowski observed: "Freizeit ist zum Lebensideal geworden"⁴⁵.

"Recreation literally means recreating and that is exactly what we need in these special and busy times. Leisure is important, educational, social and healthy for everyone."

One of the basic concepts here is 'happiness'. In addition to happiness and the financial situation, health and work, there is also a strong correlation between happiness and leisure time⁴⁶. Holidaymakers generally feel better during their holidays, compared to their daily lives⁴⁷. This is perhaps not surprising when we consider the value of participating in T&R: it improves our psychological well-being, our health and encourages connection with others. First, the sector contributes to psychological well-being. Fun and relaxation are key, which can lead to a decrease in stress. You also see that T&R provides scope for reflection. This may include yoga retreats, but sailing⁴⁸ or visiting a museum³² fulfil a similar role. Travel invites wonder⁴⁹; the pyramids in Egypt, the moon landscape in Namibia, World Chocolate Wonderland, but also that cosy square in a Dutch village, a visit to the Efteling or the discovery or rediscovery of one's own living environment. This sense of amazement results in psychological growth; it keeps our minds limber. It has been shown that the more active one is on holiday, the more happiness one derives⁵⁰. Exercise is obviously healthy. Think of sports

like surfing or golf, but also hiking in all its simplicity. In addition, for many tourists and holidaymakers, outings also mean connecting with others. People often take part in recreation together with a partner or friends and they also come into contact with new people. According to Opaschowski (2004), recreation fulfils a basic need for contact and sociability. The sociologist also cites integration as a reason for recreation; it satisfies the need for emotional security, love, social bonding and a sense of being part of a community⁵¹. This may involve going to a restaurant together, but there are also indications that active cultural participation has great social value for the integration and social cohesion in a region⁵². This also applies to recreation in nature. Studies on the use of green and blue space highlighted social interaction as the main benefit⁵³.

"Travel broadens your view and removes your blinders."

~
"Hotels, restaurants and bars facilitate social interaction. This need is embedded in human genes. As a result, hotels, restaurants and bars contribute substantially to people's happiness."

In addition, recreational users and tourists are often satisfied with their spending; money spent on experiences leads to more satisfaction than money spent on material goods⁵⁴. The positive feeling lingers; the experience leads indirectly to daily happiness, such as through memories that are relived through photos or other mementos⁵⁵. Finally, many people describe the benefits of T&R in terms of comfort. Eating out as comfort⁵⁶, traveling as comfort⁵⁷. There is no hard and fast evidence for this, but comfort is welcome at this time.

Table 11. What do customers look for in the tourist-recreational sector

| | Total | Museum, open monument | Travel agency | Hotels, restaurants and bars | National Tourism Organisation (NTO)/Destination Marketing Organisation (DMO) | Cultural institutions | Water sports/round trips/marina/outdoor sports | Attractions | Camping/bungalow park | Event/festival organiser | Other/miscellaneous |
|------------------------------------|-------|-----------------------|---------------|------------------------------|--|-----------------------|--|-------------|-----------------------|--------------------------|---------------------|
| <i>Share of type organisation:</i> | | 34% | 21% | 17% | 8% | 4% | 4% | 3% | 2% | 1% | 6% |
| Relaxation | 88% | 97% | 83% | 95% | 74% | 88% | 89% | 100% | 100% | 100% | 38% |
| Fun | 75% | 78% | 75% | 77% | 74% | 63% | 89% | 83% | 100% | 100% | 38% |
| Inspiration | 61% | 75% | 71% | 33% | 74% | 75% | 33% | 67% | 0% | 67% | 31% |
| Social contact with others | 54% | 53% | 63% | 64% | 26% | 63% | 67% | 50% | 0% | 100% | 38% |
| Reflection/food for thought | 42% | 70% | 25% | 18% | 42% | 88% | 11% | 50% | 20% | 33% | 15% |
| Exercise | 29% | 10% | 56% | 23% | 26% | 0% | 78% | 33% | 60% | 100% | 23% |
| Energy | 29% | 17% | 48% | 31% | 42% | 0% | 22% | 33% | 60% | 67% | 15% |
| A place to work | 18% | 19% | 8% | 36% | 11% | 25% | 11% | 0% | 20% | 33% | 15% |
| Fitness/health | 17% | 4% | 35% | 13% | 21% | 0% | 44% | 0% | 60% | 33% | 8% |
| New products | 15% | 8% | 21% | 13% | 11% | 38% | 33% | 17% | 0% | 33% | 23% |
| New business contacts | 12% | 8% | 6% | 21% | 32% | 13% | 0% | 17% | 0% | 33% | 8% |
| Support | 9% | 8% | 8% | 18% | 16% | 0% | 0% | 0% | 0% | 0% | 8% |
| Not applicable | 4% | 0% | 0% | 5% | 11% | 0% | 11% | 0% | 0% | 0% | 38% |
| Other, specifically ... | 17% | 16% | 21% | 8% | 5% | 25% | 22% | 17% | 20% | 33% | 38% |

Table 11 shows what the companies/organisations that participated in the survey consider that their customers/visitors are looking for. Many of the concepts mentioned above recur. The top five, for all industries combined (see 1st column), are relaxation, fun, inspiration, social contact and reflection. The columns show the percentages for the different types of organisations/companies that participated

in the survey. The percentages with the red shading are significantly lower than the overall scores. The green shading indicates which percentages are significantly higher. Case study 4 shows how Watersport Camping in Heeg tries to contribute to relaxation, inspiration and social contacts and how Hotel Pincoffs lets people enjoy themselves even in these turbulent times.

Case study 4: Conscious commitment to enjoyment (Watersport Camping and Hotel Pincoffs)

Social improvement is very important for Watersport Camping in Heeg, Friesland. As a result, there are many sustainable, green initiatives on the campsite, as well as creative cultural projects. Watersport Camping is a WIFI-free park to order to encourage people to get out of their comfort zone and socialise. Living in the here and now, hearing birds, feeling the wind, etc. add to the experience and provide relaxation and inspiration.

Hotel Pincoffs in Rotterdam is a hotel that is closely connected to its surroundings. During the corona pandemic, the hotel relied heavily on Dutch visitors and particularly those from Rotterdam. It recently developed the concept of 'in room dining', in which the rooms are small restaurants. A Rotterdam company rented the hotel in order to experience this concept. This allowed them to confer/meet at a safe distance. Hotel Pincoffs is now very much embracing this kind of initiative in order to let Rotterdammers enjoy themselves.

Residents experience the benefits of T&R for the living environment

T&R is often very visible, as it largely takes place in the living environment of the inhabitants of a region⁵⁸. This brings us directly to the reciprocal relationship between the sector and its surroundings¹⁰. Since the living environment is part of the 'product', it is simultaneously affected by the positive and negative impact of T&R.

Social impacts are generally difficult to quantify and measure^{59 60}. The majority of studies on the social impact therefore interpret this impact from the perspective of residents. This means that the issue here is not the actual impact, but the perception⁶¹. Studies like this show that residents overwhelmingly support the development of T&R and acknowledge and recognise its value.

A survey among residents in Friesland shows that 58% of residents think the number of tourists coming to Friesland is 'fine'. Only 6% think there are too many tourists. This

compares to 22% of residents who would like to see more tourists. The same survey shows that 55% of residents believe that tourism has more advantages than disadvantages. Furthermore, 30% think that the advantages and disadvantages are in balance. There is a connection with crowds of tourists; when respondents indicate that there are many tourists visiting their hometown, they are more likely to see the benefits⁶². A survey among residents about tourism was also carried out in Limburg. There, 39% of residents agreed with the statement that 'tourist developments improve the quality of life in their municipality'. A further 39% were neutral⁶³.

While residents see the advantages, this does not mean they turn a blind eye to the disadvantages⁶⁴. The impact on liveability does not have to be all positive⁶⁵. As the survey of residents showed, residents weigh the pros and cons against each other.

Literature refers to 'social exchange theory'^{66 67 68}. There is considerable evidence that when local people experience considerable economic benefits then they have a positive attitude, despite any potential negative social effects⁶⁹. Yet, reality is more stubborn than 'dismissing the disadvantages because there are positive effects'. In the aforementioned survey in Limburg, not all regions were equally positive about tourism. In Valkenburg aan de Geul, where tourist pressure is high, 4 out of 10 respondents felt that tourism decreased the quality of life, although they recognised the economic benefits⁶³.

An imbalance between carrying capacity and tourist pressure can lead to problems. When carrying capacity and tourist pressures are monitored, changes can be signalled and adjustments can be made.

Recreational activities improve the quality of life of residents

Closely related to the 'value of participation in T&R' discussed above, is that T&R contributes directly to the quantity and quality of the range of recreational activities in the living environment of residents^{72 73 74 75}. The opportunity this provides for residents, close to where they live, to make use of this range of activities makes a positive contribution to their quality of life⁴³, their appreciation of their own living environment^{10 76} and the support for the sector by residents⁷⁶.

In fact, many business owners in T&R also offer their services and products to residents. In many cases, regular customers are residents. For example, hotels, restaurants and bars, golf courses, amusement parks, museums, art galleries, walking and cycling routes, festivals, indoor playgrounds, swimming beaches and events⁷⁷.

Nowadays, this type of survey among residents is regularly included in the development of a tourism policy in order to create a better balance between residents, visitors, business owners and the living environment⁷⁰. The social impact of tourism also depends on the carrying capacity of the region. If tourist pressure, which is a combination of visitor intensity, visitor density and visitor behaviour, exceeds the carrying capacity, which is the ability of a destination to receive visitors without negative effects, then problems arise¹⁰. It is now known that an imbalance between carrying capacity and tourist pressure can lead to problems. By monitoring carrying capacity and tourist pressure, changes can be detected and adjusted⁷¹.

In order to achieve a range of recreational activities that residents appreciate, in addition to quantity and quality, diversity is also essential. In an analysis of the structure of services on Texel, business owners said they regretted that the hotels, restaurants and bars had begun to resemble one another. Now the owners of hotels, restaurants and bars consciously strive for innovation and focus on different target groups⁷⁸. Municipal policy and planning based on a development framework can support the sector in creating and continuing to create these benefits. For example, the Utrecht Hotel Development Framework 2018 states that selective growth of hotels, restaurants and bars is possible, but plans must be tested for future-proofing of the living, working and business environment.

"Tourism and tourist facilities make major events possible, such as Sail, West Frisian Market, traditional ship fair, etc."

~

"Tourists ensure the economic operation of [tourist and recreational] facilities, which otherwise not exist."

This means that daytime catering that responds to trends and creates connections between residents will have more opportunities than fast food facilities, for example⁷⁹. For example, a wine shop that wants to put on a tasting would be an option.

“Tourists ensure that there is a wide range of hotels, restaurants and bars and this adds value to the city, which also benefits the local residents.”

~

“Because of the competition, you see that each company maintains its own standards of quality.”

Table 12 shows that 94% of the respondents recognise the positive influence of T&R on the quantity and quality of the hotels, restaurants and bars. For hotels, restaurants and bars, the common thread in the responses is that more visitors means more hotels, restaurants and bars (quantity) and that the increase in competition within the hospitality sector (more supply) means that there is a need for each business to provide the best possible quality. ‘More tourists means more choice and more competition, so you do your best’. This applies in the Dutch context, but of course also to the foreign regions where Dutch people go on holiday. Depending on the regions involved, tourism to these regions can make an important contribution to raising the quality of hotels, restaurants and bars, including hygiene and attention to healthy eating.

“We identify the wishes of visitors and give input to governments for the development of route networks.”

91% of respondents recognise that the sector contributes to recreational facilities. For example, it is mentioned that supply cannot exist without demand, and that visitors therefore play an essential role in maintaining the supply from which residents also benefit.

Many of the respondents also see the value of T&R in creating route networks. Route networks have an important function in providing a healthy and attractive environment to residents⁸⁰. The

importance of the route networks and the active contribution of the organisations interviewed is clearly evident in the responses. Terms such as ‘contribution, maintain, develop or self-develop’ frequently recur in the description of the role of the organisation.

“If a region has more to offer in the form of museums and the like, it also becomes an attractive region for national and international conferences (from which museums also benefit). This creates a reciprocal action.”

Regarding the value of T&R for events, as endorsed by 85% of the respondents, they indicate that, on the one hand, the presence of tourists and holidaymakers and the associated amenities makes a region attractive for hosting events, including business events, and that, on the other hand, events, including business events, in turn contribute to the attractiveness of the region for visitors, residents and business owners. This means that the support, organisation and profile of such events, both by the DMOs and the organisations active within corporate hospitality, plays an essential role in realising this societal value.

Table 12. Survey results mention ‘Quality and quantity of hotels, restaurants and bars’, ‘Quality and quantity of recreational facilities (museums, amusement parks, etc.)’, ‘Route networks for cycling, hiking, boating, etc.’ and ‘Special or trend-setting events’

| Indicator | % Positive influence | % Negative influence | Position in Top 25 |
|--|----------------------|----------------------|--------------------|
| Quality and quantity of hotels, restaurants and bars | 94% | 6% | 4 |
| Quality and quantity of recreational facilities (museums, amusement parks, etc.) | 91% | 2% | 5 |
| Route networks for cycling, hiking, boating, etc. | 92% | 2% | 7 |
| Special or trend-setting events | 85% | 2% | 10 |

Opportunities for shops

In addition to the recreational range of activities, the retail mix also benefits from tourism. While the retail mix does not equate to liveability, residents can enjoy a diverse quality range and the disappearance of shops detracts from liveability (see Case study 6). In Zeeland, for example, there are supermarkets in villages where a supermarket could not survive without tourism. When comparing the number of supermarkets with the number of inhabitants, the relationship with tourism seems clear:

“Without tourism there would be only one supermarket and hardly any retail trade.”

“Where many people congregate, the likelihood of doing business increases. This does not always mean that they are of good quality. There should be less Nutella and tourist shops in the city centre. The range must be broad so that we can also continue to serve our fellow-city residents.”

Wadden Islands, the Zeeland coastal communities of Veere, Sluis, Noord-Beveland and Schouwen-Duiveland, and Vaals in the Limburg Hills⁸¹. Respondents to a survey on the attitudes of residents in the province of Zeeland concur with this positive influence. the top 10 municipalities

with the most supermarkets per inhabitant are the ones where 7 out of 10 respondents agree with the statement that there are more shops and hotels, restaurants and bars thanks to tourism.

However, there is an important caveat here; the impact depends on the development stage of the destination⁸² and the carrying capacity of the destination. When there are too many visitors or the visitors do not match the existing range of activities, there is a high chance of over-exploitation. Such as the one-sided range of cheese and souvenir shops in the centre of Amsterdam. At the municipal level, this can be controlled through zoning plans and retaining control of real estate⁸³.

The survey shows that 83% consider that T&R has a positive impact on the quality and quantity of the retail trade. See Table 13. 7% of people see a negative impact. The remarks show that the main issue here is the abovementioned problem of a range of activities that is too one-sided.

Case study 5 describes the design and results of a Zeeland survey on the relationship between tourism intensity and the level of amenities, and more specifically the number of restaurants and the number of supermarkets.

Table 13. Survey result ‘Quality and quantity of retail trade’

| Indicator | % Positive influence | % Negative influence | Position in Top 25 |
|--------------------------------------|----------------------|----------------------|--------------------|
| Quality and quantity of retail trade | 83% | 7% | 19 |

Case study 5: Public relations tourism - level of facilities in Zeeland (HZ Coastal Tourism Knowledge Centre)

In 2020, HZ Coastal Tourism Knowledge Centre conducted research based on desk research and open data into the actual observable impact of tourism on the quality of life in Zeeland. To determine the extent to which tourism may contribute to the liveability of Zeeland as a tourist destination, the researchers first determined how to objectively measure concepts of 'tourism' and 'liveability'.

To objectify the concept of tourism, they used existing insights into the tourism pressure of the thirteen Zeeland municipalities, expressed as 'tourism intensity' per municipality (number of tourist nights per 1,000 inhabitants per municipality in 2018).

They used the Liveability Index (Leefbaarometer 2.0) to interpret the concept of liveability and to describe the liveability situation for each municipality in Zeeland. This instrument makes it possible to monitor liveability on the basis of one hundred objective indicators. These indicators are divided into five aspects, specifically: 'housing', 'residents', 'facilities', 'safety' and 'physical environment'.

The liveability situation (in 2018), expressed in a liveability score, differs from municipality to municipality. The municipality of Veere, the municipality in Zeeland with the highest tourist pressure, has the highest liveability score and the municipality of Terneuzen, the municipality in Zeeland with the lowest tourist pressure, has the lowest liveability score. Focusing on the aforementioned underlying scores makes it clear that the differences in the liveability scores of the Zeeland municipalities are mainly caused by the score for 'amenities' per municipality.

Because there was no relevant open data available for the underlying indicators of the 'amenities' score, the researchers themselves selected (as a prelude to the formulation of hypotheses) four related indicators, namely 'number of restaurants per 1,000 inhabitants', 'number of supermarkets per 1,000 inhabitants', 'number of general practitioners per 1,000 inhabitants' and 'number of ATMs per 1,000 inhabitants'. The numbers for each indicator found were then determined for each municipality by Open StreetMap counts.

After testing the hypotheses (there are relatively more 'restaurants' / 'supermarkets' / 'general practitioners' / 'ATMs' in the Zeeland municipalities with higher tourism intensity than in Zeeland municipalities with lower tourism intensity) through linear regression, the researchers established two (linear) relationships, namely the relationship between tourism (tourism intensity) and the number of restaurants per 1,000 inhabitants ($R^2 = 0.86$) and between tourism (tourism intensity) and the number of supermarkets per 1,000 inhabitants ($R^2 = 0.82$).

The thirteen Zeeland municipalities is still too limited to make a definitive statement about the alleged relationships. Another caveat to the research is that a higher tourist pressure and therefore more restaurants or supermarkets per 1,000 inhabitants does not directly lead to a higher score for 'amenities' and therefore the total liveability score per municipality.

This is because, on the one hand, the effect of a single indicator is not strong enough to substantially increase or decrease a dimension score and, on the other hand, a study of

the background to the Liveability Index 2.0 showed that while the ‘disappearance of a supermarket’ can have a significant adverse impact on the dimension score ‘amenities’, an additional supermarket does not necessarily lead to a higher dimension score for amenities’.

However, it can be deduced from the above that the indicator ‘number of restaurants per 1,000 inhabitants’ in principle contributes positively to the score for the amenities dimension. Tourism can therefore also make a positive contribution to the liveability score of a municipality, provided that we take into account that there are also numerous other indicators that exert an influence (in conjunction).

Raison d’être of our cultural heritage

T&R and our *cultural heritage* are closely linked. Museums are perhaps the most obvious example of this. They are important attractions for destinations, but museums also need visitors, as this gives them their *raison d’être* (support and entrance fees).

“Tourists contribute to maintenance to preserve heritage through entrance fees.”

~

“Tourists’ interest in heritage leads to heritage conservation.”

An example from abroad: Tourism in Malta is essential to the survival and maintenance of Malta’s cultural heritage. In 2018, Heritage Malta (the national cultural heritage institution) received 1.9 million visitors at its 28 sites, generating 8.83 million euros from ticket sales and 858,823 euros from gift stores. These revenues were used to preserve and restore the Grandmaster’s Palace (Valetta 84). Closer to home, visitors also contribute to the preservation of cultural activities. The Railway Museum (Spoorwegmuseum) in Utrecht acknowledges that it has the large number of visitors it receives to thank for the content of its exhibitions, such as ‘The Children of Versteeg’ about the railway in WWII⁸⁵.

This extends beyond museums; local arts and crafts can be used for souvenirs and decoration, such as in hotels, restaurants and bars. Souvenirs do not necessarily have to be cheap and ‘*made in China*’. There are

examples of watercolours, jewellery, and pottery where the knife cuts both ways; visitors are happy with the availability and arts and crafts are happy with the demand⁸⁶. Tourism can help preserve some cultural activities, such as traditional art forms^{87,88}. A Dutch example of this is smoking herring⁸⁹. In addition, visitor interest can increase the support base for investment in cultural heritage⁹⁰. This is not insignificant, because maintaining and making buildings suitable for contemporary use is very expensive. Cultural heritage and ‘places with a history’ promote a certain ‘*sense of place*’; that residents feel connected to their place and their region⁹¹. Residents appreciate projects

“Heritage is about and connects with the past. It provides information about where we come from and gives newcomers a picture of where they have ended up.”

~

“Benefit: more visitors and revenue lead to more investment. Disadvantage: significant pressure on heritage, pollution, maintenance and the risk of touristification.”

and investments in cultural heritage for touristic and recreational use, provided this takes place in an appropriate manner^{92,93,94}. Therefore, the local context must be taken into consideration during development. The government can play a role in this by involving residents in policy and linking governance and obligations to new development plans (see also Appendix 1).

Many survey respondents (87%) see the impact of T&R on cultural heritage as positive. The explanations emphasise the role that visitors/tourists, and their spending, play in heritage conservation.

Yet respondents also pointed to the downside: visitors can create significant pressure on heritage, pollution and maintenance costs. See Table 14.

Table 14. Survey result ‘Quality of cultural heritage’

| Indicator | % Positive influence | % Negative influence | Position in Top 25 |
|------------------------------|----------------------|----------------------|--------------------|
| Quality of cultural heritage | 87% | 3% | 9 |

Nature as the most important asset

T&R also affects *natural heritage*. It is very important for businesses in T&R to protect nature, after all it is part of their livelihood. ‘Being outdoors’ and ‘parks’ are essential to their range of activities⁹⁵. At the Efteling, the preservation of nature is clearly visible; it only builds on 11% of its total surface area⁹⁶. But the natural landscape is also important for golf courses, as it is part of the sport itself. In the Netherlands, green policies and the merging of the natural landscape into the courses have been an important element of golf course management for years⁹⁷. At destination level, too, there is a growing awareness that tourism is dependent on nature. For example, Jouke van Dijk, Professor of Regional Labour Market Analysis, emphasises that if Groningen wants to use tourism as an economic opportunity then it will need to take care of the landscape and nature, because this is its most important asset²³. This interest extends beyond the industry itself. For example, a link has been demonstrated between the perceived effects of tourism on the environment and people’s well-being. When residents are aware of the negative effects, a study by Kim, Uysel, and Sirgy actually showed a decrease in those residents’ sense of safety and health³³.

Despite the association of tourism with a negative impact on the environment, tourism and nature do not necessarily have to get in each other’s way. For example, the sector recognises that tourism causes

climate change and that climate change affects them directly. UNWTO estimates that travel is responsible for five percent of total global CO₂ emissions⁹⁸.

“We provide information on the importance of nature and educate people on how to interact with nature and their own environment.”

~

“Travelers can influence lobbying for improvements to nature.”

~

“Thanks to T&R, more work is being done to improve the natural parks and more money is available.”

What is the sector itself doing to counteract this? Companies are looking for carbon-free or low-carbon solutions, such as innovation, behavioural change and operational efficiency⁸⁴. In the Netherlands, for example, you see that many travel specialists (VVKR) use CO₂ compensation⁹⁹. Case study 6 shows that individuals and companies cannot do this alone, and that the government has an important role to play in limiting CO₂ emissions. In addition, companies are focusing on energy and water conservation and are seriously implementing waste management⁸⁴. The circular construction of beach huts¹⁰⁰ or recreational homes¹⁰¹ is a good example. What is also striking is that the sector is looking for broad cooperation, such as the joint initiative #hiermoetjelij (this is the place to be)¹⁰². In addition to restoring the visitor economy after the corona pandemic, the initiative wants to show the Dutch what the Netherlands has to offer, and thus focus on sustainability.

Case study 6: Piquing traveller awareness (Better Places)

Better Places is a Dutch travel company that offers travel in a more sustainable, fairer and inclusive way. It is hoped that people will think more carefully when they book a long-distant trip, but the travel company also indicates that a price incentive can contribute to this. The government must tax CO₂ emissions to ensure that it is not possible to fly to Barcelona for 30 euros. Also from the point of view of businesses, it is essential that something be done about this.

Governments can support all this with a nature policy. Such as a financial incentive to make tourist-recreational businesses more sustainable. But an urban nature policy can also contribute¹⁰³. Some municipalities take measures to reduce car traffic. Utrecht, for example, has a strict environmental zone. Partly on this basis, the city was declared the most sustainable municipality by Nature & Environment¹⁰⁴. Schemes for sharing bikes and electric scooters can also be effective measures. In Antwerp, shared bicycles are a success, partly due to the density¹⁰⁵¹⁰⁶. In Amsterdam, too, there will be a new experiment with a shared bicycle/scooter scheme, this time with new rules to combat nuisance¹⁰⁷. In addition, a municipality can help by promoting car-free alternatives, such as walking, cycling, car sharing¹⁰⁸ and public transport¹⁰³.

As with cultural heritage, revenue derived from T&R can also contribute significantly to nature itself. One example is wildlife tourism; this type of tourism contributes to the survival of these wild animals⁸⁴. For example, due to the corona pandemic, many countries such as Botswana¹⁰⁹, Cambodia¹¹⁰, Kenya¹¹¹ and the Congo¹¹² experienced a sharp increase in poaching for meat and ivory due to the lack of income from tourism. In the Netherlands, too, there is an interaction between wildlife and tourism; on the Veluwe, wisent (European bison) have been introduced in collaboration with Rewilding Europe¹¹³. They can only be visited via a guided excursion¹¹⁴.

There is one final positive effect of T&R on nature: It can lead to a greater awareness of the importance of nature¹¹⁵. For instance, recreation has an important place in the structure of the Nature Network of the

Netherlands (formerly the Ecological Main Structure (Ecologische Hoofdstructuur)¹¹⁶. Experiencing nature creates support for the preservation of that same nature.

In the survey, 68% of respondents consider that T&R has a positive impact on the quality of nature, water or the landscape. On the other hand, 25% reported experiencing a negative impact. The explanations are diverse.

“In regions where tourism is increasing, more attention is usually paid to nature conservation: hunting whales has been replaced by whale watching, nature parks have replaced mining, etc.”

~

“Suriname is still earning too much money from gold, oil and logging, [...]. We try to encourage tourism so that awareness of nature conservation increases.”

Some respondents say they do not play an active role, in part because other actors such as municipalities, foundation and the National Forest Service in the Netherlands (Staatsbosbeheer) focus on the quality of nature, water or the landscape. Others clearly indicate how they actively play a role in this issue. For example, through visitor distribution, donations, marketing, pressure measurement, zoning /routing and providing information. The downside is expressed in the following quotes: ‘Leaves a mess behind’, ‘Tourism consumes a lot of water’, ‘More visitors and income leads to more investments, but increased pressure on nature, pollution and maintenance’. Case study 7 shows how various business owners relate to their natural environment and give shape to their own role.

Table 15. Survey result ‘Quality of nature, water or landscape’

| Indicator | % Positive influence | % Negative influence | Position in Top 25 |
|---------------------------------------|----------------------|----------------------|--------------------|
| Quality of nature, water or landscape | 68% | 25% | 12 |

Case study 7: Contribute to the natural environment (Suzie’s Farm, RAI, TextielMuseum and Hotel Pincoffs)

Farm, Food, Fun are the key words of Suzie’s Farm. It offers a total farm experience that includes products from its farm as well as activities. In this way, Suzie’s Farm tries to showcase farmers. The concept of Suzie’s Farm is a total concept that is new to the Netherlands. Suzie’s Farm brings together local produce, farm knowledge, experience, education and a shop under one roof.

The local council thinks the overall concept is fantastic and it fits in with the national food vision where you can link all kinds of social organisations. However, it is important that a municipality also dares to stick its neck out. In fact, it was difficult for Suzie’s Farm to establish a shop next to its farm business within the existing zoning plan. The municipality considered it impossible as the land was not zoned for this purpose, but it did consider it possible in the centre of the village. Obviously, for a total concept, it is not desirable to refer visitors to the shop in the village after visiting Suzie’s Farm. A total concept needs to exist as one whole and not in individual parts. The municipality could help with this by thinking along with business owners.

According to Suzie’s Farm, farmers are in a tight spot because of the current free trade policy. Our land and how we produce is too expensive compared to other countries in the world. In the past, we could cope with this through economies of scale. Currently we have all these social issues and are unable to scale up, or at least the average farmer cannot. In order to take action on these social issues, farmers must become efficient and super high-tech. The question is whether we want this because it also means that the landscape will change completely. In the Achterhoek, for example, it would mean that the entire family landscape would disappear. It is up to the government to decide what the landscape and how we live will look like. The government needs to provide clarity and implement policies to protect certain ways of farming or certain social values. This is not being done at the moment. In short, clarity and long-term vision are especially lacking so that farmers do not know where they stand.

In Switzerland they have a vision of moving away from free trade in order to protect farmers, but the government then expects them to farm in a certain way. The farmers in Switzerland have therefore been assigned a very different value: a social value. For half of the year farmers are now earning their income from tourism. This is encouraged by the government, which ensures that farmers have a much larger social function than just producing food. In the Netherlands, the government could encourage this and expect an element of entrepreneurship from the farmer. It could also facilitate this by allowing farmers some discretion, so that farmers can facilitate T&R as well as farm production. This is already happening but varies very much from one municipality to another.

Several organisations/companies we spoke to in connection with the case studies, are working towards contributing in a positive way to the development and diversity of the surroundings. For example, the RAI Amsterdam and the TextielMuseum in Tilburg are currently in talks with the municipality to make their immediate surroundings more diverse or greener. Hotel Pincoffs in Rotterdam has also been focusing on this and, in consultation with local residents, has turned a section of a building next to a road into a green space. This initiative is in keeping with the policy of Hotel Pincoffs. It does take some time to realise something like this, and this length of time is mainly due to organisational and legal aspects of the municipality.

Without tourism, there is no doctor, no bus, and no proper maintenance

A survey by World Tourism Organization, a United Nations specialized agency (UNWTO) found that 72% of residents in several countries believe that tourism has a positive impact on public facilities and infrastructure. Tourism is a way to create investment and support for new public facilities. Consider public transportation, health care, police and the road network. On the other hand, visitors can also exert more pressure on these facilities⁶⁸. Consider traffic jams or higher costs for maintaining the road network. It is clear that attention must be paid to the balance. For example, the ANWB conducts research into local interests such as accessibility and road safety, but at the same time searches for space to realise infrastructure for T&R.

“Our area is characterised by small population centres. Without tourism, there would be no family doctors, no volunteer fire departments, no ATM machines, etc.”

Governments also need to include visitors in the planning and budgeting of public facilities¹¹⁷.

When planning for mobility incorporates both social and sustainable components, mobility of tourists can enhance the mobility of residents. For example, because

bus 391 between Amsterdam Central Station and the Zaanse Schans was promoted as a tourist line, there were suddenly many more users and this bus could also run more frequently. It therefore became an attractive option for commuters¹⁰. In places where tourist mobility gets in the way of the mobility of residents, governments can consciously seek this kind of synergy between the interests of tourists and the interests of residents, and can develop ‘soft’ mobility options such as cycling and walking paths and the use of SMART solutions; think of sensors that control access to a historic centre, web portals to share mobility data

“More tourism requires more infrastructure. You need to expand and improve as things get busier. However, mass tourism can also have a negative effect, if it creates traffic congestion.”

~

“The presence of the museum is all the more reason to have a good public transport connection with cities in the vicinity.”

~

“The regional bus is made possible in our municipality partly because there are so many tourists.”

and GPS systems that direct visitor flows¹⁰³. Overall, research shows that residents recognise that T&R contributes to the availability of amenities that positively affect their quality of life^{118 119}.

Residents also agree that tourism contributes to the image of their city, village or region^{120 121 122} and researchers see a link between the quality of the built environment and the arrival of visitors in that same environment: visitors lead to more investments in public spaces and streets are given a boost^{123 124}. According to The Hague’s tourism strategy, a quality shift has been made there in recent years. The renovation of the Pier at Scheveningen and the Kurhaus will contribute to the quality of the outdoor space. The ‘Sculptures by the Sea’ on the boulevard are specifically mentioned¹²⁵. The redevelopment of the Boulevard of Schagen in Domburg was even nominated for the ‘Award for Best Public Space’ in 2018⁸¹.

“Because of the large number of tourists and local visitors, our streets are swept and hosed down daily by the municipality. That is not to the credit of our organisation, but it does happen.”

“Because tourists feel more comfortable when the quality of public spaces is good, it makes sense for the government to guarantee this. Residents benefit at the same time, so the knife cuts both ways.”

The appearance of an area is not only about the built environment, but also the people who live there. Of course there are people who prefer not to share their surroundings with outsiders, but a reasonable increase in visitors is often seen as improving the

atmosphere^{68 72}. When there is a balance between residents and visitors, visitors can create liveliness and cosiness in shops, restaurants, nightclubs, etc.¹²⁶. This is also clear from research for a thesis into the attitudes of inhabitants of Vlissingen towards tourism. The residents felt that tourism brings excitement and prevents dullness. Some residents even said they stay at home during the summer and go on holiday during other periods, as they enjoy the tourist activities during the summer. One of the respondents put this very clearly; “it is dead here in the winter and alive in the summer. Tourism livens things up”¹²⁷.

“In some places, tourism puts too much pressure on the environment, while in other places more people would be welcome.”

In the survey (Table 16), 60-70% of respondents recognise the positive impact of T&R on the quality of public spaces, infrastructure and mobility, quality and quantity of public transport and/or quantity and quality of public facilities. On the other hand, some 15% indicated that the impact on infrastructure and mobility was perceived as negative. Context dependence is also apparent with respect to the other components: in places where there are relatively too many tourists, the impact can turn from positive to negative. Case study 8 shows how the RAI contributes to the level of public amenities.

Table 16. Survey result ‘Quality of public spaces’, ‘Infrastructure and mobility’, ‘Quality and quantity of public transport’ and ‘Quantity and quality of public services’

| Indicator | % Positive influence | % Negative influence | Position in Top 25 |
|--|----------------------|----------------------|--------------------|
| Quality of public spaces | 77% | 9% | 24 |
| Infrastructure and mobility | 68% | 15% | 23 |
| Quality and quantity of public transport | 65% | 4% | 25 |
| Quantity and quality of public services | 59% | 3% | 16 |

Case study 8: Improving infrastructure and public facilities (RAI)

Some businesses use their parking lots as an additional source of revenue and make them available for carriers or other purposes when the parking lot is not in use. In addition, in some situations, businesses provide infrastructure improvements. One example is the RAI in Amsterdam that, through the Master Plan 2030, is involved in the construction of a tunnel outside the ring road so that trucks no longer have to enter the city. The construction is of course organised by the respective municipalities, but has been promoted by the businesses.

In addition, every Thursday the RAI, in cooperation with the Salvation Army, provides meals with the food left over after fairs. The meals are prepared by cooks and then distributed. The RAI also partners with the Food Bank and Farmers for Farmers. In addition, at the end of a fair there is a 'donation room'. Here all exhibitors can donate items that will no longer be used. Charities are then invited to come and take what they can use. To promote contact with the neighbourhood, the RAI invites local residents to come take a look behind the scenes under the name 'RAI discovery'. During and after events, RAI employees go into the neighbourhood to clean up. Finally, the RAI provides spaces for group 8 musicals and provides retirement homes with a stage or set pieces when needed. All these activities are supervised by the CSR manager.

Conclusion

Participating in T&R brings added value to everyone. The relationship between well-being and leisure has been widely studied and proven. One of the basic concepts here is 'happiness'. Holidaymakers generally feel better during their holiday, compared to their daily lives. This stems from psychological well-being and psychological growth (pleasure and relaxation lead to a decrease in stress and T&R provides space for reflection), being active, connections with others (contact, sociability, emotional security, love, social bonding and a well-being), satisfaction with spending and comfort. The respondents to the survey recognise this and indicate that their customers are particularly looking for relaxation, fun, inspiration, social contact and reflection.

Table 17. Overview of scores from the survey in terms of T&R's contribution to societal values

| Indicator | Position in Top 25 | % Positive influence | % Negative influence |
|---|--------------------|----------------------|----------------------|
| Jobs | 1 | 97% | 0% |
| Revenue for businesses, residents and government | 2 | 96% | 0% |
| Revenue for suppliers | 3 | 95% | 0% |
| Quality and quantity of hotels, restaurants and bars | 4 | 94% | 6% |
| Quality and quantity of recreational facilities (museums, amusement parks, etc.) | 5 | 91% | 2% |
| Business climate of the region (for companies) | 6 | 82% | 2% |
| Route networks for cycling, hiking, boating, etc. | 7 | 92% | 2% |
| T&R makes us less dependent on other sectors (Negative impact: Region too dependent on T&R) | 8 | 69% | 21% |
| Quality of cultural heritage | 9 | 87% | 3% |
| Special or trend-setting events | 10 | 85% | 2% |
| Local pride in the region | 11 | 92% | 5% |
| Quality of natural heritage | 12 | 68% | 25% |
| Encounters between people | 13 | 85% | 4% |
| Diversity | 14 | 71% | 7% |
| Inclusiveness | 15 | 73% | 4% |
| Quantity and quality of public services | 16 | 59% | 3% |
| Knowledge development and innovation | 17 | 75% | 1% |
| Education and jobs for people with fewer opportunities | 18 | 60% | 2% |
| Quality and quantity of retail trade | 19 | 83% | 7% |
| Opportunities for staff to learn skills | 20 | 88% | 1% |
| Career prospects | 21 | 79% | 0% |
| Social cohesion | 22 | 58% | 11% |
| Infrastructure and mobility | 23 | 68% | 15% |
| Quality of public spaces | 24 | 77% | 9% |
| Quality and quantity of public transport | 25 | 65% | 4% |

The value of tourism to the living environment is emphatically represented in the above top 25 values. On the one hand, the living environment is part of the tourist-recreational product and, on the other hand, it is influenced by it. As a result, T&R directly affects the quality of life of residents, both positively and negatively. Although several population surveys (Friesland, Limburg, Zeeland) show that residents overwhelmingly support T&R, they do not turn a blind eye to the potentially negative effects.

One of the ways in which T&R contributes directly to the living environment is

because tourist-recreational facilities and hotels, restaurants and bars offer their services and products to the residents of the region (nos. 4 and 5). Often the residents are even the regulars. These residents can relax and enjoy entertainment, and the range of activities provided can improve their quality of life and their appreciation of their living environment, provided it is of sufficient quantity, quality and diversity. The companies/organisations that participated in the survey mention their active contribution to the realisation of route networks for cycling, walking and boating (no. 7). With regard to organising leading business and public events (no. 10),

it is indicated that, on the one hand, the presence of tourists and recreational visitors and the associated facilities make a region interesting for organising events and that, on the other hand, events in turn contribute to the attractiveness of the region for visitors.

T&R contributes to the retail trade (no. 19) when it actually leads to a diverse and qualitative range of activities, or can ensure that certain desired activities do not disappear. This downside is also mentioned in the literature and in the survey; when there are too many visitors or the visitors do not fit into the existing range of activities, the likelihood of over-exploitation is high. Such as the one-sided range of cheese and souvenir shops in the centre of Amsterdam. While, on the one hand, the relationship between T&R and cultural (no. 9) and natural heritage (no. 12) makes the region attractive to tourists and recreationists, on the other hand, T&R can contribute to the preservation and accessibility of this heritage. Think of revenue from spending by visitors that is used for maintenance, maintaining crafts and traditions, investments from the sector in culture and nature, T&R as justification for public investment in nature and culture and increasing awareness of the value of nature and culture. But good destination management is needed to prevent an overabundance of T&R resulting in too

much pressure on heritage and/or higher maintenance costs. The sector recognises this and is mindful of, for example, the development of tourist-recreational facilities in line with the existing style or cultural heritage, waste management, circular construction and other elements of sustainability.

Those who responded to the survey and various resident surveys endorse the positive contribution of T&R to public facilities and infrastructure (no. 16). They see T&R leading to increased investment and support for new public amenities, such as public transportation, health care, police, and the road network, and that synergy can emerge between the needs of visitors and residents. Think, for example, of bus routes for tourists that are also used by residents. Of course, there is another downside: visitors can also create pressure on these amenities. It is important that visitors are included in the planning and budgeting of amenities. Similarly, for the quality of public spaces (no. 24), residents recognise that investments made from a T&R perspective can also be positive for them. The presence of tourists and holidaymakers also creates atmosphere and brings liveliness and sociability. However, in places where there are too many tourists, the influence can turn from positive to negative.



Photo: Verkade Factory ©Mike Bink

Benefit for social processes

T&R can have an enormous impact on the everyday life of a region’s residents⁶⁸. This influence extends beyond the living environment. T&R can contribute to a sense of safety, pride, identity, inclusion, etc.¹²⁸.

In this way, T&R influences socio-cultural aspects such as routines and habits, but also deeper layers such as the world view and the extent of values¹²⁹. Whether this influence is positive or negative depends on how T&R is developed.

Feeling safe

The development of T&R will benefit from thoughtful planning that is supported by both businesses and residents. This is important for *safety*, among others. The presence of tourists and holidaymakers can contribute to, but also detract from, a sense of safety. Think of theft, gambling, vandalism and addiction⁷¹. Recreation, and especially sport, can have a positive influence on youth crime and anti-social behaviour because it not only wards off boredom, but because it also brings with it sporting standards^{130 131}.

“With T&R, there are more people on the street and that makes you feel safer, but visitors can also cause problems.”

~

“We take part in programmes to increase safety in the city for the benefit of our visitors.”

In addition, T&R can also result in an increased sense of security if planning includes providing cycle and walking paths, greenery, and routes designed to accommodate traffic flows^{132 133}. The multiple ways in which T&R affects safety are also reflected in the percentages in the survey: 49% positive and 12% negative. See Table 18.

Table 18. Survey results ‘Safety’

| Indicator | % Positive influence | % Negative influence | Position in Top 25 |
|-----------|----------------------|----------------------|--------------------|
| Safety | 49% | 12% | - |

Our region is worthwhile visiting

Much has been written about T&R and *regional* pride. The arrival of visitors can have the effect to changing the way residents perceive their own environment and culture. Residents feel proud because their region is apparently worth visiting¹⁹. In the case of museums, one speaks of a 'value of existence' in addition to the 'value of use' and the 'value of options'; people are proud of their museums, even if they do not visit them themselves³². In events, this is called 'psychic income'. This is the satisfaction that accompanies events; the civic pride that comes from organising an event in one's own neighbourhood and the sociocultural interaction that goes with it³⁴. Pride also emerges in surveys of residents that gauge attitudes toward tourism. In Zeeland, 58% of the participants in the residents survey agreed with the statement: "Through tourism, I want to tell others what my community has to offer"⁸¹.

"Our City Marketing Policy has made a substantial contribution to the pride of our residents."

~

"The more people 'on the outside' are positive about it, the more that leads to pride."

Incidentally, this percentage varied widely for different municipalities. This is also reflected in the research study into the attitudes of residents of Vlissingen towards tourism. The author concludes: many residents are proud of Vlissingen and this is partly due to the development of tourism¹²⁷. One respondent aptly answers: "Yes, I'm quite proud! I've lived here all my life, so I don't know any different of course. But it's just ..., it always gives you a good feeling in the summer months when you're on the beach or walking along the boulevard. You're proud when you see that"¹²⁷. The panel survey that was part of the residents

survey in Friesland found that nearly three-quarters of the participants believe that tourism creates pride and awareness of the uniqueness of Frisian culture⁶². This awareness can also be triggered by tourism presenting intangible traditions and customs in a conscious manner. The tourism industry helps to preserve intangible heritage¹³⁵.

In our survey, the contribution of T&R to the 'pride of residents' was frequently endorsed (92% see the positive impact, no. 11 in the top 25). A number of times it is mentioned that it is the active involvement of residents that is the contribution of the own organisation (for example: "we encourage this pride, including via the scheme: 'ask-a-local' and we regularly share posts on social media in which we engage with residents so they feel a sense of pride." In line with the above, it is also mentioned that tourism/visitors from outside the region play a role in the awareness of residents of how special or beautiful their region is. See Table 19.

T&R can also create *iconic value*; attractions or accommodations take on symbolic meaning. For example, think about sports facilities. A stadium often becomes a meaningful place for a large group of people because of the frequent and regular visits and memorable events that take place there. Factors such as location and architecture also play a role¹³⁶. This iconic value is not only reserved for stadiums, think also of the Eiffel Tower in Paris or Dam Square in Amsterdam. Iconic places acquire their character because, over time, collective memories add lustre. Residents, however, must also be able to feel at home in such places. For example, the 'Dining Wheel' in Rotterdam, intended as an iconic attraction, had to be demolished because of the privacy of the people living in the vicinity¹³⁷. Seeking local support remains important for creating value.

The *identity of residents* is also influenced and/or emphasised by T&R. In the Limburg residents survey, 59% indicated that "tourism helps to preserve cultural identity"⁶³.

Although the ideal of a homogeneous identity turns out to be a myth¹³⁸ because not all inhabitants feel equally connected to a region¹³⁹, tourism has an influence on identity. For example, regional stories, meanings and symbols from everyday life are used in promotional materials¹⁴⁰. This use of identity raises awareness among residents. As the responses of the survey participants also show, balance is essential: Tourist-recreational activities, and the liveliness that goes with it, can make people feel comfortable and safe - but if the activities are too focused on people 'from outside', it can lead to the impoverishment of the activities. Although 64% of respondents see a positive influence of T&R on the 'sense of home', 20% see a negative influence and this indicator of value does not finish in the top 25. See Table 19.

The need for balance is also emphasised in literature: commodification lies in wait and there is a fine line between using an authentic story and exploiting an authentic story. Van der Duim and Lengkeek suggest

that the use of identity should not only take into account the great common denominator, but should also take into account the practices, perspectives and interests of different groups. This multi-voiced approach creates a richer representation of a destination, reinforcing local identity and connection to the region¹⁴⁰. Involving residents in zoning development is a prerequisite for allowing identity and culture to grow, rather than erode¹⁴¹.

“We tell the story of Ermelo and the Veluwe and focus on regional awareness.”

~

“By facilitating events with a nationwide appeal, we contribute positively to the image of the region.”

“[Mass] tourism can lead to impoverishment of supply. Like souvenirs for tourists and dance especially for tourists. The authentic disappears, even if tourists think it’s an authentic experience.”

Table 19. Survey result ‘Residents’ pride in the region’ and ‘Extent to which residents feel at home in the region’

| Indicator | % Positive influence | % Negative influence | Position in Top 25 |
|--|----------------------|----------------------|--------------------|
| Local pride in the region | 92% | 5% | 11 |
| Extent to which residents feel at home in the region | 64% | 20% | - |

Better understanding of and for others

T&R can also lead to cultural exchange; better understanding between residents and visitors. Encounters between the two are inevitable, as residents are part of the 'tourist experience'^{142 143 144}. Even when this is not the priority of visitors, there are many short-term interactions regarding information or the purchase of goods and services. Allport suggests in his 'intergroup social theory' that when groups of people from different backgrounds and cultures have contact and get to know each other, they can eliminate prejudices and make friends¹⁴⁶. There are also studies showing that residents cite cultural exchange as a benefit of tourism¹⁴⁷. However, the outcome of the encounter between visitors and residents is precarious. It depends on both the residents and the visitors. The level of education of residents influences the extent to which they can communicate with visitors and, in addition, the image they have of visitors also plays a role¹⁴⁸. When residents learn about the language and background of visitors, there is a better chance for mutual understanding. The quality of contact also depends on the visitors; for example, the type of visitor and the expectations of the visitor and their personal attitudes, such as tolerance, are important^{149 150}.

Finally, cultural exchange can only succeed if the following criteria are met: there must be a certain degree of equality, the groups must come together and there must be support from the local authorities¹⁵¹. This support must extend beyond not 'getting in the way'¹⁵²; the government can contribute positively by investing in the education of residents and by deliberately targeting a certain type of visitor. See Appendix 1 for an overview of the roles of different authorities with regard to managing T&R.

In our survey, many of the respondents pointed to the 'facilitating' role of their organisation in meetings between people. One example is museums. In 2019, there were 32.6 million visitors to the more than 400 museums affiliated with the Museum Association and 34 million to all museums in the Netherlands¹⁵³. It is also mentioned that tourism plays an important role in society: if there are no 'visitors from elsewhere' there is less diversity in encounters between people.

“Those working in tourism have much more contact with travellers and thus meet people they might otherwise not have met.”

~

“We bring tourists and locals together in a respectful way. This fosters mutual understanding. If tourism is not conducted respectfully, it is actually negative.”

~

“We host and sponsor many community initiatives: The neighbourhood drinks get together, the cleaning day, etc.”

~

“Our guesthouse is located in a Nubian village so there is direct contact between tourists and locals. We also organise meals with/at Nubian families, staff invite customers to their homes, etc.”

~

“Volunteering at the castle has an important community function”

Meetings that take place in foreign regions between Dutch people and 'locals' also have a positive influence on people's perspective when they return to the Netherlands. Excessive crowding and/or differences between residents and visitors may cause residents to perceive interaction with visitors as negative. 85% see a positive influence of T&R on people-to-people encounters and in the Top 25 this value is number 13. See Table 20. Case study 9 shows how the 'Untourist Movement' attempts to create special and valuable encounters between residents and visitors, and what they are up against.

Table 20. Survey result ‘Encounters between people’

| Indicator | % Positive influence | % Negative influence | Position in Top 25 |
|---------------------------|----------------------|----------------------|--------------------|
| Encounters between people | 85% | 4% | 13 |

Case study 9: Reinventing tourism together (Untourist Movement)

The Untourist Movement in Amsterdam focuses on the future of tourism by organising fun activities where tourists actively and consciously contribute to the city, its inhabitants and the world at large. Examples are ‘Marry an Amsterdammer for a day’, ‘From Trash to Treasure’, ‘Weed dating’, ‘Kids cooking Class’ and ‘Trash Hero’ (www.untouristguide.com). While organising these activities, the organisation had to deal with positive but also negative factors. The positive factors include:

- Choosing a positive path. What worked very well was to approach everything positively. ‘Change with a smile’ is therefore the subtitle of the book that has been published. The tourism situation in Amsterdam is a challenge. There is much criticism and not always much action. By framing the activities in a positive way, progress is possible.
- Media. The Untourist Guide has been written about all over the world. Also by top international newspapers, such as the Guardian, Monde el Pais and the Telegraph. But of course national newspapers, such as NRC and ‘t Parool, also covered it. Obviously this is great and not by chance. From the start, this was managed by thinking about how to make the activities newsworthy.
- Creating something with people who want to achieve something. Creating things together in many ways, with blood, sweat and tears and with a ‘coalition of the willing’.
- Negative factors include:
 - No good lender or subsidiser. This means that while some of those involved get things done quite well, others do less well. The latter is not fun to record because the people involved do not deserve it. In slightly more political terms, there are no funds available to pay for a good team.
 - Time-consuming. It takes a large investment of time to create something like the Untourist Movement and that makes it difficult to scale.
 - The subject may be sensitive. Those sensitivities also act as a kind of threshold. Certain parties do not want to participate. The municipality, for example, is one of them. But also other major parties. This is a sensitive subject and a somewhat exciting approach, which some people would rather not involved in. It is difficult to find a party to support the initiative and be prepared to fund it.

In addition to contact between residents and tourists/recreationists, the survey also asked about contact between residents and the tourism/recreational organisations/companies themselves. Table 21 shows how this contact takes place. The 4th option ‘Contact between residents and customers/guests ...’ refers to the contact between

residents and visitors discussed above. All other options involve other forms of contact. The dominant view is that residents themselves are mainly customers/guests of the tourism and recreation organisation and/or are employed there.

Table 21. Contact between organisations and residents

| How does contact take place between your organisation and the residents of the region? | |
|--|-----|
| Residents as customers/guests | 52% |
| Residents as employees | 50% |
| Residents as ambassadors | 30% |
| Contact between residents and my organisation's customers/guests (who are not residents) | 30% |
| Residents with an advisory role | 27% |
| No contact | 2% |
| Other, specifically ... | 4% |

In “Other, specifically...” it is mentioned that residents play a role as supplier, service provider or volunteer and are actively involved in stakeholder processes. A number of organisations indicate that they are in the process of giving residents a more active role, for example in guiding tourists or providing them with information. When asked about the degree of contact between the organisation and the residents of the region, more than half (56%) give a rating of 4 or 5 (0=no contact, 5=intensive contact). Only 8% of those surveyed indicated that the organisation/company has no or very limited contact with residents of the region. Subsequently, over 80% of those questioned indicated that contact between residents and their organisation/company is experienced as positive to very positive. 80% feel

“As a community café we receive many requests for help”

“Due to my large network, I know local guides, musicians, residents who work in the service industry. With them, and again through their contacts, I expand the network and am able to create wonderful and special programmes. Residents are aware that my organisation has a social value in the region.”

that residents are aware of the social benefits of T&R in the region. 70% of those interviewed are also aware of the image that residents have of their organisation/company specifically.

However, they also have some critical remarks when it comes to the awareness of residents. See the last two quotes on the right. Some of the respondents indicated, in contradiction to the above general conclusion, that there is support for R&T but that residents are not or are insufficiently aware of the economic and social value of the sector.

“Residents see no connection between visitors from outside the region and cultural facilities. For that notion to be understood, a number of museums must first close (e.g., due to corona) [...]. Perhaps this will bring some understanding.”

“I think that many residents recognise the social value of the Rijksmuseum for the region, but in relation to tourism in pre-corona times this was sometimes seen as negative due to overcrowding in the city.”

Anyone can participate

It is important for Dutch society that as many people as possible get a chance to participate. The tourism-recreation sector plays an important role in *inclusion*: it provides employment for people with many different backgrounds, ages and levels of education, as well as for women, young people and those living in rural regions with shrinking populations¹⁵⁴. A study of employment in tourism in Canada, for example, shows that within tourism, women, young people, the low-skilled and migrants are over-represented. This applies in particular to the hotels, restaurants and bars¹⁵⁵. This is partly due to the nature of the work, but also because opportunities are also consciously created through apprenticeships for people with disabilities.

In Case study 10, you can see how Café Central, Watersport Camping Heeg and Blijdorp Zoo deal with inclusion: both in terms of their employees and their dealings with their customers/guests.

“Our autistic colleague has been with us for 4 years and went from not daring to look at people to being the best dancer of us all on the staff party stage.”

~

“In our company we have 7 employees with poor job prospects.”

~

“The increase in tourists with disabilities means they are also more likely to see the value of modifications. In hotels, public buildings, restaurants and bars, but also on the street through accessible entrances, etc.”

Case study 10: Café Central, Watersports Camping and Blijdorp Zoo

Some entrepreneurs, such as Café Central in Soest and Watersport Camping Heeg, work together with care institutions to give people with poor job prospects an opportunity to advance themselves further. The direct contact with other people is ideal for the development and independence of people with poor job prospects.

Diergaarde Blijdorp in Rotterdam takes the importance of accessibility for disabled and blind people for granted. For example, there are scanning checkouts for people in wheelchairs and numerous facilities for the disabled and blind. The Zoo considers this quite normal, but others see it as special.

The sector is becoming increasingly aware of diversity. The Rotterdam Council for Art and Culture (RRKC) and Erasmus University Rotterdam analysed eighty years of reports on Rotterdam’s cultural institutions and conducted a survey among 65 representatives. More than half of the institutions said they adhered to the cultural diversity code. 41% implemented explicit policies to promote cultural diversity¹⁵⁶. Diversity goes beyond the workforce. Theater Zuidplein, for instance, has its own approach. They largely base their programme on what the public wants

to see and make their own productions, rather than just looking for audiences for existing productions¹⁵⁷.

Museums, too, are moving from an exhibiting and managing function to a social function¹⁵⁸ and in doing so are adopting inclusive approaches¹⁵⁹. This is also known as ‘new museology’¹⁵⁹. One example is the Arnhem Open Air Museum. The exhibition of the Moluccas Barracks, the barracks where Moluccans were housed in the 1960s, waiting to return to their homeland, was created in close consultation with Moluccan

groups¹⁵⁹. Many museums consciously offer multiple perspectives¹⁵⁹. Thus, the Open Air Museum offers not only the Moluccan perspective, but also the perspective of the victims of the train hijackings by Moluccans.

“By posting on social media we try to share facts, etc. so that people become more familiar with various backgrounds.”

~
“Our team members come from 40 different countries and all 350 of them form an extremely close-knit team.”

~
“During festivals, it creates a bond between visitors from diverse backgrounds and encourages everyone to be themselves.”

~
“Both Christians and Muslims work for us, which encourages mutual understanding.”

T&R creates a place where play is allowed, a place for unusual¹⁶⁰. sport and play, events and art, but also theme parks offer playfulness and lightness¹⁶⁰. This can help ensure that ‘different’ is accepted.

Festivals can feature obscure bands, attractions can call attention to emancipation and travel guides can break taboos; T&R gives scope for that.

“As a meeting place for the people with the wet and dry hotels, restaurants and bars as a lubricant, it certainly contributes to social cohesion.”

~
“Tourism may make it less likely that a conflict will escalate.”

~
“Destinations should not be overrun by tourists, driving out the local population. It should blend together so that tourism contributes to social cohesion.”

The survey percentages (Table 22) also show that the positive impact of T&R on inclusion and diversity is recognised. Social cohesion scores are somewhat lower (58%) and 11% of respondents pointed out that T&R can also have a negative influence. The explanations (see also the quotes on the right) show that this mainly refers to the situation where too many tourists endanger social cohesion. Case study 11 below shows how Café Central contributes to *social cohesion*.

Table 22. Survey results ‘Inclusion’, ‘Diversity’, ‘Education and jobs for people with fewer opportunities’ and ‘Social cohesion’

| Indicator | % Positive influence | % Negative influence | Position in Top 25 |
|--|----------------------|----------------------|--------------------|
| Inclusion | 73% | 4% | 15 |
| Diversity | 71% | 7% | 14 |
| Education and jobs for people with fewer opportunities | 60% | 2% | 18 |
| Social cohesion | 58% | 11% | 22 |

Case study 11: Social cohesion (Café Central)

The business owner of Café Central started in Soest and then expanded to six other catering companies. The social value of the businesses and the sector in general is that it can act as ‘cement between the bricks’. Or in other words, it can connect people. In addition, the entrepreneur is very involved in volunteer work and active in the municipality by organising all kinds of activities, such as parades, festivities, packages, creating tourist routes and charities.

Conclusions

The contribution of T&R to **social processes** are mainly found in the second half of the top 25. Therefore, these are effects that not everyone will immediately notice or that may be somewhat less obvious.

The presence of tourists and holidaymakers can contribute to a sense of safety. For example, when planning ensures cycle and walking paths, greenery and routes designed for visitor flows. At the same time, T&R can also have a negative impact on perceived safety due to theft, gambling, vandalism and addiction.

Much has been written about T&R and regional pride (no. 11). Residents appreciate their own environment and culture in a different way with the arrival of visitors. They feel proud because their region is apparently worth visiting. Tourist-recreational facilities (sports stadia, museums, special buildings) are given an iconic value, contributing to the identity of the region. The use of regional stories, meaning and symbols within tourism can further strengthen that identity, although there is a risk of commodification. Involving residents in zoning developments is a prerequisite for allowing identity and culture to grow, rather than being eroded.

Table 23. Overview of scores from the survey in terms of T&R's contribution to societal values

| Indicator | Position in Top 25 | % Positive influence | % Negative influence |
|--|--------------------|----------------------|----------------------|
| Jobs | 1 | 97% | 0% |
| Revenue for businesses, residents and government | 2 | 96% | 0% |
| Revenue for suppliers | 3 | 95% | 0% |
| Quality and quantity of hotels, restaurants and bars | 4 | 94% | 6% |
| Quality and quantity of recreational facilities (museums, amusement parks, etc.) | 5 | 91% | 2% |
| Business climate of the region (for companies) | 6 | 82% | 2% |
| Route networks for cycling, hiking, boating, etc. | 7 | 92% | 2% |
| T&R makes us less dependent on other sectors (Negative impact: Region too dependent on T&R) | 8 | 69% | 21% |
| Quality of cultural heritage | 9 | 87% | 3% |
| Special or trend-setting events | 10 | 85% | 2% |
| Local pride in the region | 11 | 92% | 5% |
| Quality of natural heritage | 12 | 68% | 25% |
| Encounters between people | 13 | 85% | 4% |
| Diversity | 14 | 71% | 7% |
| Inclusiveness | 15 | 73% | 4% |
| Quantity and quality of public services | 16 | 59% | 3% |
| Knowledge development and innovation | 17 | 75% | 1% |
| Education and jobs for people with fewer opportunities | 18 | 60% | 2% |
| Quality and quantity of retail trade | 19 | 83% | 7% |
| Opportunities for staff to learn skills | 20 | 88% | 1% |
| Career prospects | 21 | 79% | 0% |
| Social cohesion | 22 | 58% | 11% |
| Infrastructure and mobility | 23 | 68% | 15% |
| Quality of public spaces | 24 | 77% | 9% |
| Quality and quantity of public transport | 25 | 65% | 4% |

T&R can lead to cultural exchange (referred to in the survey as 'encounters between people' - no. 13). When groups of people from different backgrounds and cultures have contact and get to know each other, they can break down prejudices and make friends. An extension of the contact between residents and visitors is the contact between residents and tourist-recreational businesses. The companies/organisations that took part in the survey see residents as guests (52%), employees (50%), ambassadors (30%) or advisors (27%) and predominantly rate the contact as very intensive (56%) and very positive (80%). 80% of organisations feel that residents are aware of the social benefits of T&R. 70% of the interviewees have the same idea when it comes to the image that residents have of their organisation specifically.

The companies/organisations in the T&R sector employ many people with many different backgrounds, ages and education levels. Inclusiveness (no. 15) is therefore important for the tourism and recreation sector. The sector provides employment for low-skilled workers, women, young people and people in rural areas with shrinking populations, as well as providing education and jobs for people with fewer job prospects (no. 18). The sector is becoming increasingly aware of diversity (no. 14). Think of museums and other cultural institutions that actively promote diversity. The role that the sector plays in bringing people together (see also above) means that it can make an important contribution to social cohesion (no. 22).



Photo: Steenwijk Harbour copyright Hiswa Recron



Maintaining / increasing societal value

In the survey, we asked the companies/organisations whether they have plans to invest in the next three years. The follow-up question was whether, and how, this investment increases their social value. In this section, we discuss the answers to these questions.

Table 24 shows that 66% of survey respondents have plans to invest. Table 25 shows that, within that group of 66%, 43.7% foresee this investment increasing its contribution to the regional economy. For the level of facilities, living environment and social processes, the percentages are 33.1%, 31.4% and 28.6% respectively⁴. In the explanations in the last column of Table 25, contain the same statements

as discussed above. Economic value, for example, involves the generation of more employment, contribution to the business climate and more spending.

⁴ The survey asked about the contribution of the investment to the level of amenities and the living environment. In these reports, this has been merged into the element 'living environment'. Here, however, the two separate percentages are shown.

Table 24. Investment plans

| Do you have plans to invest in the next 3 years? | |
|--|-------|
| Yes | 65.7% |
| No | 12.2% |
| Undecided | 22.0% |



Photo: Piet Hein Eek restaurant ©Bobby Born

Table 25. Relationship of investment to social value

| Does this investment increase the social value of your organisation? | | |
|---|-------|--|
| The investment increases our contribution to the regional economy. | 43.7% | More employment, makes region more attractive, improved business climate for companies, more visitors to the city, longer stay, more income, more indirect effects (purchase of products from suppliers/ involvement of local entrepreneurs in investment plans), more tax revenue. |
| The investment contributes to the level of amenities. | 33.1% | More visitors lead to more use of and income for hotels, restaurants and bars and the retail trade, more/ better recreational facilities for residents, more visitors lead to the maintenance of public facilities, more attention to sustainability, maintaining the quality of heritage, improving art and cultural experiences, new creative programmes, a podium for starting artists, improvements to the living environment to make it more pleasant, attractive and beautiful, improvements to walking and cycling paths, contribution to liveliness, combating vacancy, maintaining and modernising old buildings, improved business climate for residents, maintain/improve nature and landscape, maintain/improve quality of public space, improve balance between residents, visitors and nature. |
| The investment contributes to the quality of the living environment. | 31.4% | |
| The investment contributes to social processes | 28.6% | Safer environment, improved clarification of social and societal themes, creating workplaces for people with poor job prospects, facilitating meetings, discussions and connections, encouraging/facilitating training in collaboration with schools, more collaboration with people and institutions, more attention to inclusion such as identity of different groups strengthened and balanced, greater accessibility for various groups, making art and culture easily accessible. |
| This investment does not create greater social value for my organisation | 6.5% | |
| I don't know | 8.2% | |
| Other, specifically | 2.4% | |

Of course, an intention to invest does not necessarily lead to the realisation of that investment. We therefore asked what factors are expected to play a role in whether or not an investment is made. See Table 26. Again, these are the answers of the 66% of respondents who have plans to invest. It goes without saying that financial resources, the

development of the corona pandemic and market conditions play an important role, but government support and rules and guidelines are also emphatically considered. This is a logical stepping stone to the next section, where we look at the roles of parties in maintaining and/or enhancing social value.

Table 26. Factors involved in whether or not to invest

| What factors play a role in the decision of whether or not to invest? | |
|---|-------|
| Financial resources | 48.6% |
| The development of the corona pandemic | 34.7% |
| Support/subsidy from the government | 35.5% |
| Market conditions | 29.4% |
| Rules and guidelines | 14.7% |
| Time | 14.3% |
| Workforce available | 9.0% |
| Expertise | 8.2% |
| Other, specifically ... | 5.7% |



Photo: Harderwijk City beach_@Jurjen Drenth in connection with Visit Veluwe



Photo: Reception desk Hospitality event © Knowledge Network Destination Netherlands

Assistance in maintaining/ increasing societal value

In the survey and the cases, we also asked organisations in the sector what roles the various parties in their environment should play in maintaining and/or increasing their societal value. Which parties are involved and how can they support the sector and the underlying businesses in the best possible way? Below we discuss this for each party, starting with a number of recommendations that apply to all parties and then recommendations that apply to all authorities. Appendix 1 provides an overview of the current roles of various authorities with regard to managing tourism and recreation.

All the parties

- *Commitment to cooperation.* A destination does not consist of one organisation. It exists as a living environment in which, in addition to the tourist-recreational sector, residents and other sectors interact. Therefore, the sector has no choice but to cooperate with both private and public stakeholders^{118 161}. But this dependency is mutual; other players can benefit from T&R. This is not only a multi-stakeholder approach, but also an approach at different levels; local, provincial, national and international. Despite the fact that many issues occur at the regional level and require cooperation between municipalities¹⁰, cooperation is also needed between different levels of government (see Appendix 1). There must be coordination between levels of government, and central government can play a role by setting agendas and facilitating¹⁰. In addition to the private sector and government agencies, there is also a role for non-governmental organisations and residents⁸⁴.
- *Involve residents.* With respect to residents, a lack of participation may detract from support for T&R. The residents survey in Zeeland shows that only 12% agreed with the statement “I have a voice in the decisions surrounding tourism developments in my municipality”⁸¹. Involving residents, the second recommendation, is becoming increasingly important. This is also clearly reflected in the new Environment and Planning Act (Omgevingswet) where the participation of all stakeholders, including citizens, is a key pillar. For example, in Zeeland there are participation meetings for the Veerse Meer vision⁸¹. But citizens also influence decision-making in less formal ways. For example, there are regular citizen initiatives and petitions. There were protests against several large-scale recreation complexes, which resulted in changes to provincial decision-making. When taking the carrying capacity of a destination seriously, there is no other option but to involve residents. In doing so, we must not only take into account the majority. Minorities and vulnerable groups should be included⁸⁴.
- *Develop and share knowledge about achieving balance.* A third recommendation concerns expertise. Expert knowledge about visitor pressure and carrying capacity¹⁰. Many effects of T&R, both positive and negative, are context-dependent. This means that there is not one solution that works everywhere. For example, the effects depend on the type of tourism and tourists, residents and the physical environment⁸⁴. Expert knowledge is needed about the effects of T&R on the environment and society, as well as the impact of interventions¹⁰. To prevent the effects from ‘happening to occur’ to a region, it is also necessary to monitor the pressure and carrying capacity^{10 161}. In its advisory report ‘Desirable Tourism: Capitalising on Opportunities in the Living Environment (2019)’, the Council for the Environment and Infrastructure (Raad voor de leefomgeving en infrastructuur, RLI), advocates building and maintaining a powerful knowledge infrastructure.

All authorities

- *Adopt a broad approach with regard to T&R.* An approach that not only focuses on economic profit or the business side, but also takes into account the opportunities and possible negative consequences for the living environment and social processes^{10 84 162}. This calls for a broad agenda for T&R, in which connections are sought with other policy areas: mobility, real estate, public space, nature, heritage, environment and quality of life¹⁰.
- *Think and act together with businesses.* Almost all businesses endorse the advice that government institutions should think along and act together with them. Businesses with social relevance should be embraced more strongly. In a conversation with a government agency, people are often told what they can and cannot do, but merely naming problems is not solution-oriented.
- *Support new initiatives.* New social initiatives must be supported and government institutions should finance them. The government is focusing on initiatives of businesses, but support when opportunities arise is also needed. Together, these opportunities can then be seized.
- *Facilitate coordination.* Government agencies can facilitate the conversation by bringing stakeholders to the table; businesses, residents, non-governmental organisations, etc. Getting different voices and different groups together at the table to look for common ground. This process is time intensive, but it does create support.

National government

- *Reduce the distance to businesses.* The national government is now too far removed from businesses. Several reasons have been mentioned for this, but underlying it all is the 'incomprehensible instruction manual' of the government with regard to the T&R sector.
- *Take tourism seriously as an industry.* The miscommunication between the national government and businesses starts with a lack of awareness of the role of T&R in the Netherlands. This is a large sector, with many and very diverse suppliers and an important social role. But there is fairly minimal attention from the government (see also Appendix 1).
- *Commitment by central government to expert knowledge about and from T&R.* The minimal role of the central government in T&R is - in the perception of businesses - accompanied by the lack of expert knowledge about T&R by the same government. The corona pandemic makes the distance between central government and tourism-recreation businesses clearly visible, and this could be an opportunity to reduce that distance by increasing expert knowledge.

- *Give T&R a logical place within the central government.* At the moment, T&R applies almost everywhere but no one really feels responsible (see Appendix 1 for an overview of the roles of various authorities with regard to T&R). It is expected that after the corona pandemic we will look at T&R differently and the government can play a big role in this. It is therefore argued that this role should be consolidated in, for example, a state secretary for tourism. A separate role such as this is common in many other countries.
- *Reform the tourist tax system.* Some businesses argue for a different tax system, in which positive social impact is encouraged and negative impact is taxed. More could be regulated if the social impact is included.

Provincial government

- *Reduce the distance to business and be more visible.* Many businesses mention distance or invisibility with regard to the provincial government. In fact, a business only comes into contact with the province if it is overlooked or with regard to complying with safety aspects.
- *Do not suddenly reverse subsidies.* Seven years ago, some subsidies were sharply reduced, resulting in many layoffs and pushing some businesses into the red.
- *Make subsidy applications easier.* Under current legislation, it is difficult to apply for subsidies because of the large number of conditions and rules. Subsidies are also often not sufficient for developing cost-effective initiatives. In addition, the complexity surrounding applications is partly due to civil servants who have to stick rigidly to rules and are subject to strict controls. Civil servants should therefore be given more responsibility to achieve goals themselves with a given budget.
- *Work together on a long-term vision.* Ensure better cooperation between province, municipalities and the sector and work together on a long-term vision. A good example is the 24-hour map in the Arnhem region, which was developed in consultation with businesses, municipalities and the province. More depth can be created by working on a long-term vision. Together, you can achieve something.

Municipal government

- *Assist businesses to find their way around municipal structures.* Initiating activities and applying for permits and rebates is currently an extremely complicated process. “An entrepreneur almost has to be a scholar to navigate its way”. A ‘job creation project’ should not involve a maze of different authorities. This process must be made easier. When determining permits and fees, businesses and the municipality should sit down together to determine what is possible, what the common goals are and what permits are needed or the level of any rebates. This works well, is clear and offers perspective.
- *Improve the distribution of risks when organising events and activities and work toward shared responsibility.* Currently, businesses carry all the risks. A business owner is often personally liable and this risk discourages businesses from organising something.
- *Focus on ‘connectors’.* There is a lot to be gained by connecting, cooperating and being interested in each other. Connectors are needed to counteract compartmentalisation.
- *Use the tourist tax to encourage quality.* The starting point should be that tourist tax is earmarked for further improving the quality of the tourist destination and, at the same time, improving the quality of the living environment of the inhabitants. To achieve this, local businesses should have more say in how the tourist tax is spent. What works well is to deposit the tourist tax into a fund and businesses can have a joint say in how this money is allocated. This has already been implemented in some municipalities because, according to the business, a deal was made with the municipality 15 to 20 years ago.
- *Have a clear vision of tourism.* For some of the businesses, it is unclear what the municipality really wants. It is important for a municipality to state clearly what it wants and expects from businesses. By making policy clear, businesses can respond and contribute to it.
- *See tourism as an opportunity to combat shrinking populations.* Some businesses located in the outskirts of a municipality or in a region with a shrinking population mentioned that a municipality could do more to support them in order to jointly ensure that the area is and remains attractive for residents, visitors and businesses. Young people in particular expect there to be ‘fun things to do’ in the area. Instead of ‘tightening the screws’, this requires an integrated vision, flexibility and support.

Industry associations

- *Think about reorientation.* Some businesses feel that industry associations should focus on reorientation. According to some, participation in industry associations is under pressure. Where industry associations were previously about acting as a group, business are now mostly acting individually. This means that support from the industry will need to change. Some examples mentioned are bringing people together, giving good practices a platform, getting the figures right, providing information and sharing expert knowledge.
- *View corona as momentum.* Corona can change the perception of the role of industry associations. How industry associations act now will determine their position in the coming years.
- *Lobbying at all levels of government.* Industry associations should lobby for the interest of the sector at all levels of government.
- *Facilitate cooperation with other relevant networks.* Industry associations have a large network and can facilitate cooperation with other networks. Suzie's Farm mentioned, for example, that farmers can cooperate with care institutions when it comes to the products available in the canteen or that some farmers produce food directly for restaurants. Normally, a restaurant uses a wholesaler, but if there is a network to use local produce directly from farmers, that is a good alternative. For some entrepreneurs, it is difficult to start up such cooperation. They never come into contact with a hospital director, but an industry association already has a large network. Within the event industry, the RAI has a need for collaboration with theatres, concerts, festivals, fairs, congresses, events, etc. Via the industry association, they have a strong voice for lobbying or initiating a discussion.
- *Some businesses need 'differentiation'.* KHN, for example, represents all hotels, restaurants and bars and this is a very diverse group. The representation of cafes is quite different from that of the hotels. These interests are obviously not all the same and sometimes differ enormously. This has been exacerbated by corona, because hotels could remain open while cafes/restaurants had to close.

Education and knowledge institution

- *Try to keep up-to-date with developments in the field.* Some businesses feel that education is lagging behind. There were many changes during the corona pandemic and education has not changed to keep pace with these changes. For example, while expectations and activities concerning internships have changed in practice, these changes have not been implemented by educational institutions.

- *Offer knowledge and expertise and contribute to innovations.* One business owner suggested working with living labs, where the education and business sectors work together on an innovative solution in a life real setting. Here, too, the education sector has to move faster. For example, education has a backlog with regard to themes such as sustainability, while in practice there is a huge demand for it.
- *Providing carrying capacity.* In addition to searching for new solutions and new expert knowledge, educational institutions provide a workforce in exchange for a learning environment. This workforce can be used for social purposes, through apprenticeships, internships, etc.

Banks

- *Do not let businesses close in hard times.* Some businesses are not fans of banking institutions because they feel that banks only help when things are going well and not when things are going badly. The banks move with the economy and that is currently a disaster for the tourism and recreation sector. There was some support from the banks at the beginning of the corona pandemic, but they soon pulled the plug. The appeal to the banks is therefore not to let the tourism and recreation sector down. One business owner mentioned that, even in these times, it would be a good idea if socially involved/sustainable/innovative businesses received more support in the form of cheaper loans.
- *Actively think along with businesses and try to better understand the sector.* Some entrepreneurs need co-creation and active thinking from banking institutions. Banks often still operate in terms of and have funds for various sectors, while some business concepts span several different sectors. Banks find this difficult and cooperation between different departments is often problematic, but it is important for businesses.
- *Building partnerships.* Businesses also want to build partnerships by connecting with the investor. At the moment, businesses are unclear about who has invested. Making the connection makes investing more personal.

Employee Insurance Agency (UWV)

- Aspects mentioned here include making it less cumbersome for smaller businesses to deal with illness and absenteeism, faster procedures and decision-making, and transparency. Collaboration with UWV can help keep personnel costs low, promote diversity in the workplace and can provide assistance in providing guidance to special needs employees. This is also important for providing support to employees who have been made redundant after a reorganisation and helping them from work to work.

The businesses and organisations who participated in the survey and case studies did not just provide comments about others. They also indicated what they themselves can do to further increase the societal value of the sector. The following points emerged as dominant.

- Commitment to corporate social responsibility (CSR). Some businesses work with a CSR manager or Green Team. This is a person or team within the organisation who develops the corporate social responsibility scheme of the organisation. This ultimately also bears fruit from a business point of view. Visitors are becoming increasingly critical and often also look at the social commitment of an organisation.
- Intensify contacts and cooperation with other companies. Some businesses think that companies can and should cooperate more. For example, the cooperation could be about future plans, overcoming problems or other issues, setting up a project/pilot, sharing information or joint promotion.
- Knowledge development and sharing A few businesses also mentioned that companies could be more aware of the developments within the sector and the government policy towards the sector. Acquiring and sharing this knowledge is not only a task of government agencies or industries, but also of companies themselves.



Photo: Meinweg ©Limburg Marketing

Conclusion

In this report, we have identified the social value of tourism and recreation (T&R) in the full breadth of the sector, based on a literature review, a survey of businesses and case studies. In the conclusions of the preceding sections, and in the executive summary, all these values are briefly explained. Here we will limit ourselves to the most important conclusions regarding that societal value and, based on the findings in Section 5, we will summarise what various parties in the sector environment, such as governments, industry associations, education and knowledge institutions, banks and UVW, can contribute to maintaining and/or increasing that social value.

Tourism and recreation ...

... is an economic sector of considerable size

The direct contribution of the sector to the Dutch economy can justifiably be called sizeable. For example, 91.2 billion euros are spent annually on tourism and recreation, the sector contributes 4.4% to the Dutch GDP and 7.5% (813,000 jobs) are employed in the sector. The contribution of business tourism and income from outbound tourism to the Dutch economy is also important. The total contribution of the sector is considerably more than other sectors, such as agriculture (2x!) and oil and gas extraction. The industry offers a wide diversity of jobs, requiring new skills and opening up career opportunities.

... contributes indirectly to other sectors

Through indirect effects, the sector provides additional income and employment for suppliers and can thus give a boost to a region. Artists and other creative professionals benefit from T&R, through financial support and the opportunity to showcase their creations to the world. Furthermore, T&R contributes to a good business climate, boosts property prices and helps people earn a living.

... increases the quality of life

T&R has a direct impact on the quality of life of residents. One of the ways in which T&R contributes directly to the living environment is that almost all companies and institutions in the sector also - if not primarily - offer their services and products to the inhabitants of the region. Residents themselves use route networks for cycling, walking and sailing and events, and attractions and facilities make a region attractive. The same residents also go abroad on holiday or business trips. In addition, T&R contributes to keeping retail, cultural and natural heritage, public facilities and infrastructure up-to-date and encourages investments. T&R thus offers a solution to all kinds of broader social issues such as shrinkage of population, sustainability, unemployment, social problems, etc.

... makes people happier

Holidaymakers and travellers generally feel better during their holiday, compared to their daily lives. This is due to psychological wellbeing as pleasure and relaxation lead to a decrease in stress. In addition, the sector offers space for reflection, development, activity, connections with others, such as contact, sociability, emotional security, love, social bonding and a sense of belonging, satisfaction with spending and comfort. All this both nationally and internationally and for both business and leisure tourists. It is therefore a remedy for things like deprivation, isolation and loneliness. In addition, the presence of tourists and holidaymakers can contribute to a sense of safety.

... connects groups of people

Wherever inequality is on the rise in a society, T&R creates connection and cohesion between groups of people. Much has been written about T&R and national and regional pride. The use of regional stories, meaning and symbols within tourism can further strengthen that identity. This includes preserving cultural and natural heritage and making it accessible. In addition, T&R can lead to cultural exchange. When groups of people from different backgrounds and cultures have contact and get to know each other, they can break down prejudices and make friends.

... is the 'social cement between the stones'

The companies/organisations in the T&R sector employ many people with many different backgrounds, ages and education levels. Inclusion is therefore an important value for the tourism and recreation sector. The sector provides jobs for the low-skilled, women, young people and those living in shrinking rural areas, as well as education and jobs for people with fewer opportunities. The sector is also increasingly aware of diversity, plays a role in bringing people together and thus contributes to social cohesion.

The corona pandemic emphasises the social value

“Only when something is no longer there are you aware what you are missing.” The measures taken as a result of the corona pandemic show very clearly the effects on society of the virtual closure of the sector. In economic terms, the sector and related industries and suppliers have been hit hard by the measures. But it also shows that its absence puts pressure on the quality of life and can lead to the erosion of the ‘social’ cement and the connections between people and their happiness.

Unity in diversity

The T&R sector is incredibly diverse. The branches of industry affiliated with Gastvrij Nederland, being VVV Nederland, VvKR, KNV, De Club van Elf, NVG, VVEM, VVTP, ANVR, NBTC, CLC-Vecta, ANWB, KHN, Schiphol, Federatie Cultuur, HISWA-RE CRON and FEC-Nederland, illustrate this diversity. As branches of industry, they all have different needs and wants and contribute to societal value in different ways.

Despite the enormous diversity of the sector, this report has attempted to capture what the sector as a whole contributes in social value and how different parties can help the entire sector realise or maximize this social value. Obviously, the customisation of each branch of industry is desirable. In addition to this report as a whole, it is good for each branch of industry to identify specific needs and desires for the part of the industry they represent. Several studies have already been published on the social value of branches of industry, such as ‘The Changing Role of the Destination Marketing Organisation’ (for DMOs)¹⁶³.

The sector needs assistance and framework conditions to maintain and, if possible, increase the social value of Tourism and Recreation.

In the survey and case studies, we also asked organisations/companies in the sector what roles different parties in their environment should play in maintaining and/or increasing their social value. Which parties are involved and how can they optimally help the sector and the underlying branches of industry?

Relevant parties that are mentioned are national, provincial and local authorities, industry associations, education and knowledge institutions, banks and the UWV.

The organisations/companies mention that in order to maintain and/or increase social value, it is necessary together with these parties to engage in collaboration, to involve residents and develop and share knowledge on how to achieve balance.

- The broad scope of the tourism-recreation sector makes cooperation almost a natural requirement and there are still steps that can be taken. Think about improving cooperation between public and private, and improving cooperation between local, provincial, national and international levels. The State can play an agenda-setting and encouraging role in this.
- It is essential to involve residents, as the group that ultimately benefits most from the social value but also experiences the negative aspects and makes an important contribution to the quality and development of the tourist and creative product. Organising involvement is challenging. For instance, how do you ensure that minorities and vulnerable groups are included? But if we take the carrying capacity of a destination seriously and want it to be successful, there is no other way.
- The last point concerns the balance between the positive and negative effects of T&R, the context dependence of these effects and the way in which these effects can be managed.

What is required from governments?

Leisure time is important, educational, social and healthy for everyone. The government has an important role to play in this, which is formally guaranteed in Article 22 of the Constitution (Grondwet).

“The authorities shall take steps to promote the health of the population. It shall be the concern of the authorities to provide sufficient living accommodation. The authorities shall promote social and cultural development and leisure activities.” (Source: Article 22)

However, this task could be done better. This report shows that the economic scope and impact of T&R is not perceived as such. It also demonstrates that the sector is strongly interwoven and connected with many other sectors and policy domains: nature, health, infrastructure, spatial planning, water, mobility, quality of life, health and welfare. Because of this high level of interdependence of T&R with other sectors, all governments are therefore asked to adopt a comprehensive approach and facilitate good coordination with other sectors. It is also important to think and act together with T&R and provide support for new initiatives.

The advice for the national government is to reduce the gap between it and businesses by taking T&R seriously as an industry, to invest more emphatically in expert knowledge about and of T&R in the national government, to anchor T&R in a logical place within the national government and to take control. To date, good coordination is lacking, and crucial choices are too often left to provinces, municipalities and other decentralised parties without a clear assessment framework. The national government is asked to emphatically take up the gauntlet. A final recommendation from this report is to reform the tourist tax system so that positive social impact is encouraged and negative impact is taxed.

Provincial government also needs to reduce the gap with businesses and be more visible. Procedures for subsidiary applications

should be as simple as possible and should not be suddenly reversed. In addition, it is important to work together on a long-term vision for T&R and to take the sector into account in spatial economic policies.

Municipalities can assist businesses navigate municipal structures. In addition, it was suggested that the risks involved in organising events and activities should be better distributed and that there should be shared responsibility between the municipality and businesses. In addition to having a clear vision of tourism, municipalities are asked to use tourism taxes to encourage quality.

What is required from stakeholders?

Industry associations are asked to bring people together, to lobby at all levels of government and to facilitate cooperation with other relevant networks. Some business have a need for ‘differentiation’. Education and knowledge institutions must try to keep up with practical developments, offer as much knowledge and expertise as possible, and think along with innovations. Banks are asked to actively think along with businesses and to try to understand the sector better. In addition, it is important to build long-term partnerships and not let businesses down in difficult times.

What can the sector itself contribute?

The organisations and businesses who took part in the survey do not just look at others. They mention that they themselves can contribute more to the social value of the sector by focusing on corporate social responsibility. It is also important to intensify contacts and cooperation with other companies and to develop and share knowledge with each other.

Appendix 1 - Government and tourism & recreation

This appendix explains the role of central government, provinces and municipalities with regard to T&R. Where and how are things regulated in this sector and who has what role? This is a summary of an extensive explanation of this topic in the advisory report 'Desirable Tourism - Capitalising on Opportunities in the Living Environment' by the Council for the Environment and Infrastructure.

The State

Tourism is primarily the responsibility of the Ministry of Economic Affairs and Climate Policy (EZK), but due to decentralisation, provinces and municipalities play the largest role in policy-making in this area. However, EZK is concerned with promoting tourism and has invested in promoting innovation in the sector via a Green Deal and an innovation programme of the Foundation for Innovation in Recreation and Space (Stichting Innovatie Recreatie en Ruimte, STIRR). The real policy commitment of the EZK is limited to funding the NBTC and a few officials involved in tourism.

Official involvement is therefore limited and other departments with relevant files that link up with tourism, such as mobility, housing, nature, spatial planning, culture and heritage or the environment, pay even less attention to the sector. The Lower House of Parliament only holds a General Consultation (AO) on tourism once a year. This is very limited compared to other sectors such as agriculture, which is only half the economic size of tourism. When the government and the Lower House of Parliament did give some thought to tourism, this attention was mainly focused on the less positive consequences of tourism, namely tension and nuisance caused by overtourism, decaying holiday parks and regulations regarding holiday rentals.

Provinces

Provinces are responsible for spatial economic policy in which tourism is an important theme due to its economic importance. Often, tourism falls under the economy portfolio, but because tourism is linked to many other subjects such as nature, agriculture, culture and industry, this division is changing. Since the policy goals of various departments often do not coincide, much depends on the weight given to certain aspects, with economic development often taking precedence.

In the provinces, guidance is realised through an environmental strategy. This involves setting spatial conditions for recreational and tourist development in an environmental regulation. In addition, provinces often develop a separate vision for tourism and recreation as a whole and some provinces fund studies and plans focused on specific themes such as vitality of residential recreation. ON a national level, provinces work together with NBTC in the 'storylines' that connect places with a common theme in different provinces. However, the Interprovincial Consultation (IPO) does not have an administrative consultation on tourism. At the official level, consultations and cooperation take place five times a year in the leisure network and there are also official consultations on the vitality of holiday parks and on route structures. The province also plays an important role in promoting regional cooperation. Various provinces try to stimulate partnerships, knowledge development and innovation through investment programmes, subsidies and guarantee or development funds from which businesses in the province can borrow. Other provinces work with regions on concrete policy, promotion and product development.

Municipalities

The role of municipalities in tourism management is, on the one hand, to stimulate and facilitate tourism initiatives, such as sharing knowledge and connecting entrepreneurs, and on the other hand, to formulate frameworks within which tourism development may take place. In municipalities, too, tourism is often included in the economic department, because it is seen as an opportunity for economic development: promoting the growth of employment and spending in the local economy are the main priorities. Tourism policy is formulated and laid down in a vision or development framework in which attention is paid to the diversity and quality of the offer (level of facilities), the accessibility and the impact that a specific development has on the current infrastructure structure (mobility) or protection of nature areas.

The policy commitment to tourism varies among municipalities, depending on their size and tourism content. Usually, municipalities take a facilitating and reactive approach to initiatives by

businesses. Enforcement of the rules that tourist activities must adhere to, such as to prevent nuisance and/or damage to the environment, is often necessary, but municipalities generally do not enforce this sufficiently. There is often a lack of carrying capacity and finances, as well as the necessary knowledge. In addition, there is often competition between neighbouring municipalities, and the close proximity of governments and businesses can also be an obstacle. Municipalities usually involve the living environment in their tourism policy to a limited extent, while tourism 'success' is strongly related to the quality of the living environment, the quality of life (think about the level of facilities) and mobility in the municipality. Tourism can also be used to achieve broader social goals such as boosting the level of supply. Businesses are usually involved by municipalities in drafting tourism policies. When residents are involved, it is mainly in the phase of policy formulation and not policy realisation. Here, too, municipalities with a more developed tourism sector more often talk to residents about the implementation of policy or conduct research among residents.



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