Agenda
Conscious Destinations

Colofon

Preface

The tasks for the Leisure, Tourism & Hospitality – the hospitality domain – are large.
The domain grew until the Covid crisis worldwide, where it generated 10% of the global GDP. Until the Covid pandemic, we also saw strong growth of the domain in the Netherlands. This growth generated considerable money (91.2 billion in turnover and more than 800,000 jobs). The domain earned just as much money in the Netherlands in 2019 as in the construction sector and twice as much as in the agricultural sector. The Covid crisis showed that the hospitality domain is of great value not only economical, but also social.
Due to consumer demand, the domain worldwide and in the Netherlands is expected to recover quickly and to experience further growth. Increasing complexity and dynamics present the domain with a major transition task, in which ecological upper limits and socio-economic lower limits will be encountered. The knowledge and educational institutions in the hospitality domain have a qualitative research capacity to help the domain more intensively with its tasks with expertise.

CELTH is therefore investing in the development of an integrated knowledge agenda: the Agenda Conscious Destinations (ABB). With the ABB, CELTH provides space for state-of-the-art applied and academic research and provides building blocks for sustainable curriculum development in education for the professionals of tomorrow.

In the ABB, the conscious destination comes first. CELTH emphatically opts for the destination level because that is where all the different sub-sectors and actors come together. In the view of CELTH, a Conscious Destination focuses on the social value of the hospitality domain. The aim is to achieve an outcome in which the hospitality domain has the greatest possible social, ecological, and economic impact and which leads to the highest possible quality of life, experience and work.

The ABB acts as a guideline for the knowledge and education partners of CELTH to develop new relevant knowledge and skills for destinations, in line with the issues from Perspective 2030. With its agenda, CELTH also implements the advice 'Valuable Tourism' of the Council for the Living Environment and Infrastructure (Rli), that the current political and policy-related attention in the Netherlands is disproportionate to the great economic and social meaning of the hospitality domain and that the current knowledge base is small.

We challenge partners –entrepreneurs, governments, knowledge and educational institutions, DMOs and residents(organisations) – to be inspired and to invest and thus to strengthen the much-needed knowledge foundation under the hospitality domain.

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Content

Introduction

There is a great need for knowledge and research in the hospitality domain – the whole of the domains of tourism, recreation, leisure, hospitality, and events. In the recommendation *Valuable Tourism (Waardevol Toerisme)* (2019),[1] the Council for the living environment and infrastructure (Raad voor de leefomgeving en infrastructuur, Rli) concludes that the current political and policy focus in the Netherlands is not proportionate to the large economic and social meaning of the hospitality domain and that the current knowledge base is small. The Rli takes the view that knowledge is the foundation for qualitatively good policy formulation and therefore recommends the implementation of a multi-year agenda for building up and maintaining a strong knowledge infrastructure.

CELTH, the Centre of Expertise Leisure, Tourism and Hospitality, is one of the 30 Centres of Expertise in the Netherlands. The purpose of Centres of Expertise is to stimulate the collaboration concerning knowledge and research between universities of applied sciences and partners in the professional field. CELTH is the only Centre of Expertise within the hospitality domain and is therefore the structurally independent knowledge and research partner for stakeholders in the hospitality domain, at regional, national, and international level. In CELTH, the Breda University of Applied Sciences, NHL Stenden Hogeschool, and HZ University of Applied Sciences collaborate on project basis, with the support of other knowledge partners.

CELTH has translated the Rli's recommendation for a multi-year knowledge agenda into the "Agenda Conscious Destinations (Agenda Bewuste Bestemmingen, ABB). The ABB serves as a guideline for the knowledge and education partners of CELTH to develop new, relevant knowledge and skills for national and international destinations. This knowledge enables companies, governments, knowledge institutes, and other stakeholders to deal with the increasing complexity and dynamic in the hospitality domain. In addition, with the ABB – from its connecting and facilitating role – CELTH offers space for state of the art applied and academic research, frames the perspective with which funding can be accessed, and provides building blocks for sustainable curriculum development in education, for the professionals of tomorrow. With this, CELTH offers a lot of added value for the position of education in the hospitality ecosystem.

Together with its (knowledge) partners, CELTH helps to distribute the philosophy of the ABB in both the internal network (education and research) and the external network (companies, governments, knowledge institutes, and other stakeholders), at regional, national, and international level. CELTH does this through:

- Active knowledge sharing and exchange of the philosophy with the internal and external network;
- Structurally setting out regional, national, and international calls to the external network to collaboratively develop multi-level research projects;
- Inviting schools and universities (secondary vocational education, higher professional education, and universities) to participate in the development of these research projects.

On the next pages, we will elaborate on the philosophy of the Conscious Destination and how this leads to prioritising knowledge requirements. However, we will first describe the boundaries of the hospitality domain as determined by us.

In our online interactive visual we present the headlines of the ABB.

Afbeelding 1. Interactieve online visualisatie Agenda Bewuste Bestemmingen

1. Boundaries of the hospitality domain[2]

The domain has many different names; after the old name of 'Tourism and Recreation' came terms like 'Leisure Economics', 'Hospitality Economics', and 'Visitors Economics'. These new concepts were introduced to indicate that tourism and recreation are a wider domain than the lodgings, other accommodations, and bicycle routes that are the first associations people have. The downside of the new definitions is that they explicitly place the domain in a specific corner of the economy. That is a limitation, because the domain also has a lot of social, spatial, and cultural aspects, which are of great importance given the current debate about the balance between visitors, residents, businesses, and the living environment. In the ABB, there is a conscious choice for the term **Hospitality Domain**. As well as a clear choice not to apply strict boundaries to this (working) definition.

Why? As stated, the hospitality domain is strongly interconnected with many different components of society, the living environment, and the economy. In *Perspective 2030* (NBTC, 2018)[3] it is asserted that tourism is a means for making an explicit contribution to solutions for larger social challenges, with references to challenges like increasing the habitability, realisation of sustainability objectives, and the creation of employment opportunities. In other documents, links to other social themes are made, for example to accessibility and heritage in the recommendation *Valuable Tourism* (Rli, 2019). For the ABB to show sufficient consideration for the interconnectedness with all of these sectors and questions, a conscious choice is made to not impose strict boundaries on the domain. This creates the necessary (research) space for researching in particular that interconnectedness and those links. Moreover, it creates space for adapting to changes and social challenges.

Given this broad interpretation, we define the hospitality domain as follows. The hospitality domain is a broad domain, which places the business and leisure visitor and their activities, and the resident and their leisure activities at the centre. They are served by a broad palette of both private and public parties. A visitor usually does not visit for the purpose of one single product, but due to the interplay between accommodation, hospitality, entertainment, landscape, shops, and transport, combined with the natural and/or cultural environment. Therefore, In the hospitality domain it is not about the offer of one product but about a composite whole, involving various providers. The natural and cultural environment, the physical layout, and the social structure of locations are determining factors for the proper functioning of the hospitality domain – even if these places are not solely intended for the hospitality domain. This shows how strongly the hospitality domain is interconnected with many different components of society, the living environment, and the economy.

The hospitality domain evolves around the business and leisure visitors, the leisure activities of residents, and the businesses and public organisations that supply products, services, and locations to these visitors and residents, and the environment in which all of this takes place.

2. Why focus on "Conscious Destinations"?

The domain is all about visitors and residents. Zooming in on the visitor side, it becomes clear that the global growth of tourism in recent decades has been enormous. In the Netherlands, tourism also saw a strong increase, driven by a growing demand from the market. Practically every location tries to draw in tourists, whether it is a city, town, region, island, or nature preserve. Usually, they focus on visitors from their own city or region, or visitors from (far) further away. Governments, entrepreneurs, and regional marketing organisations are working on the development of tourism at different scale levels, in order to create appealing destinations for visits and stays. The growth of tourism has resulted in high pressure on specific locations, which leads to a demand for more suitable strategies to consciously respond to that development and optimise the social value. On the other hand, there is a sense of low pressure at locations that are further outside of hotspots, locations that are not automatically found by visitors. In these locations, there are often great ambitions for development into a destination to visit and stay at. Here too a demand for suitable strategies exists.

Besides the questions concerning tourism, the hospitality domain also plays an important role in the daily life of residents. Outdoor recreation, sports, hospitality, culture, and events are facilities that are essential to an appealing residential and living environment and increase the habitability of an area for its residents. Part of these facilities are shared with visitors; others primarily serve a local function.

The Covid-19 pandemic and associated measures have had a huge impact on the hospitality domain. International travel came to an almost complete stop and far-reaching lockdowns quite literally put the domain under lock and key. This made the great social value of the domain painfully apparent: people lacked opportunities to have fun and relax, both in their daily lives, in their living environment and during their holidays. It resulted in a trend break of unprecedented proportions. After the first lockdown, in the spring of 2020, the domain worked and lobbied hard for recovery. With varying success: some subsectors were hit harder than others. Since the spring of 2020, the domain has had to deal with ups and downs in consequence of the easing and reimposing of restrictions. Simultaneously, the expectation is that recovery is a matter of time. The question is not 'whether' the domain will recover, but primarily 'when' and also 'how'. This 'how' is very important because it requires more than just recovery in the sense of back to the 'old normal', to before the corona crisis. As far as CELTH is concerned, the intention should be for recovery to go hand in hand with the build-up of resilience against future crises, the stimulating of sustainability transitions and responding to long-term challenges. The impetus for this was made, among others, in CELTH's scenario study, where four possible future perspectives for the period after the Covid-19 pandemic were sketched[4].

For a long time, the tourist part of the hospitality domain worked with a focus on economic and quantitative objectives – and it still does. 'More visitors, who stay longer and spend more' was the adage. And no surprise, because for governments, tourism usually comes under economic affairs, employment is an important issue, the domain contributes to the level of facilities, and revenue and profit are important drivers for entrepreneurs. However, with increasing tourism there are also downsides being exposed, including nuisance and hinder caused by droves of people, changing and one-sided shops, homes being taken off the housing market for the purpose of renting out to tourists, increasing housing prices, increasing pressure on the ecosystem, a negative impact on nature and the environment, traffic congestion, high costs for law enforcement and management, et cetera. In Europe, it has even happened that residents of hotspots are not only annoyed by tourists, but that even their tolerance limits are being exceeded, resulting in protests, hotel stops, and countermeasures. It is logical that action is being taken where excesses arise. But what is needed, besides *responding*? How can the affected *anticipate*?

Simultaneously, ever more attention is given to the positive impacts of the hospitality domain (see, among others, *Perspective 2030*[iii]; *Valuable Tourism*[i] and *Social Value of Tourism (Sociale waarde van toerisme)*.[5] After all, the domain not only has significant economic, but also a distinct social value, for example for the living environment. The hospitality domain generates additional support for the facilities level in regions and contributes to the preservation of cultural and

natural heritage and safety. In the end, the domain has great social value, for example regarding to the development of regional pride and identity, the interaction between residents, visitors, and entrepreneurs, and in the area of themes like inclusion, diversity, and social cohesion.

In the ABB we are opting for the *destination level*. At destination level, the various subsectors of the hospitality domain come together, with some subsectors focussing more on residents and others more on visitors. At the heart of it is hospitality and the creation of value. At destination level, the domain interacts with its environment; this is where synergy and/or competition with other sectors arises and where the full complexity of the hospitality domain shows itself. At this destination level, the domain can play a part in social transitions and challenges, in interaction with other domains. It should be noted here that destinations do not stand alone but also interact with other destinations. Here, transport and logistics form the physical connection between destinations.

At destination level, there is a great demand for knowledge development regarding to questions like: *Why* are we focusing on the hospitality domain? *Who* does the destination belong to? *Who* profits from the hospitality domain and in what way; where exactly are the (social) costs and benefits found? How do we ensure that the destinations retain a certain *balance*? How can we go from responding to accomplished facts to anticipating what is yet to come? At a conscious destination, these questions are approached as follows:

Conscious Destinations

A Conscious Destination is thought out. There is a story, vision, strategy, data and knowledge, and skills to deal with them. A Conscious Destination is proactive. There is leadership, initiative, and innovation, which contribute to a high level of organisational capacity. The (possibly contradictory) interests are consciously dealt with and there is alignment between stakeholders. A Conscious Destination is also adaptive. People are sophisticated, sensitive to change up close and far away; people are innovative and can, substantiated by data and expertise, consciously anticipate or deal with developments such as global network society, the globalising economy, technological developments, and natural processes. People know that this requires the right circumstances, so that destinations can remain resilient.

CELTH really understands the importance of conscious destinations, but also knows that the development of the hospitality domain can be approached in different, diverse ways. The table below highlights several approaches. Each approach has a different way of looking at the hospitality domain. In every approach, the stakeholders (such as residents or companies) look differently at visitors, residents, developments that are being driven by the hospitality domain, what makes the domain into a success, etc. What approach is being followed (consciously or

subconsciously) is person and organisation dependent. As such, approaches can exist side by side and cause different views and perspectives, and possibly clashes and conflicts as well.

CELTH sees that the approach '*optimising the domain*' is gaining more and more support and expects that this will become the predominant approach in the (near) future, not only in the Netherlands but globally. There is increasing social and political pressure for reconsidering approaches that result in growth or that see the hospitality domain solely as a threat. The conscious choices at the base of the optimisation approach align well with the vision for Conscious Destinations.

Different approaches of the hospitality domain	The domain as opportunity	Growth of the domain as the goal	The domain as a threat	Optimising the domain
Attitude towards hospitality domain	The hospitality domain as a niche activity, as something unique, promising, as opportunity	The hospitality domain as full domain, as a goal, as engine for employment	The hospitality domain as a threat, cause of nuisance (culprit)	The hospitality domain as a means (as regenerative force) and as integral theme
Attitude towards destination	Destination as untapped, rough diamond	Destination as exploitable source	Destination in danger	Destination as (potential) cohesive, vital, and resilient system
Attitude towards the visitor	Unique occurrence, a phenomenon	Walking money bag	Source of nuisance (culprit)	Stakeholder, temporary (co-) inhabitant
Attitude towards the residents	Incidentally confronted with tourists: leads to interest, wondering, and (for some) seeing potential	Profits from the hospitality domain through income and employment	Experiences nuisance or hinder (victim)	Stakeholder, joint user of the leisure offering, experiences pros and cons
Attitude towards development	The hospitality domain as indicator of change or transition-in-progress	The hospitality domain as growth diamond: focus on numbers, euros, more is better, 'boosterism'	The hospitality domain as a problem that must be stopped	Development of the hospitality domain is a delicate subject. Approach like a transition process: consciously guiding towards new future situation. Conscious of actual impact and price
Attitude towards success (KPIs)	N/A	Growth	Impact	Optimisation of the social value
Attitude towards education programmes	No specific programmes	Educating for the growth of the domain	Educating for the management of the domain	Educating for the social value of the domain

Table 1. Different approaches of the hospitality domain

3. What choices does a Conscious Destination make?

A Conscious Destination places the social value of the hospitality domain at the centre, realised through striving for an as positive as possible economic, social, and ecological impact (in other words, the Triple-P values *people, planet, and profit*). These impacts are experienced by residents (and directly affect their quality of life), visitors (in the quality of experiences), and employees and companies within the hospitality domain (quality of work).
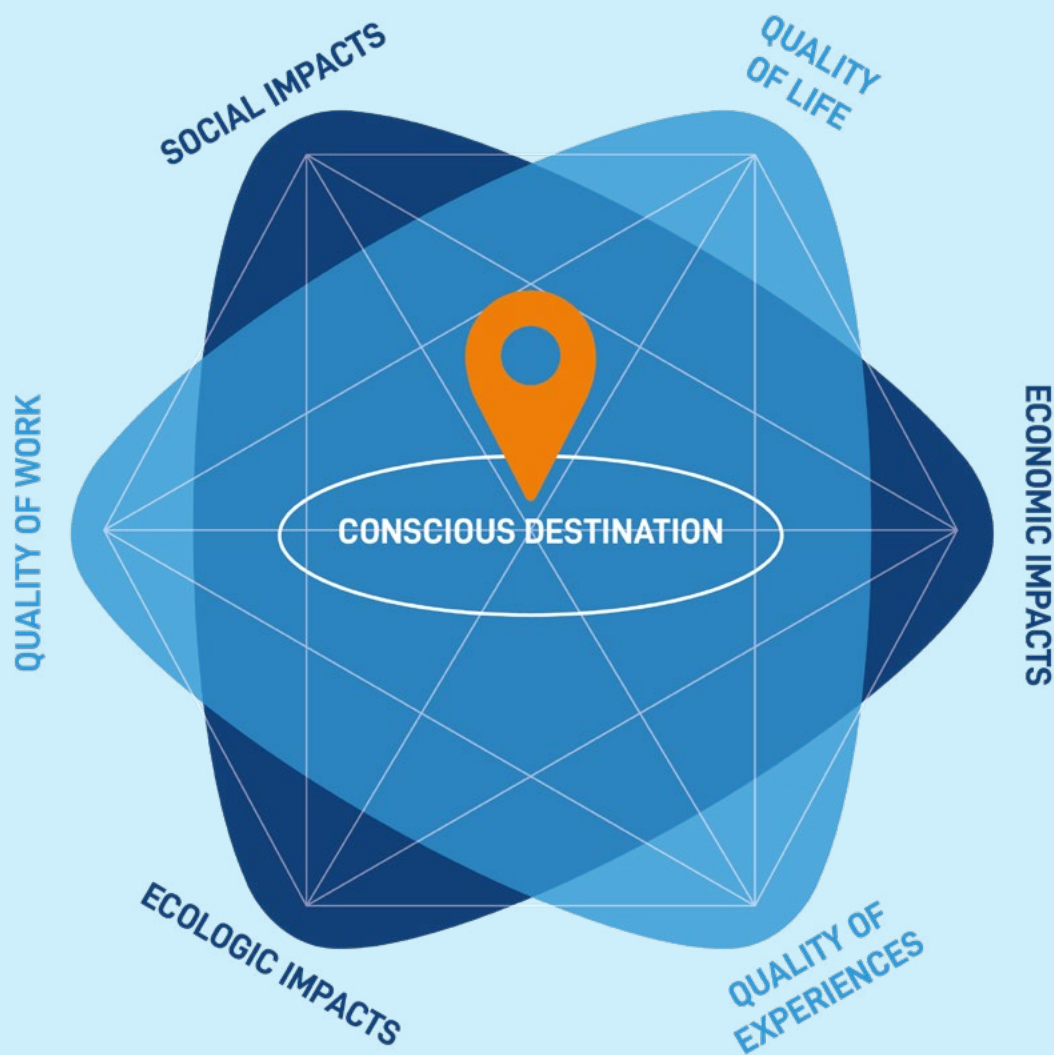
Figure 1. Conscious Destination. Based on Koens et al., 2019[6]

Social impacts of the hospitality domain

A Conscious Destination places hospitality at the centre and in doing so is conscious of the influence of the domain on society; it is conscious of the social processes, such as identity formation, estrangement, and inclusion and exclusion. A Conscious Destination understands the present social structures, for example which groups profit, and which groups carry the social burdens. That knowledge is utilised to facilitate the contribution of the hospitality domain to solutions for broader social questions.

Economic impacts of the hospitality domain

Economic impacts (too) often focus only on the financial profit, usually measured over a relatively short period of time. A Conscious Destination adopts a broader perspective, with attention for both positive and negative economic impacts, in the short and long term. This includes attention for the impacts for directly involved stakeholders (including profit), but also for the costs and returns of the destination as a whole.

Ecologic impacts of the hospitality domain

The natural environment is traditionally one of the foremost reasons for visiting destinations. Simultaneously, the hospitality domain causes waste and noise nuisance, and increased water usage which can lead to reductions of and/or damage to the quality of the natural environment. A Conscious Destination therefore searches for ways in which the hospitality domain can contribute to appreciation for, preservation of, and strengthening of this environment. In addition, mobility is an essential component of the hospitality domain. A Conscious Destination searches for fundamental solutions to minimise the climate consequences of mobility.

The above impacts affect quality factors for various groups of stakeholders.

Quality of life (residents)

Conscious Destinations use the hospitality domain as a catalyst for the sustainable development of appealing cities, areas, and regions, where the domain can widely contribute to the habitability and the preservation and the development of facilities. In addition, the destination focuses on the prevention of negative impact of the hospitality domain on the quality of life of residents, such as avoiding nuisance.

Quality of experience (visitors/users hospitality domain)

Conscious Destinations safeguard the experience of residents and visitors because the hospitality domain evolves around offering experiences. Conscious Destinations focus on creating meaningful experiences, based on the distinguishing ability of the destination – the

unique interplay of people, history, culture, nature, and landscape of a destination. In the offer of experiences, these characteristics and cherished and enhanced.

Quality of work (entrepreneurs and employees)

The domain has been coping with shortages in the employment market for years, caused on the one hand by social changes and on the other hand by the inability of employers to sustainably bind employees (incl. volunteers) to them. The operations of providers are currently often based on the flexible, cheap use of youths, partly due to the small margins in the revenue model. Conscious Destinations strive for a high quality of work, this requires quality of entrepreneurship and management, with attention for good employership and talent development.

In the optimisation process that characterises a Conscious Destination, all of the above impacts and qualities are consciously recognised and acknowledged in design processes, deliberations, and (political) decision making. The striving for an outcome that gives the hospitality domain as positive as possible social, ecological, and economical impacts and where it leads to the best possible quality of life, experience, and work. It is of course fantastic when adjustments are possible that lead to an improvement of all impacts and qualities simultaneously. However, that will not always be possible. For example, increasing economic impacts by attracting more visitors and/or building a new recreational facility will be accompanied by negative ecological impacts. In the deliberation surrounding such decisions, hard lines can be defined (for example: negative ecological impacts that are simply deemed unacceptable, or a maximum capacity for a location) or an 'exchange' may be accepted (for example: negative social impacts people are prepared to accept as long as the adjustment results in very positive economical impacts). Transparency about the way in which all different interests, impacts, and qualities are weighed is an essential component of the conduct of Conscious Destinations.

Moreover, the system of the destination is continuously subject to internal and external changes, making the search for the optimum a continuous process. This continuous process takes place in a very complex context. That complexity is embedded in the following (following Dewulf et al., 2009[7]):

Multi-level

destination development is affected by factors at different scale levels, which must be adequately considered. At the macro level, there are developments which parties at the local level of individual destinations cannot or can very limitedly affect, but by which they are constantly confronted. They are expected to respond to and anticipate these. Examples include climate change, the whims of the global economy, a pandemic like Covid-19, demographic developments such as ageing populations, and changing household compositions, geopolitical

and technological innovations like robotisation, AI, and blockchain. At meso level, it concerns for example the policy and actions of governments and the laws and regulations imposed to determine the course. Policy choices and their elaborations can have a huge impact on the way in which the hospitality domain develops. At the micro level, it concerns entrepreneurs, (public) organisations, and residents who, collectively or otherwise, start up initiatives, experiments, and niche developments.

Multi-actor

the playing field is filled by a multitude of entrepreneurs, governments, organisations (marketing, culture, associations), education and knowledge institutes, and residents with individual interests. Their actions are variable and not necessarily coordinated.

Multi-domain

the destination is affected by choices in domains, such as economic affairs, culture, sports & leisure, spatial planning, infrastructure, mobility, environmental quality, nature, and ecology. These domains are in turn affected by policy, laws and regulations, procedures, and the operational reality of enforcement and management, each with their own reality and speed.

Multi-timescale

Destination development is affected by factors with varying speeds (Lew, 20148). Slow developments ('stresses', 'slow burns') are things we can see coming and try to predict. Examples include demographic developments (population composition, life expectancy) and consequences of climate change, such as rising sea levels. Fast developments ('shocks', 'fast variable') can sometimes be predicted (for example using so-called 'what-if scenarios') but there will always be uncertainty about how likely it is for a specific shock to occur, when it will occur, in what shape, scope, and capacity it will occur, and what the exact effect will be.

Multi-objectives

destinations are shaped by the agendas and choices of a multitude of parties, sometimes jointly, sometimes individually. A destination must, for example, be habitable, sustainable, loved, and profitable – objectives that do not by definition or obviously go together and create synergy.

Multi-options

there are multiple different paths that can be taken to achieve objectives. Even the definitions of objectives such as 'habitable', 'broad prosperity', and 'profitability' can mean different things to different parties, let alone that consensus exists about the way in which to achieve them. This makes it difficult to create a uniform roadmap with unambiguous choices and certainty about the outcomes.

Multi-context

Each destination must be approached in its own way, specific to its political, economical, legal, and socio-cultural situation. Moreover, this context is constantly changing. Standard solutions are often impossible for the strong mutual dependency of the domain and its environment. Learning from developments and solutions elsewhere however is a real possibility, provided it is not regarded as a one size fits all solution and simply copied but is instead implemented with attention for the specific context.

4. What knowledge is required to arrive at Conscious Destinations?

The above complexity means that 'Conscious Destinations' do not simply arise, while this is becoming increasingly important given the aspired social value. In its recommendation *Valuable Tourism* (2019), the Rli determined that the knowledge base for the hospitality domain is small and that it is necessary to work on a structural build-up of knowledge. With this ABB, CELTH seeks to contribute to the development of knowledge that, according to CELTH, is necessary to arrive at Conscious Destinations.

By developing knowledge on these themes that contributes to solving the challenges, and to better understand how the complete system of the destination functions, CELTH can help destinations to develop into Conscious Destinations. This way, through integral policy and properly substantiated interventions, these destinations can strive for an as good as possible quality of life, experience, and work.

In the ABB, CELTH opts for five core themes: living environment, human capital, organisational capacity, smartness, and leisure offer. These are the themes which, according to CELTH, should currently have priority given the situation in the hospitality domain. Within each of these themes, we identify core challenges. Knowledge development is needed to understand how these challenges can be addressed and to arrive at properly substantiated interventions. The five themes are intended as a structuring principle, but it is important to emphasise that the themes and the underlying challenges have close mutual ties. To illustrate: organisational capacity and smartness are required for solving challenges in the employment market, which in turn can contribute to a better functioning leisure offer with a more positive influence on the living environment.

NB: The ABB is explicitly intended as a dynamic agenda. That means that the stated themes and challenges are subject to change. As the knowledge develops and/or new questions present themselves, the ABB may be adapted to reflect new priorities. As for now, the ABB focuses on the Dutch context, but is also applicable in an international context.

Living environment · **Leisure offer** · **Human Capital** · **Smartness** · **Organisational capacity** · Conscious Destination

The five themes encompass the following:

Living environment

There is a reciprocal relationship between the hospitality domain and the living environment of residents. The domain is part of the living environment and can cause damage to it but also to revive it. The goal of the ABB it to, through the hospitality domain, improve the habitability. This also benefits the domain itself, because a favourable living environment also helps keep the destination appealing for visitors.

Human capital

Confronted with challenges such as facilitating 'Life Long Learning', shortages of qualified staff, finding the right balance in the workforce (youths, seniors, part time, full time, etc.) and the need for new skills (social, digital, sustainability), the parties within the hospitality domain have need for more data and insights concerning the employment market and the possibilities there are for finding, training, and enabling the growth of employees, and retaining them for the domain.

Organisational capacity

Destination development is an interaction of various actors, the most important of which are the private, public, and non-governmental parties, the residents/local communities, and the visitors. Where some destinations are very capable of bringing parties and interests together and to coordinate the collaboration, other destinations see that connections and skills are lacking and some parties are underrepresented. The complexity of destination management, as well as its importance, increases due to the tremendous growth of the domain (tourism, recreation, events, festivals, hospitality), the demand for optimising the impacts has increased.

Smartness

Current, complete, and reliable data at destination level are essential to offer guidance and direction to decision-making and development of, among others, entrepreneurs and policy makers. On the one hand, this theme is about substantive data about demand, offer, and impacts as a basis for all strategic challenges. On the other hand, it is about methods and unlocking knowledge, including optimisation and (national) coordination of data collection, the methods

for it (including AI and machine learning), and the application and communication of data. For this, the possibilities of innovative (smart) technologies must be explored and utilised.

Leisure offer

the offer is the core of the hospitality domain and is thereby an essential component of the ABB. Within this theme there are several important challenges. The making robust of the business model at provider level is crucial for the continued healthy existence of the domain in the long term. The quality of the experience is the essence of the domain; providers want to gain more insight into this experience and the way in which it can be stimulated. Finally, the challenge for entrepreneurs is to integrate the challenges stated in the previous themes into their business model: the increasing of social value and minimising of negative impacts, the strengthening and utilising of human capital, playing a clear and active role in the organisational capacity of the destination, and working in a more data-driven way.

5. Elaboration of core themes CELTH

In this chapter, the five core themes are further elaborated. First, each core theme is defined. Then, the foremost challenges for each core theme are described and the knowledge that is required to work on these challenges is set out.

Living environment

Leisure offer

Human Capital

Smartness

Organisational capacity

Conscious Destination

LIVING ENVIRONMENT

Definition of topic

There is a reciprocal relationship between the hospitality domain and the physical and social living environment of a destination; the domain depends on the living environment, but the domain also has an impact on that same living environment.

The quality of the living environment affects the appeal of a destination. This can lead to visits, causing the visitors and residents to share the physical living environment. For example, they share the use of recreational attractions and facilities, infrastructure such as the road network and public transport, public space, retail and public facilities, such as healthcare and safety facilities. The physical living environment not only encompasses the built-up area but also the natural environment. Nature, landscape, and layout of the space are important aspects of the physical living environment. Space is scarce and the Netherlands is facing significant social challenges concerning climate, energy, nature, living, and agriculture, which each require their own space[9]. The domain also has a major impact on the social living environment. It can contribute significantly to relaxation, enjoyment, stress reduction, reflection, social cohesion, and inclusion in society. The presence of visitors can lead to valuable interactions, a sense of vibrancy and sociability, but also to estrangement.

The quality of the physical and social living environment and thereby the quality of life of residents can both improve or deteriorate through (the impact of) the presence of touristic recreational facilities and visitors. This can be translated into a decrease in growth of the support from society for the hospitality domain. This complex interaction has been given very little consideration to date (_Valuable tourism_ and _Perspective 2030_).

An important note within this theme is that, besides public facilities, private offerings (such as retail, petrol stations, banks, taxis, etc.) form part of the living environment. Moreover, the hospitality sector not only affects the living environment, but it is also part of the living environment itself. After all, the touristic recreational facilities are used by visitors and residents and form the places where interactions take place between both groups.

Optimising the contribution of the hospitality domain to the quality of the living environment, and thereby to the quality of experiences and quality of life

The hospitality domain can place enormous pressure on the living environment. This translates into affecting the habitability for residents, but also into affecting the appeal of a destination. On the other hand, the domain can make an essential contribution to the society. Visitors can generate the mass required for maintaining and improving social infrastructure, and touristic recreational facilities offer relaxation and enjoyment to both visitors and residents. They can also contribute to social objectives, for example by offering possibilities for obtaining work experience (including for people with distance from the job market, students, volunteers, etc.), the stimulating of social cohesion, diversity, and inclusion, promoting health, combatting loneliness, etc. Both sides of the medal can be in effect in a specific destination at the same time. Of course (re)action is required when the pressure is affecting the living environment, but actions can also be taken to further increase the positive impact on the living environment.

Pressure and support

The support affects the experience of pressure in the meaning of nuisance or damage. When a certain lack of support arises, the pressure will become more difficult to bear. Such scarcity may arise, for example, in police allocation, hospitals, general physicians, waste processing, and water usage. Moreover, the Netherlands faces significant spatial challenges concerning climate, energy, nature, living, and agriculture, which will lead to reorganising of the space and thereby changes in support in an area. (Re)actions require a good understanding of the system, including these 'bottlenecks'.

Quantifying and interpreting

For determining and interpreting the interaction and reciprocal relations between the hospitality domain, living environment, the habitability and appeal of locations, and quality of life and experience, a broad range of research methods is required. Determining relations may sound quantitative, but many of the impacts are difficult to quantify and subject to subjective interpretation.

Defining and operationalising concepts

Pressure and support are closely connected to concepts like balance, support, social impacts, development space, 'carrying capacity' and 'transformative and regenerative' tourism and hospitality. The clear defining, distinguishing, and making usable of these concepts – from a systems perspective – is an important challenge within this core theme.

How can the reciprocal relationship between the hospitality domain and the living environment be positively utilised?

In other words: How can the hospitality domain be utilised for improving the quality of life and quality of work, safeguarding the quality of experience and improve the quality of environment? This concerns both combatting the negative effects of the pressure of the hospitality domain on the living environment and the maximising of the contribution that the domain can make to social challenges. For this, it is important to map both the positive and negative effects. Besides the substantive shaping of interventions aimed at this optimisation process, this also concerns explicitly the organisational question: What actors are responsible for shaping and implementing the interventions surrounding the living environment? This question is closely connected to the core theme organisational capacity.

How can we assess and optimise both support and pressure?

The pressure depends on the type of visitors, the type of activities, the visitor density, and the behaviour of visitors on the one hand and the vulnerability of the physical and social environment on the other hand. Moreover, every destination has its own support, which can also result in the pressure being experienced differently. We use the eight elements of support, as distinguished in the Rli recommendation *Valuable Tourism*, to measure support. Six of these concern the physical living environment (mobility, real estate, public space, heritage, nature, and environment) and two of these are social elements (public space and personal living environment). In line with the challenges identified for the core theme 'smartness', the real challenge is to put forward methods for measuring (the interaction of) pressure and support, which are suitable for the local context on the one hand, but on the other hand also facilitate (national) comparability.

Living Environment

Conscious Destination

Leisure offer

Human Capital

Smartness

Organisational capacity

HUMAN CAPITAL

Definition of topic

Attention for human capital within the ABB also arises from the notion that:

> Some residents of a destination are employed in the hospitality domain and in that way, the domain contributes to their quality of work and life. Offering work enjoyment and career perspectives is essential.
> Staff makes an essential contribution to the quality of experiences within the domain. Residents and visitors benefit from that.

The relevant questions regarding human capital at a specific destination (meso level) are strongly affected by developments among local entrepreneurs (micro level) and at the national and international (macro) level, and by the relations between the hospitality domain and other domains. The core challenges, as discussed below, are therefore generic in nature. For the ABB, it is relevant how these challenges manifest themselves within one or more destinations.

From this core theme, a direct link can be made to the education that is provided by the institutes affiliated with CELTH and by other education institutions, including universities and secondary vocational education. These institutes can contribute to the resolving of core challenges by organising research projects (in which students participate as well) and transferring knowledge.

Core challenges human capital

Life Long Learning

In a rapidly changing world, Life Long Learning is a requirement for the hospitality domain to be successful in the long term. This requires employees who take the responsibility to (keep) invest(ing) in knowledge and skills, employers who stimulate those employees and facilitate that development, and educators with an adequate education offer: flexible, adapting to new insights, techniques, and concepts, accessible, with continuous learning lines and the possibility for validating practical experience and (elsewhere) acquired competencies.

Shortage of quantity and qualifications of staff

The hospitality domain in the Netherlands is coping with significant shortages in both quantity and qualifications of staff. Social developments on the one hand and the inability of employees in the domain to sustainably bind staff on the other hand are causing these issues. The employment conditions (in part due to small margins, irregular working hours, and sometimes seasonal work) make the work in the hospitality domain relatively unappealing for qualified personnel, and result in (too much) dependency on youths and part-timers. This leads to vulnerability and problems in the operations of entrepreneurs. Human capital strategies required with attention for the qualitative and quantitative match between offer and demand are needed, including sufficient attention for health and wellbeing and the education and retention of staff. These strategies must fit within the (new) business models of entrepreneurs. The challenge to find and retain qualified personnel is even more apparent in rural areas. These areas often cope with ageing populations and talent being drawn away towards the cities. The regional approach of human capital questions in the hospitality domain then must fit into the broader approach of human capital at the destination.

Need for new skills

Complex and ever faster social and technical developments have a significant impact on the hospitality domain, so that more and new skills are required. New entrants and employees must keep up with fast technological changes and add value to them with the help of their socio-cultural and general skills: 'High Tech with a Human Touch'. In addition, there is an ever increasing demand for knowledge and skills in the field of sustainability.

Required knowledge – priorities

More and better insights and data about the employment market within the domain are required. This concerns the numbers of employees, including the characteristics of the work they do and their own characteristics (gender, age, level of education, etc.), number and type of vacancy, the (mis)match between offer and demand in (regional) employment markets, and the satisfaction

of staff about working conditions and career prospects, from entrepreneurs about the offer on the employment market, and from customers about the (service) level of staff. For the ABB, it is particularly important that data is available at destination level.

With use of the data it is subsequently important to find answers to questions such as:

> What are the requirements for the domain to educate, find, and retain high quality staff? What does this require from employers, education institutes, local and regional governments, employment agencies, and benefit agencies? What employment conditions are important? How can the relatively bad image of the domain among (prospective) employees be improved? How can the regional positioning of education and the public and private sector be strengthened to create a logical and valuable 'employee journey'? How can the essential flexibility be facilitated in a way that fits within a sustainable staff policy?

> What does facilitating 'Life Long Learning' mean for employers, employees, education institutions, and other stakeholders within the domain?

> What are the social and economic impacts of the work the sector is offering? For example, in the field of employment, sustainable employment and career perspective, diversity, inclusion, and opportunities for people with different levels of education, with distance from the employment market, of different ages, etc. What is the impact of the requirements that are being set for employees within the framework of flexibility (long days, seasonal work, constant availability, etc.), and of the relatively poor employment conditions? How can those social and economic impacts be optimised?

> How can it be safeguarded that employees and entrepreneurs have skills that are in demand within the domain now and in the future, in the area of digital and socio-cultural skills and sustainability?

> How does a Human Capital Agenda fit within the hospitality domain within the broad approach of human capital questions at a destination and within policy intentions, for example those set out in a Regional Economic Agenda? How does a Human Capital Agenda fit within the budgets allocated for it?

Organisational capacity

ORGANISATIONAL CAPACITY

Definition of topic

Destination development is an interaction of various actors, the most important of which are the private, public, and non-governmental parties, the residents/local communities, and visitors. Where some destinations are very capable of bringing parties and interests together and to coordinate the collaboration, other destinations see that connections are lacking, and certain parties are underrepresented. The complexity of destination management, as well as its importance, increases due to the tremendous growth of the domain (tourism, recreation, events, festivals, hospitality), the demand for optimising the impacts has increased.

Core challenges

The creation of a balance between the interests of visitors, residents, and companies is the credo nowadays. This requires, among other things:

> A proactive role of the government (multi-level: Europe, national, province, municipality) and of various departments (multi-domain: economic affairs, spatial planning, social affairs, information provision, mobility, infrastructure, etc.) and a processing framework of instruments (policy-related, financial, and legal).
> Proactive conduct of Destination Marketing/Marketing/Management Organisations (DMOs): The use of branding and marketing focused on suitable target groups for a destination, for the purpose of contributing to both the quality of experience and the quality of life. This requires not just a focus on marketing but also on management.
> The private sector adapting to change in line with changing social attitudes and wishes regarding the domain and increasing (police-related) government guidance.
> Engagement of social parties (local residents, residents' collectives, associations, site management organisations, NGOs) in development processes.

Parties do not stand alone in giving implementation to these challenges. In fact: parties are more or less dependent on each other. Therefore, parties will have to engage with each other more and more, seeking alignment, forming a vision for undesirable and desirable futures,

determining policy frameworks, pooling resources, and thereby forming productive coalitions. Aspects associated with this are the formation of strategic (public-private) networks, creating links between scale levels, clear mutual alignment on tasks, roles, and responsibilities, safeguarding the position of the hospitality domain as part of wider area development, and intimately entwining the hospitality domain with other domains (circular economy, energy transition, climate adaptation, habitability, quality of life, and broad prosperity).

Such challenges are notoriously difficult due to the fragmented character of the hospitality domain: many different parties (with many small but fairly few medium and large businesses on the entrepreneurs' side), too little alignment, conflicting interests, limited resources, and fragmentation inside the government and between government layers. While the social interest is felt, the domain continues to receive very little socio-economic and policy-related priority, and therefore little manpower, resources, vision development, implementation strength, and connectivity are made available.

Required knowledge – priorities

> What does the optimal 'destination governance' system look like at destination level? What parties, what roles, what actions play a part? How can such a system be sustainably maintained?

> Who does what at which scale level, and how can both alignment and progress be created? This question is currently very relevant for regional marketing (after all, destinations may overlap), for data (national versus regional initiatives), for policy, and for implementation by governments.

> What does a roadmap for parties to improve organisational capacity step by step look like?

> What policy toolset 'that works' can a government apply to direct the (level of) development, both in quantity (for example, Airbnb) and quality (for example, stimulating sustainability) at destination level, for the purpose of creating the Conscious Destination?

> Circumstances change continuously due to external, autonomous, and sometimes unforeseen circumstances; how do parties adequately and adaptively respond to this?

> There are often very grand ambitions and plans, but often also (too) little manpower and resources. How is the level of ingenuity among parties? How can they take significant steps despite limited manpower and resources?

> How can previously inadequately represented parties, in particular among (specific segments of) residents, be actively and effectively engaged? The domain needs the support of residents, but residents often do not feel they are being involved in the decisions. The new Environment Act (Omgevingswet) requires the engagement of all stakeholders, including civilians. When we take support seriously, residents must be engaged, and we should not just work based on majorities but also show consideration for vulnerable groups.

> How can the hospitality domain be actively and effectively put on the wider agendas: circular economy, energy transition, climate adaptation, environmental vision, broad prosperity, etc.?

> The hospitality domain does not stand alone and must compete with other sectors, for example with regard to (physical) space, public investment, or staff. Investments from the public sector are balanced in relation to challenges in other policy domains, weighing up where investments will yield the best returns (for example informed by work productivity). How can the domain position itself properly in relation to other sectors and social challenges?

Living Environment

Human Capital

Conscious Destination

Leisure offer

Smartness

Organisational capacity

SMARTNESS

Definition of topic

Both *Perspective 2030* and the Rli recommendation *Valuable Tourism*, conclude that there is insufficient (structural) insight into the hospitality domain. There is need for current, complete, and reliable data to offer guidance for decision-making, development, and policy. The core theme Smartness evolves around working on this need for information. Two main lines can be distinguished here:

Need for substantive information

Working on a complete and structural overview of data and information surrounding the hospitality domain, as a foundation for all other core themes.

Methods and unlocking of knowledge

There is also a need for knowledge development with regard to methods for data collection and the application and communication of data. The desire is to arrive at the right match between knowledge requirements (policy questions) and methods, with as much national alignment as possible.

Core challenges

Need for substantive information

The data that is being worked with in the hospitality domain is often fragmented and incomplete. Even basic questions like visitor numbers or the scope of the leisure offer can often barely be answered. That is why, in 2020, the National Data Alliance (Landelijke Data Alliantie) was founded, where parties collaborate on improving the existing data and the development of new data. At the start, inventory was taken as to which substantive themes have the greatest need for knowledge. These themes are:

> *Visitors*: quantity (how many), profile (who), customer journey, and visitor flows;
> *Impact of tourism*: social, economic, and ecologic. There must be clear insight into all costs and benefits;

> Leisure offer, regional match between offer and demand, human capital

Furthermore, the Rli recommendation emphasised that for good policy it is essential to have insight into the pressure and support of tourism at destination level. At destination level, there is a lack of data and insights on all aforementioned topics. When destinations do have this data, it is rarely comparable to the data for other destinations. The challenge is to fulfil this need for information as much as possible, at local and regional level, while safeguarding the comparability and reliability of data. Moreover, it is important for destinations to help with the interpreting of data and the use of data for balancing interests and policy decisions.

Regarding **methods**, the challenge is to develop and test new forms of data collection, for example with the help of data science and big data. It is also important to standardise definitions and research methods as much as possible, to facilitate the needs for regional, national, and international comparison. Dashboards and tools can help to unlock data for parties in the professional field. The question is how these tools can be optimally set up to meet the information needs and policy questions.

Required knowledge – priorities

Need for substantive information

> Instruments for measuring pressure and support at destination level;
> Figures concerning visitors, day visits, and accommodation tourism, at destination level;
> Data about current visitor flows and levels for the purpose of 'live' visitor management (as referred to in the *Action Agenda Perspective 2030 Destination the Netherlands*[10], 1D);
> Impacts of the hospitality domain – the result of all 'costs and benefits', with in-depth consideration of each subsector (as referred to in the *Action Agenda Perspective 2030 Destination the Netherlands*, 1A);
> Knowledge about offer and demand in the employment market for the domain (as referred to in the *Action Agenda Perspective 2030 Destination the Netherlands*, 5B).

Methods

the development of a 'toolbox' of methods (including decision aid) for the main knowledge needs and policy questions, such that destinations on the one hand can choose for the most optimal method in the specific local context while on the other hand there is as much national alignment as possible.

Living Environment

Conscious Destination

Leisure offer

Human Capital

Smartness

Organisational capacity

LEISURE OFFER

Definition of topic

As described in the introduction of this Agenda, the hospitality domain is enormously broad. The domain encompasses visitors and the leisure activities of residents on the one hand and the companies and public organisations that provide them with products, services, and locations on the other hand. This leads to a very broad and varied leisure offer. It encompasses a range of private and public parties: accommodation (from five-star hotel to mini camping), entertainment (from amusement park to cycling route and from museum to event), hospitality and transportation, including the travel industry. In the hospitality domain it is seldom about the offer of one product and almost always about an interplay of many different providers combined with the location they are based in (nature, landscape, urban environment, and living environment). Providers in the domain depend on each other, but the domain is also closely intertwined with many different components of society, economy, and living environment. The core theme Leisure Offer focuses on the activities of private and public providers in the hospitality domain.

Core challenges

Robust business models

> *Recovery after COVID-19 crisis:* The impact of all Covid measures was huge for the whole of the hospitality domain. Since March 2020, some subsectors were completely shut for significant periods of time, other subsectors have since had to cope with significant and less significant restrictions. This resulted in huge economic damage for all providers and their networks: loss of revenue, increasing debts, and lack of investment capacity in the coming years. The huge impact of Covid-19 also shows the vulnerabilities of certain business models. Therefore, in the aftermath of the crisis, it is not just a matter of recovery in the sector, at the same time a strengthening of business models in view of long-term challenges will have to be effected, in order to make the domain more resilient and futureproof.

> *Value creation:* The margins in the domain have been very small for quite some years and the investments in innovating the offer are expensive. This makes the revenue model for private and public providers very vulnerable. It is important to work on future-oriented business

models, which place value creation at the centre and based on which a robust revenue model can be developed. This should take the form of multi-value creation: value for the visitor, social value for the local population, earning potential for the entrepreneur, and as sustainable as possible.

Role of providers within the Conscious Destination

In a Conscious Destination, the providers play a very important role. The knowledge obtained within the previous core themes should therefore be translated into this core challenge. In doing so, we must investigate what role the providers of the hospitality domain can play and what knowledge is required to give implementation to that role.

> As described within the core theme Living Environment, the domain fulfils an important role when it comes to relaxation, enjoyment, stress reduction, reflection, social cohesion, and inclusion in society. In addition, the domain contributes to the physical living environment as well, for example to the habitability, the maintenance of the facilities level, and the support for nature and culture. Within this core theme, we will explore how providers can further increase their social value and – in line with the multi-value creation as discussed above – can also make this measurable in the business model.

> All of society must make the transition to climate resilient, energy neutral, and circular operations; this applies to the providers in the hospitality domain as well. This is an enormous challenge for the domain where travel – both short and long distance – plays a major role, but one that is essential to the long-term existence and survival. In reducing the negative impacts however, it is not just about ecological sustainability but also about combatting nuisance to the local population, negative impacts on the landscape, traffic issues, etc. We are searching for an answer to the question how this can be fitted into the operations of providers.

> As described within the core theme Human Capital, the entire hospitality domain is facing significant challenges around staffing and talent development. Providers must shape sustainable employership in order to deal with these challenges. This requires possibilities that fit within their business model.

> Providers fulfil an essential role in the hospitality domain and thereby have a key position within the organisational capacity of a destination. The challenge is to adequately shape their role within the destination governance system, so that it contributes to the destination as a whole.

> Many providers in the hospitality domain have no experience with data-driven working methods; they have little insight into the data in their own organisation and do not know how they can utilise their own data in conjunction with the data of other parties within the destination. There is a need for insight into how providers can contribute to and profit from collecting more and better data about the hospitality domain.

Quality of experience

the quality of the experience is the essence, the existence right of the hospitality domain. The experience people have when visiting a destination is the result of the actual physical offer (the accommodation, attractions, museum collections, cycling routes, cleanliness of the natural environment, etc.) combined with the experience created by people (staff, but also interactions with other visitors and residents), the stories and the atmosphere. An experience is always subjective, and the interpretation depends on the person having an experience. This subjectivity makes it difficult for the hospitality domain to steer on quality, while in essence that is what it all comes down to. Therefore, methods for measuring the experienced quality and methods for increasing the quality of the experience for different target groups are explored and investigated. Within the ABB, the emphasis is on the way in which the different actors within a destination can jointly realise an as great as possible quality of experience.

Required knowledge – priorities

Robust business models

> *Recovery after COVID-19 crisis:* Insight into the damage caused by the crisis and knowledge about recovery strategies.
> *Sustainable business models:* Unlocking knowledge about business models for the hospitality domain and the development of indicators for measuring (multi) value creation.

Role of providers within the Conscious Destination

> *Increasing the social value:* Knowledge about the different types of social value and the way this value can be increased is essential. It is also essential to develop methods for measuring social value, to gain insight into it. This can help providers to further develop their business model.
> *Reducing negative and increasing positive impacts on society:* Firstly, knowledge about improved sustainability of the hospitality domain must be unlocked, for the benefit of developing innovative sustainable and regenerative concepts and understanding the motivations of both entrepreneurs and consumers. This can lead to stimulating sustainable practices in the hospitality domain and the implementation of change processes to realise these. There is also a need for knowledge about the other negative and positive impacts and the way in which these could be reduced or strengthened. In addition, methods must be developed for measuring these negative and positive impacts, so that the progress can be monitored.
> *Human capital:* It is essential to develop and unlock knowledge about the methods by which sustainable employership can be implemented in the operations of the different types of providers. This encompasses, among other things, the facilitation of Life Long Learning, striving for balance within the workforce, the need for learning new skills, and other human capital challenges.

> *Organisational capacity:* Knowledge about the optimal role of providers within the destination governance system must be developed and promoted. What relationships do they maintain with government, visitors, residents, and other stakeholders?
> *Smartness*: How can providers contribute to and benefit from more and better data about the hospitality domain?

Quality of Experience

Knowledge about methods for measuring the quality of experience and knowledge for improving the quality of the experience for different target groups. For the latter, knowledge about designing experiences is required, for example about suitable design processes and methods and the possible role of technology in shaping (futureproof, sustainable) experiences. Ultimately, in order to be able to contribute to the quality of experience, knowledge is required about the full chain of activities. Firstly, this requires identifying the needs of different target groups, followed by translating those needs into concrete (re)design objectives. Finally, the ultimately realised quality of experience must be measured and analysed.

6. Relevant literature

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