

THE ROTTERDAM WAY

IABx 2019 ON TOURISM



ROTTERDAM
MAKES IT HAPPEN

ROTTERDAM.
MAKE IT HAPPEN.

FOREWORD

Tourism, visitors, visitor economy... these are but a few words. Yet they encompass a whole world of choices, ideas, visions and opinions. Because of this, the subject requires a robust approach!

Rotterdam's popularity has been increasing rapidly over the past few years. Along with this growth in popularity, the city has also been welcoming increasing numbers of visitors. Given that Travel & Tourism is one of the fastest growing economic industries worldwide, now is a crucial moment for cities to make intelligent choices, so that they can face the future with strength and confidence and to make sure that they benefit from these expanding tourism and business-related visits. If we as a city make the right, forward looking choices, visitors can sustainably contribute towards our local economic development and other essential urban features such as sustainability, liveability and the city's very identity.

Over the last 15 years Rotterdam has had the pleasure of working with the International Advisory Board. This is a group of international experts who, periodically and upon invitation from the Rotterdam City Council, share with us their expertise and views on our city in relation to specific themes. In doing so, they provide us with valuable new insights, ideas and a much needed 'outsider perspective'.

Their knowhow and experience with urban development, economics, tourism and marketing, offers relevant added value which helps us ensure that our city stays the energetic, bold, progressive and diverse city that it is, with plenty of room for experimenting and for innovation! In May of this year, the International Advisory Board (IAB) met in Rotterdam to express its vision on the future of tourism in our city. This visit was preceded by research and extensive consultations among stakeholders from within and outside the city. The three days we spent with the IAB were inspiring and intense and led to many new insights. It is a true honour and of great value to be able to, from time to time, connect our city with experts of this level and to be offered the opportunity to rediscover our city through the eyes of 'outsiders'.

All in all, the IAB visit proved a highly valuable experience! In this report, you will find the recommendations put forward by the IAB to the Rotterdam City Council. On the 15th of May 2019, Vice Mayor Kasmi already enthusiastically received a draft version of these recommendations from the IAB. During a well-attended final presentation, he promised that they would be incorporated within the Municipality of Rotterdam's forthcoming tourism and visitor strategy. We look forward to the Municipality's vision on the future visitor economy!

I would like to extend my sincere gratitude to the members of the IAB for their time and knowhow, insights, advice, expertise and passionate reflection on our city. Obviously, I would also like to thank all partners in the city who were involved in welcoming our IAB guests and those who participated in the stakeholder process that preceded the IAB's efforts. It is heart-warming to experience, time and again, your commitment to, and love of our city. Finally, special thanks are due to Vice Mayor Kasmi, who asked us to organise and execute this process for him, and to my colleagues at Rotterdam Partners, who have so outstandingly devised and organised the entire process.

I wish you all a happy read and I promise that we as Rotterdam Partners remain committed to the project follow-up and that we will make sure that the various recommendations will get their rightful place on the city's long-term agenda! We are already looking forward to collaborating with many of you in our combined efforts to translate advice into concrete actions. We shape the future of our city!

Jannelieke Aalstein

Deputy Director at Rotterdam Partners at the time of the IABx on Tourism 2019







CONTENTS

FOREWORD

I. PREFACE

II. TOWARDS A NEW VISION FOR TOURISM

III. FEEDBACK FROM STAKEHOLDERS

IV. IABx ON TOURISM

023 Recommendation I: Develop your vision according to five guiding principles

029 Recommendation II: Assess, define and manage the successes and risks of the visitor economy and share these with the city

033 Recommendation III: Employ a community-led approach to ensure that the visitor economy contributes to community wellbeing

038 Recommendation IV: Take a direct leadership role through bold, integrated and city-wide decisions to ensure that the visitor economy contributes to the city's wellbeing

V. IAB MEMBERS

VI. EPILOGUE



I. PREFACE



The city of Rotterdam is booming. Not so long ago, it might have been seen as the 'ugly duckling' of the Netherlands, but over the past few years the world has discovered that our city has become a unique, bold and authentic destination. This new popularity is bearing fruit: new residents are setting up homes in the city; international companies want to establish businesses here; and the numbers of international visitors, tourists and business travelers are all increasing.

This has sparked a sense of pride across our city. But at times, the changes can also feel a bit confusing. It is no coincidence that towards the end of 2016 the VersBeton comment platform published a book called Help, we are popular! ('Help we zijn populair! Rotterdam stad in verandering'). Rotterdam is still getting used to being somewhere people really want to visit.

The effects of success are visible across the city and many areas are doing much better than they were a few years ago. However, there is still work to be done. Unemployment has shrunk rapidly in recent years from 12.6% in 2014 to 6.2% in 2018. But it is still much higher than the average unemployment rate in the Netherlands' other major cities, and across the country as a whole. The challenge for tourism in the future - just as for the rest of Rotterdam - is to sustain and build on our success.

Tourism - and how it is perceived - has also changed dramatically in the last few years. There have been huge increases in visitor numbers at some popular locations (often described as 'overtourism'), combined with new developments in holiday rentals and other aspects of the sharing economy. As a result, tourism is no longer always seen as something positive.

In the words of Anna Pollock, a member of the IABx on Tourism: 'Tourism is intrinsically neither good nor bad. It has the capacity to enrich lives and communities or diminish and damage them. It is an instrument for creating benefit: the means not the end.' Until recently, discussions about overtourism in the Netherlands were mainly restricted to Amsterdam. The robust growth of tourism in that city, combined with very visible impacts of gentrification, meant that the 2018 local elections were characterised by several key themes: overcrowding, the spread of tourists, and how to keep the city accessible for everyone. Various national and international newspapers wrote articles about how the city was overcrowded, and investigative journalist Floor Milikowski recently published a book - Who owns the city? - with the ominous subtitle - The struggle for Amsterdam. ►



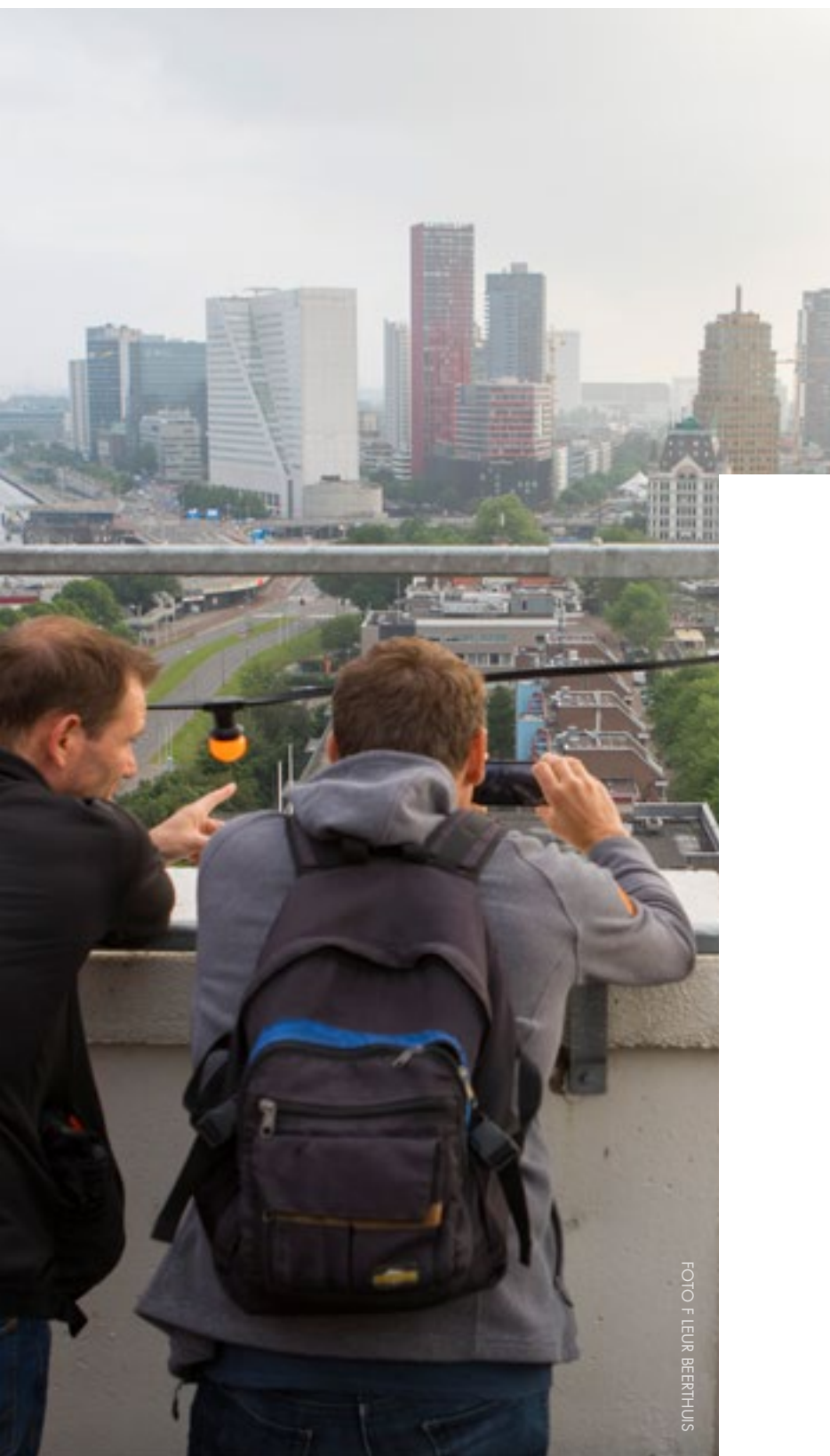


FOTO F. LEUR BEERTHUIS

LL

**TOURISM IS
INTRINSICALLY
NEITHER GOOD
NOR BAD. IT HAS
THE CAPACITY TO
ENRICH LIVES AND
COMMUNITIES
OR DIMINISH AND
DAMAGE THEM.**

LL

Early 2018, national politicians began to address the issue of overcrowding in Amsterdam. Several motions urged State Secretary Keizer to undertake more decisive action. These motions focused, among other things, on a revision of the objectives of the National Bureau for Tourism and Congresses (NBTC) and the development of a national 'Tourism Perspective'.

The discussion about tourism in Amsterdam has evolved into a national debate, which has also attracted attention in Rotterdam. In Rotterdam, the number of visitors is growing fast too, and although the attitude to tourism here is not as negative as in some other cities, our inhabitants are already wary of losing the city's authentic character. During a yearlong participation event called 'the Talk with the City', respondents said they were proud of their city's success, but added: 'Tourists are beneficial for the economy, but we have to steer clear of the situation in Amsterdam, where tourists have taken possession of the city. The city must remain ours!' This statement makes it clear that now is the right time for Rotterdam to make intelligent decisions about the role of tourism in our city's development.

We find ourselves in a fortunate position; the city is doing well and tourism is definitely flourishing. This has led to a growth in employment and income for the city's residents, and also to lively streets and the city as a whole feeling like a better place to be. The ugly duckling has become attractive. Yet we are also a long way from needing to fear being overrun by tourists, as other cities have been. We still have time to learn from those cities and make the right choices.

Tourism in Rotterdam has the potential of being more than just a topic bogged down in discussions about liveability versus economic growth. In Rotterdam we want tourism to be something that contributes to our city's many ambitions. Our residents want this too. They are proud of their city's rising popularity. Our aim is to ensure they stay proud. ●



FOTO ADRIËNNE WILDEMAN





II. TOWARDS A NEW VISION FOR TOURISM



Over the last years, Rotterdam Partners, which is responsible for the international positioning of Rotterdam and attracting tourism and conferences to the city, has observed a shift in the way travel and tourism is perceived.

For a long time, a destination judged its success according to how well it could grow the number of 'International arrivals'. And for years these numbers have been increasing rapidly just about everywhere - in the Netherlands, in Western Europe and all over the world. There are many reasons for this, all of them underpinned by continued worldwide economic growth and the increasing availability of more affordable transport and accommodation. The emergence of the platform economy has transformed travel so much that a city trip is now only a few clicks away on a mobile. And growing numbers of people from emerging economies like India and China are entering the middle classes and earning enough money to travel, first domestically, but increasingly internationally as well. The emergence of these markets has been dubbed 'the rise of the next billion travelers'.

In essence: travel has become more accessible to more people.

The United Nations World Tourism Organisation (UNWTO) summarised these trends in a 2014 report, that also predicted a rise from 1.2 billion travelers that year to 1.8bn by the year 2030. By 2018, the UNWTO reported that the figure had already reached 1.4bn, some two years ahead of schedule. At the same time, the inhabitants of some of the cities experiencing the biggest growth in numbers have started to express concern at the effects these growing numbers of visitors are having.

Amsterdam, Barcelona and Venice are some of the best known examples. And though Rotterdam doesn't get anything like the number of visitors these places receive each year, our citizens have already been sharing their concerns. ►



FOTO ADRIËNNE WILDEMAN



LL

**TOURISM IN
ROTTERDAM**
SHOULD BE
OF BENEFIT
TO ALL OF
OUR CITIZENS.

LL



FOTO RIK VAN DER KROON

In light of all this, Rotterdam Partners presented a positioning paper to the newly installed Vice Mayor Said Kasmi (Culture, Education & Tourism) in the early summer of 2018. In this paper, we laid out many of the above concerns, as well as the fact that tourists have an impact not only on the economy but also on the liveability, ecology and identity of a place. This impact can be positive, but only if the city develops a vision and a strategy that sets out what it wants to achieve and how tourism should be developed to help do this.

MAIN QUESTIONS

The main questions we proposed in that positioning paper were:

- What effects do we want tourism to have on our city?
- (How) does that differ per area, neighbourhood and even at street level?
- What do we need to do, or prevent from happening?
- How do we nurture the unique DNA of our city while doing that?

Having made the case for a new vision for tourism in Rotterdam, the Municipality, together with Rotterdam Partners, created a process designed to develop it. This process began with an initial memorandum, in which the Municipality laid out its first thoughts on the future vision for tourism. The starting principle for that memorandum was that 'Tourism in Rotterdam should be of benefit to all our citizens'.

FOUR MAIN AMBITIONS

This starting principle was then developed into four main ambitions that the Municipality felt tourism should contribute towards:

1. Tourism should contribute to employment and income for the citizens of the city.
2. Tourism in Rotterdam should contribute to a more sustainable city.
3. Tourism in Rotterdam should lead to dynamic and liveable residential areas.
4. In Rotterdam we want to stay true to ourselves and share our pride in our city.

Rotterdam Partners was then asked to support the development of this process by first involving local entrepreneurs and stakeholders; and then by bringing together a group of international tourism experts through an International Advisory Board.

We first organised a series of working sessions, inviting around 50 different local stakeholders from all across our city's tourism sector. They were asked to reflect on the ambitions the Municipality had put forward. A summary of this process and the findings are presented in Chapter III.

Then, in May of 2019, Rotterdam Partners organised an expert edition of the International Advisory Board, bringing together seven international experts in the fields of tourism, urban development and social geography. An overview of this process and the findings and recommendations of the International Advisory Board can be found in Chapter IV.

Using these findings and recommendations, the Municipality will now work towards creating a vision for tourism in Rotterdam. This vision will be presented to the Rotterdam City Council in the autumn of 2019. ●

FOTO IRIS VAN DEN BROEK



III. FEEDBACK

FROM STAKEHOLDERS





The entrepreneurs and businesses in and around Rotterdam are the foundation of the visitor economy - they make the city somewhere people want to visit in the first place. Acknowledging their importance should therefore be the starting point of any new vision for tourism.

Various stakeholders were invited to represent a diverse range of businesses and organisations. In order to structure the stakeholder pathway, the choice was made to cluster them into four distinct groups: Off the Beaten Track, Travel, National Experts and Well-known & Well-liked.

The Off the Beaten Track group includes the local, authentic and original hotels, city guides and art institutions that visitors might not automatically encounter. Travel includes the parties that make Rotterdam accessible to visitors or facilitate their stay. The National Experts are a group of experts from both the field of tourism and the academic world. Finally, Well-known & Well-liked is an umbrella name for the larger, more famous attractions, museums, hotels and catering businesses, shops, promoters, transport companies and festival organisers.

The diversity of these groups epitomises the complexity and holistic nature of tourism. Although they came from different backgrounds, the stakeholders were united in an eagerness to contribute to the Rotterdam of the future. For Rotterdam Partners, this made for an inspiring place to start.

WORK SESSIONS AND DISCUSSIONS

During the interactive work sessions and in-depth discussions, participants identified the opportunities and threats as they saw them. They provided feedback on the provisional ambitions of the Municipality; and discussed various challenges facing the city. ►

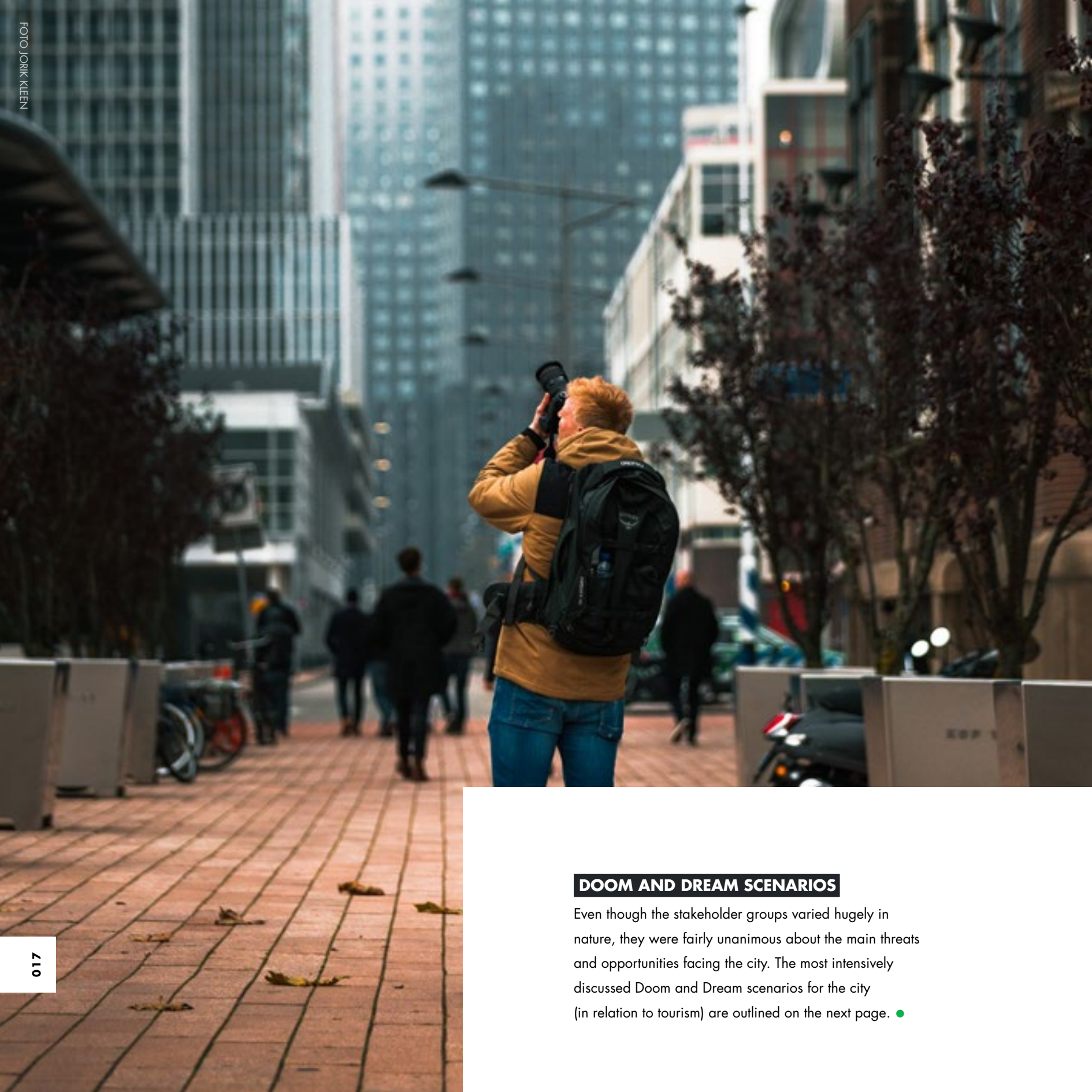




RESULTS

The sessions and discussions resulted in a range of valuable recommendations and observations for the Municipality to consider when working out its vision. The most important and noteworthy findings from the stakeholder pathway are summarised below.

- The stakeholders still see more than enough opportunities for Rotterdam tourism to grow. The city is a long way from fulfilling its maximum potential. However, we should not allow this growth to engulf us, but instead make intelligent choices to promote 'the right growth', i.e. growth that is well distributed throughout the year and aligned to the city's identity.
- The city as a whole should be able to profit from tourism. There are many areas that could benefit from more tourists and which also have the potential to attract them, and we must find ways to induce tourists to visit them by, for example strengthening the offer in those areas, improving connections, and persuading tourists to leave the well-trodden paths.
- The authentic and unique Rotterdam identity should remain central to everything we do. We must therefore be selective about the type of tourist we seek to attract and what forms of tourism we develop. That will sometimes involve deliberately refraining from doing or permitting certain things.
- The Municipality must have the courage to choose! Develop a true vision, aim for a specific goal, then act accordingly. This means not only nurturing initiatives that complement the vision, but also remedying whatever does not fit. ►



DOOM AND DREAM SCENARIOS

Even though the stakeholder groups varied hugely in nature, they were fairly unanimous about the main threats and opportunities facing the city. The most intensively discussed Doom and Dream scenarios for the city (in relation to tourism) are outlined on the next page. ●

DOOM SCENARIO

- The popularity of Rotterdam is once again dwindling; there are no tourists coming to the city and Rotterdam finds itself in the same negative position as it was a decade ago.
- Rotterdam will become little more than one great tourist theme park, with nothing but international chains and generic attractions. As a consequence, the city loses its bold character, local entrepreneurship, and unique identity.
- Rotterdam attracts a type of tourist that does not fit in with the city's identity: drug tourists, hen and stag parties, and low-value visitors. Residents experience only nuisance from this type of tourism.
- Life in the city becomes too expensive and the residents experience nothing but trouble from tourism. Rotterdam residents lose their pride and no longer feel at home in their city.
- The Municipality is not well prepared for the development of tourism. Consequently, it does not keep pace with what is happening, and strategy is developed too late. In addition, the Municipality fails to strike a balance between too much and too little control.

DREAM SCENARIO

- The city attracts many tourists, and these are spread effectively across space and time. This limits nuisance, and all parts of the city benefit from year-round tourism.
- Rotterdam remains a bold and unique city, one that need not necessarily be attractive to everyone. This will attract trendsetters and young, curious tourists who are engaged by the small-scale and distinctive offer. These visitors contribute to the positive development of the city.
- Rotterdam is known nationally and internationally as a city that is always looking ahead. The city keeps surprising visitors with a diverse, distinctive, and constantly renewed offer.
- Rotterdam residents experience and understand that tourism yields a great deal, from both an economic and socio-cultural perspective. Consequently, they feel committed to and are proud of their growing tourist industry.
- Residents are central to the development of the city and its tourism. If all parts of the city are liveable and pleasant to live in, tourists who appreciate this are bound to follow.



IV. IABx

ON TOURISM



FOTO ERIC FECKEN

“

**USE THE
TERM VISITOR
ECONOMY
RATHER THAN
JUST TOURISM.**

”



The starting point for the City Council's vision is that 'every Rotterdammer should benefit from tourism'. This means that tourism is seen not as a goal in itself, but as something that should contribute to achieving Rotterdam's wider ambitions for economic development, sustainability, liveability and the enhancement of the city's identity. To assist in the process of creating this new vision, therefore, the Vice Mayor for Tourism, Said Kasmi, asked Rotterdam Partners to organise a special 'expert' edition of their International Advisory Board (IAB) - an IABx on Tourism.

First organised in 2004, the IAB is a unique advisory council made up of international leaders from academia and the private and public sectors. The IAB meets to advise the Municipal Executive Committee of Rotterdam on economic aspects of urban development and to reflect on ideas, visions and proposals the city wants to put forward. In the past, the IABs have benefitted the city by sharing knowledge, best practice and different perspectives drawn from other countries and sectors on issues ranging from sustainable leadership and city governance to culture and climate change.

From 13 to 15 May 2019, international experts in the fields of tourism, city branding and urban development met in Rotterdam to share their knowledge and expertise. Rotterdam Partners showed the experts around the city, introducing them to local stakeholders, the Municipality and our citizens. The IABx listened to the experiences of the people they met; learned of the many roles they play in the city; and discovered how they feel about the changes taking place.

Over a series of workshops held in the city, the IABx combined their 'outside knowledge' with their experiences in Rotterdam to formulate a set of four main recommendations. Each of these recommendations is supported with a range of actions, together with ideas on how to make them happen. The recommendations are first and foremost intended for the City of Rotterdam, and the IABx stresses the importance of using them in formulating a new vision for tourism.

Above all, the IABx urges the city to broaden its vision through using the term 'visitor economy' rather than just 'tourism'.

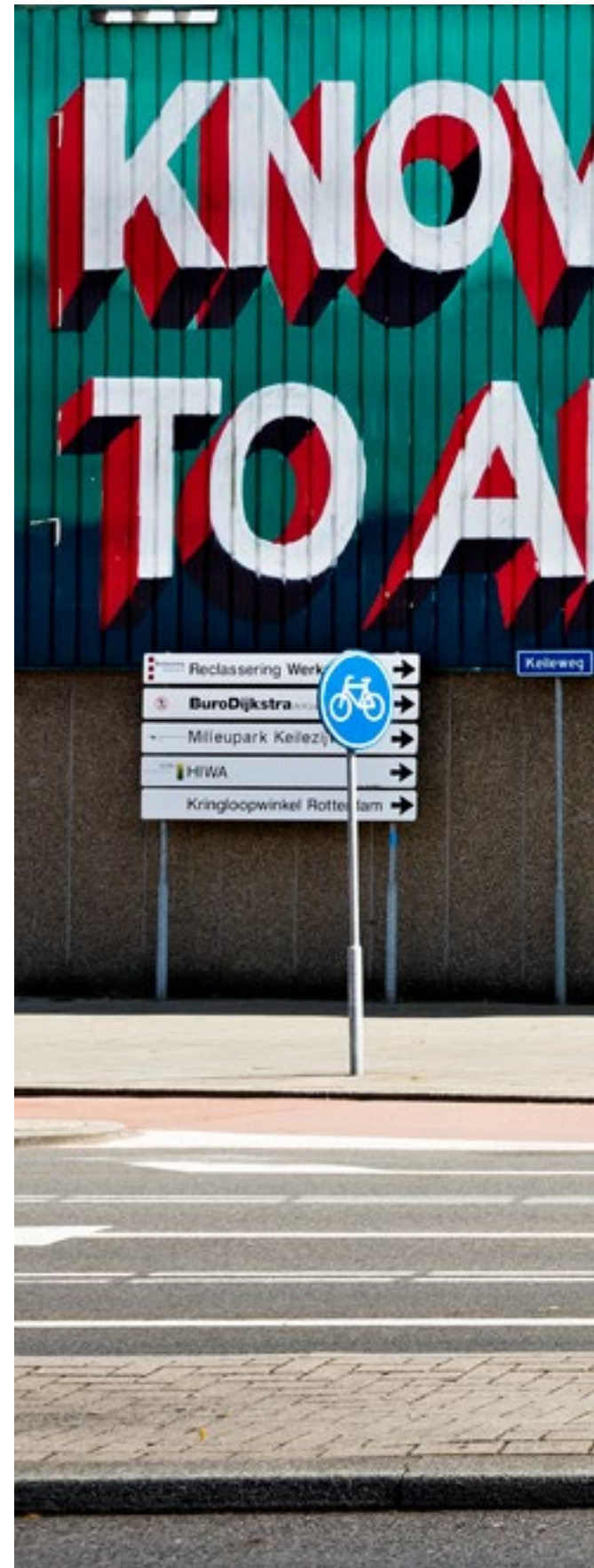
Visitor economy encompasses a more holistic perspective that looks beyond the business concepts of 'handling tourists' to include all the community aspects of 'hosting visitors'. It also acknowledges that not all visitors are leisure tourists; for example, there are business visitors, digital nomads, international students and people visiting family; as well as visitors from neighbouring cities and even visitors from other neighbourhoods within the city. This reframing also allows the IABx to use the word 'tourism' when it is referring to the traditional industry and the term 'visitor economy' when it is discussing the wider culture of visits and the effects of visitors' impact that go beyond the traditional sphere of tourism-related businesses alone.

The recommendations aim to strike a balance between 'bottom up' and 'top down' approaches. On the one hand, this ensures that all the communities and neighbourhoods of Rotterdam can define the dimensions and limitations of the visitor economy as it affects them. But it also enables the municipality of Rotterdam to provide a city-wide policy framework to manage the tourism industry and other aspects of hosting visitors effectively and wherever required.

While the guiding principles should provide a common thread connecting all actions taken by the city, there is also overlap and interaction between the other recommendations and actions. They have been put into numerical order for the sake of clarity and structure, but this does not imply either a hierarchy of importance or an order they should be implemented. Instead, and as principle 3 explicitly states, Rotterdam should always aim for a holistic approach when addressing all of these recommendations. ●

RECOMMENDATION I: DEVELOP YOUR VISION ACCORDING TO FIVE GUIDING PRINCIPLES.

While visiting Rotterdam and talking with local entrepreneurs, inhabitants and representatives from the Municipality, the IABx learned that Rotterdam has characteristics that make it unique not only in the Netherlands, but also in Europe. This realisation, combined with their expert knowledge of the visitor economy and urban development around the world, led them to develop a set of five guiding principles, which together make up the first recommendation. ►



KN TO ALL &
LL A STRANGER





PRINCIPLE 1 **DO IT THE ROTTERDAM WAY**

The IABx summarises the character of Rotterdam that they experienced as follows: fresh, contemporary, youthful, bold, forward-thinking, experimental, resilient, diverse, playful and full of potential.

These characteristics might be seen as the norm or commonplace by most Rotterdammers, but the IABx urges them to appreciate that they are not. Rotterdam's stories and communities are unique, both in the Netherlands and in Europe - initiatives like the Floating Farm, Verhalenhuis Belvédère and BlueCity are testament to this.

This is not about branding, although the extensive work to create the current brand and identity of 'Rotterdam Make It Happen' is a good place to start. This is about finding a suitable way to approach each aspect of the visitor economy that captures the specific and unique qualities of Rotterdam. It is about making sure that all actions are genuine expressions of the spirit of the city. And it is about ensuring that all policies and actions are both responsive to and contribute to the many unique communities, groups, and sectors of Rotterdam, rather than just copying what is happening elsewhere.

PRINCIPLE 2 BE A FRONTRUNNER CITY

Rotterdam is in an ideal position to make wise choices for its future. This means avoiding the mistakes that have been made elsewhere and being prepared to find innovative ways to ensure that tourism really works for the city. Rotterdam should take the lead, experiment, and set the bar high. This way it can become an example for other cities throughout the Netherlands and Europe.

To be a frontrunner city, the city government should take an active lead in all aspects of shaping a visitor economy that benefits the city, and not simply leave this to the private sector. It also means acknowledging that the visitor economy is not just about the tourism industry; it affects the quality of life, health and vitality of everyone in the city.

PRINCIPLE 3 TAKE A HOLISTIC APPROACH

Rotterdam needs to be aware of the complexity of the visitor economy and take into account the impact it has on the city's ecology, society, culture and sense of place. See it as part of the wider urban agenda. If Rotterdam wants to be a future-proof city and wants its communities to thrive, then its visitor economy must be integrated with and serve the aspirations and dynamics of Rotterdam's ecology, society, economy and culture as a whole.

Rotterdam should therefore maintain a holistic approach when developing the new vision for tourism. This is necessary because the visitor economy is unlike many other economic sectors. It is a strongly interconnected network of different actors, some of whom (such as retailers, bakeries or market salespeople) may not even realise that they are part of it.

In fact, it is more than a network. The visitor economy is a living ecosystem, consisting of highly international and highly localised businesses and everything in between. And it is made up of an infinite diversity of visitors, some coming as individuals, others in groups, and all coming for differing reasons, be that leisure, business, to see family, or something else.

The visitor economy benefits from the city, it must also provide benefits to the city in return. At the same time, it needs to address any negative impacts it causes, rather than leaving them for the rest of the community to cope with as best they can. Also, and perhaps more than any other economic sector, the visitor economy can influence the entire image of the city. It can be something that affects everything else the city wants to do and be.

This holistic approach applies to the vision for tourism, but it also means that other aspects of city development need to take the visitor economy into account when developing their own visions and policies. As an example: the city of Antwerp uses a Toerismetoets ('tourism check') to make sure the visitor economy is taken into account in every aspect of urban development and decision making. ►

LL

**THE VALUE OF
THE VISITOR
ECONOMY IS
MORE THAN
JUST FINANCIAL,
IT CONTRIBUTES
TO RESIDENTS'
WELLBEING AND
QUALITY OF LIFE.**

LL



FOTO IRIS VAN DEN BROEK

PRINCIPLE 4 **GENERATE LASTING VALUE AND BENEFITS**

Given that the city is a living ecosystem on a living planet, its capacity to generate value or benefit can best be nurtured, not simply exploited. This means focusing on creating a visitor economy that generates greater net value for Rotterdam as a whole, rather than one that just extracts resources from the city and ignores the wider costs of doing so.

The value of the visitor economy is also more than just financial. Its success should be defined therefore by how much it contributes to the health and vitality of Rotterdam's ecology, society, economy and culture. This needs to be measured so as to understand how it contributes to residents' wellbeing and quality of life.

As an increasingly popular destination, Rotterdam needs to make conscious decisions about the future it wants and the role of the visitor economy within it. The Municipality's priority must therefore be to create the conditions in which the city's social, cultural and economic health can thrive. This means creating the sustainable employment and fairly-paid jobs that underpin local residents' pride in their city. It also means ensuring that any communities wishing to attract more visitors have the knowledge, skills and resources to welcome guests in their own distinct versions of the Rotterdam Way.

PRINCIPLE 5 **ALWAYS BE INCLUSIVE**

Tourism's profits and benefits tend to flow disproportionately to the sector's corporate players. The IABx feels there should be a much wider network of beneficiaries, with profits and other benefits distributed among all kinds of people, communities and businesses within the city. It also believes that more people and communities in the city can participate in the visitor economy, help define its dimensions, and contribute to its growth. And that they can do this not just as beneficiaries, but also by playing active roles in creating and shaping the visitor economy to be compatible with their preferences.

Rotterdam is unique in its diversity, not only in the Netherlands, but in Europe as well. This is a strength that should be nurtured. The city is made up of more than 100 neighbourhoods and is a place where 170+ nationalities and hundreds of cultures find their home. These communities (and each unique individual within them) have different needs and ambitions in terms of economic development, social cohesion or liveability. There needs to be ongoing dialogue with these different communities on how each of them can benefit from the visitor economy.

Rotterdam should strengthen local capacity to shape the forms of tourism that suit the unique conditions, personality, capabilities and aspirations of each community and neighbourhood. ●

RECOMMENDATION II:

ASSESS, DEFINE AND MANAGE THE SUCCESSES AND RISKS OF THE VISITOR ECONOMY AND SHARE THESE WITH THE CITY.

Since 2012, the number of visitors to Rotterdam's hotels has grown by almost 70%, and that number is expected to keep growing, with more hotels and other facilities springing up as a result. Rotterdam has rapidly changed from a city that welcomes a few visitors into an actual 'visitor city'. This development has brought many opportunities, but it also comes with the responsibility to properly assess and manage this growth and its impact on the city and its inhabitants.

Around the world, the visitor economy has traditionally been measured in ways that tend to overestimate positive impacts and underestimate negative ones. Data on the number, type and amount of expenditure of visitors mostly comes from national and international databases and travel organisations; and it often fails to reflect the unique behaviour of certain visitors in a given place. The influence of visitors is often monitored by organisations and stakeholders in, or dependent on, the travel industry. This raises questions about transparency, vested interests, the risk of disinformation, and a potential lack of awareness of wider concerns.

In order to truly measure the full impact of the visitor economy, therefore, the gathering of complete, transparent and locally relevant data is vital. Rotterdam needs to establish definitions, standards and indicators for its own visitor economy. It needs to monitor the visitor economy in ways that enable it to shape policy and planning that works for the city. Only then can the benefits and risks of welcoming visitors to the city be properly assessed, defined and managed.

SUGGESTION 1 **BETTER UNDERSTAND COSTS AND BENEFITS IN ENVIRONMENTAL SOCIAL AND CULTURAL TERMS**

The effects of the visitor economy are often only expressed in financial and economic terms. We should acknowledge that destinations are in fact highly complex and diverse living ecosystems. A visitor is a temporary resident, and like any other resident, visitors not only influence the city's economy, but also its environment, social structure, cultural heritage and liveability for other residents.

In order to properly understand the impacts of visitors, there is a need for better metrics and data on the type of visitor, the places they visit, their expenditure, the means of transport they use, their ecological footprint, and the ways they interact with other residents. In addition, the city needs a fuller insight into the impacts of the many different kinds of suppliers engaged in the visitor economy.

Measuring the environmental, social and cultural effects of cruises, hotels and tour operators on the city is crucial, as these actors play a key role in the visitor economy and are also part of the ecosystem that is the city.

Accurate and comprehensive data, specific to Rotterdam, is therefore needed. The Municipality should collaborate with suppliers, visitors, residents and partners within and outside the city to develop the means for gathering this data, and then do so. ►



SUGGESTION 2 DEFINE MASS TOURISM AND OVERTOURISM AND THEIR INDICATORS

The concepts of overtourism and mass tourism are often wrongly used to mean the same thing. It is particularly important for Rotterdam to define what each of them means for the city and develop indicators to monitor them.

Overtourism, a much discussed topic in recent years, is by definition unfavourable and undesirable. Many destinations around the world are experiencing the burden of too many visitors, who fail to generate sufficient benefit to cover the cost of serving them. However, 'too many' is itself a subjective term. Rotterdam needs to continually assess what constitutes 'too many' for its citizens; what sort of visitors and visits help the city achieve its goals; and how this varies between neighbourhoods and communities.

This should involve a combination of quantitative and qualitative measures. Quantitative measures are necessary to define what volume of visitors (of any type) is 'too many'. Qualitative measures help the city avoid the type of unwelcome visit that is poorly organised, insensitive, or has a negative impact. Likewise, both types of measures are necessary to define the types of welcome and beneficial visits, and to determine how much they should be enabled to grow.

SUGGESTION 3 BETTER UNDERSTAND YOUR VISITORS AND THE TRAVEL INDUSTRY

In order to develop its strategies, it is essential that Rotterdam thoroughly understands the motivations of its visitors, the dynamics of the global travel industry, and global developments in the visitor economy. These insights should also be shared with residents, local entrepreneurs

and media. This will help them understand Rotterdam's place in the world of tourism, and appreciate how the Municipality's strategies can contribute to local goals and ambitions.

Recognise that national and international businesses also have plans that involve Rotterdam. Ensure these plans support residents' vision for their communities, are compatible with local aspirations, and are consistent with the Rotterdam Way.

SUGGESTION 4 MONITOR CITIZENS' LEVELS OF SUPPORT FOR THE VISITOR ECONOMY

The visitor economy can have a major influence on local people's lives. The public should therefore be engaged at a very early stage. What do Rotterdammers think of visitors coming to their city, neighbourhood and streets? To what extent do Rotterdammers think visitors are beneficial to the local economy and society, and to what extent do they see visitors (and the businesses that cater to visitors) as a burden?

Actively and continuously acquiring and sharing this information will enable a quick response to negative signals, as well as the ability to build on positive ones. Involving Rotterdammers at an early stage will show them they are being taken seriously. This approach should underpin the city's intention to make sure that every resident profits from the visitor economy.

Monitoring citizen support is also the first step towards a more bottom-up and community-led approach, as suggested in the next recommendation. ●



LL

**INVOLVING
ROTTERDAMMERS
AT AN EARLY STAGE**
WILL SHOW THEM
THEY ARE BEING
TAKEN SERIOUSLY.

JJ



RECOMMENDATION III:
EMPLOY A COMMUNITY-LED
APPROACH TO ENSURE THAT THE
VISITOR ECONOMY CONTRIBUTES
TO COMMUNITY WELL-BEING.

One of the core characteristics of Rotterdam's identity is its diversity. This is a strength to be both tapped and nurtured. Every community and neighbourhood deserves an approach to the visitor economy that suits its specific ambitions and needs.

The IABx is convinced there should be much stronger and clearer connections between community ambitions and what the visitor economy is able to provide. The main goal of the Municipality should be to create benefit for locals in economic, social and environmental terms. This is also in line with the city council's central ambition that 'every Rotterdammer should benefit from tourism'.

SUGGESTION 1 HAVE AN ONGOING CONVERSATION ON NEEDS AND AMBITIONS

Use the structures already in place to help communities organise and communicate their needs, dreams and ambitions. Make them aware of the choices they have with respect to growing the visitor economy on their own terms, and discuss how their local communities could benefit from it. Work towards shared goals for each community, and work with communities towards achieving those goals. For example, this might involve identifying what sort of leisure or service facilities could benefit both residents and visitors, and then working out how the tourism industry can deliver them.

SUGGESTION 2 INVOLVE CITIZENS OF ALL BACK- GROUNDS AND CONNECT COMMUNITIES

Rotterdam is an incredibly diverse city, both socio-economically and in terms of nationalities, ethnicities and subcultures. The Municipality should make sure that the visitor economy contributes to the nurturing of this diversity; that it empowers each community to attract the visitors who support its needs and ambitions; and that it is able to accommodate and look after them in ways that are compatible with its own personality and aspirations.

At the same time, prevent the emergence of new silos. Connect communities within the city with each other and even try to extend connections to the origin communities, families and networks of the 170+ nationalities that are present within Rotterdam. In this way, Rotterdam can create a vast, integrated network of communities that can also be attractive for the type of visitor who is interested in the incredible diversity of Rotterdam and the authentic richness of its communities. ►

SUGGESTION 3 IMPLEMENT

NEIGHBOURHOOD GRANTS FOR VISITOR-RELATED PLACEMAKING

Many neighbourhoods could potentially benefit from the visitor economy. It could help them meet both their short term needs and long term dreams. However, an area has to be interesting enough to attract visitors. Therefore, the city should set up a grant system for neighbourhood placemaking that first and foremost contributes to the direct needs of the community, while also making the neighbourhood more attractive to visitors.

Start with a pilot in at least three neighbourhoods. Work with them to define what constitutes success. Monitor progress, and apply the lessons learnt to future initiatives.

SUGGESTION 4 LEARN FROM

BEST PRACTICES

Having ongoing conversations with communities and neighbourhoods is essential. This can be a difficult and time-consuming process, but in doing so, the journey should be seen to be just as important as the destination. There are best practices out there that Rotterdam can learn from: Copenhagen, Flanders, Iceland, Edinburgh and Barcelona have all organised such projects, which ranged from asking residents how they felt about visitors in their area to full scale citizen participation exercises in urban renewal. Rotterdam should also look towards the Transition Town Network, which has been developing community-based initiatives and tools for over a decade. ●







RECOMMENDATION IV:

TAKE A DIRECT LEADERSHIP ROLE THROUGH BOLD, INTEGRATED AND CITY-WIDE DECISIONS TO ENSURE THAT THE VISITOR ECONOMY CONTRIBUTES TO THE CITY'S WELL-BEING.

A successful visitor economy can contribute towards a community's well-being, and healthy communities make for a healthy city. Rotterdam can achieve this through a thorough, smart, bottom-up approach that puts the interests of its incredibly diverse communities and neighbourhoods at its heart. At the same time, no city can manage without its own very clear top-down strategy and policy.

SUGGESTION 1 DEFINE A HEALTHY VISITOR ECONOMY AND DEVELOP POLICIES TOWARDS IT

Rotterdam should establish its own definitions of success, based on city-wide ambitions for economic and sustainable urban development in combination with the needs of local communities. Rotterdam should then develop policies aimed at the realisation of these ambitions.

This starts with defining and developing a long-term strategy where the city describes how the visitor economy can work as a means to achieve city-wide ambitions. These ambitions should match both the ambitions and needs of local communities, as recommended earlier, and the ambitions as defined in a city-wide vision. In this sense, the visitor economy can and should work towards both achieving city-wide ambitions and addressing the needs of local communities.

SUGGESTION 2 TAKE A STEP-BY-STEP APPROACH

While having long-term ambitions is essential, the city should also create a path towards those ambitions that is based on a series of deliverable short-term goals. Define the success criteria for these goals and monitor progress, being completely transparent about what works and what doesn't.

As stated earlier, the data currently used to assess the visitor economy often falls short of what is really needed. Rotterdam must therefore work towards developing new Key Performance Indicators (KPIs) that reflect the city's success or failure with regard to the achievement of long-term ambitions and short-term goals. Current KPIs are often quantitative. Quantitative indicators need to be supplemented with qualitative KPIs to monitor the contribution of the visitor economy to Rotterdam's ecology, society, economy and culture as a whole. ►

SUGGESTION 3 ENSURE THE VISITOR ECONOMY PROVIDES QUALITY WORK

The visitor economy is a major source of employment, with 6.4% of Rotterdam's jobs found in the leisure and travel sectors. Rotterdam has also set ambitions for tackling poverty and income inequality among its citizens. The visitor economy can contribute to these goals, providing employment opportunities, especially for practically educated and socially vulnerable groups.

The government of Rotterdam should therefore work with the travel industry to create and ensure year-round, quality jobs. These jobs should guarantee fair, gender-equal pay and working conditions. The city should minimise the risk of jobs that don't meet these standards. The city government and tourism industry need to organise and collaborate to monitor the quality of work on offer, and programme change within the public and private sectors as required.

SUGGESTION 4 IMPLEMENT A HOTEL POLICY (SOCIAL MIX)

Research commissioned by the Municipality of Rotterdam shows that the number of hotel rooms in Rotterdam rose from 4,025 in 2010 to 5,502 in 2017. This number is projected to grow by a further 40-60% by 2024. This is another reflection of Rotterdam's increasing popularity with both visitors and the entrepreneurs who cater to them.

To ensure that Rotterdam will not be burdened by a sudden rise in the type of hotels that don't reflect its own ambitions or its communities' preferences, the city should implement a hotel policy. This policy can guide the development of new hotels in line with the city's ambitions, and can ensure that the most appropriate neighbourhoods benefit from new developments.

The IABx refers to the 20-30-30-20 policy used by the city for new housing developments as a possible best practice upon which to base hotel policy. In this policy, new housing developments (for the city as a whole) should reflect a preferred mix (social, mid, upper and top). A similar structure could be applied to hotel development, where the percentages could reflect the type of hotel the city would prefer or wants to limit.

SUGGESTION 5 IMPLEMENT A HOME RENTAL POLICY

The renting out of private homes for tourism purposes (e.g. through Airbnb or Booking.com) has skyrocketed in the past decade. Home rental can have economic, social and cultural benefits for citizens and communities and can support the spread of visitors around the city. However, the lack of regulation in this area has proved to be problematic in many other tourist destinations. Rotterdam has regulation in place, but the IABx recommends reviewing this policy now, before the growing home rental phenomenon becomes a problem.

The city has first to address the multi-listing issue, whereby investors buy up several homes for the sole purpose of renting them out through one of the many online platforms, reducing an already too-small housing stock and creating de-facto hotels that do not need to comply with the same regulations as the city's hotels. Secondly, the city must establish the maximum number of such rental properties in an area, and whether limits should also be put upon how many weeks a year they can be rented for. These decisions need to match the needs and ambitions of each neighbourhood. ►

FOTO GUIDO PUPER



FOTO IRIS VAN DEN BROEK

LL

**THE URBAN
SYSTEM AS
A WHOLE,
INCLUDING
THE VISITOR
ECONOMY,
WILL HAVE TO
ADAPT.**

JJ



SUGGESTION 6 SET ENVIRONMENTAL STANDARDS FOR ALL VISITOR-RELATED FACILITIES

In accordance with Rotterdam's frontrunner image, the city has high ambitions with regard to sustainability and circularity. To achieve these goals, the urban system as a whole, including the visitor economy, will have to adapt. At the same time, the city should capitalise on its potential to benefit from increasing consumer awareness of this issue. The city should make a conscious effort to set environmental standards and quotas for all visitor-related facilities, such as hotels, cruise ships and attractions. Established facilities will need to adapt to these environmental criteria, and new facilities will have to demonstrate that they can meet these standards in order to be approved.

A practical example: in line with its frontrunner role, Rotterdam should establish a citywide, environmental certification mark for visitor-related facilities, built with the help of international benchmarks. Rotterdam should also favour and support those hotels, events, tour operators, conferences etc. that act in an environmentally responsible manner. These facilities can also encourage visitors to minimise their travel footprint.

SUGGESTION 7 REINVEST TOURISM TAX FOR COMMUNITY AND SOCIAL RETURN

Visitors contribute to the city's economy through direct expenditure: e.g. hotel bookings, public transport tickets, dinner at a restaurant, a souvenir from Rotterdam Tourist Information. They also provide the Municipality with extra funds through the tourism tax. Reinvest this extra capital in local communities and bottom-up, visitor-related initiatives, examples of which are mentioned throughout this report.

The aforementioned neighbourhood grants for placemaking are a perfect example of an initiative that will stimulate social return and also make communities more attractive for visitors. Be fully transparent about the way this 'visitor contribution' is distributed. This helps residents to understand how visits are directly linked to improvements in their immediate vicinity. Going further, involve residents in deciding where the money is to be spent.

SUGGESTION 8 CREATE AND MANDATE A ROTTERDAM TOURISM INSTITUTE

A Rotterdam Tourism Institute should coordinate research, monitor progress, and give advice to the Municipal government, local businesses and residents. The Institute should consist of stakeholders from governmental institutions, the private sector, civil society and academia. It can help putting the different recommendations and suggestions in this report into action. This could mean creating insights into how world trends in the visitor economy affect Rotterdam, or defining indicators that accurately reflect the impact of the visitor economy in the city. ●



V. IAB MEMBERS



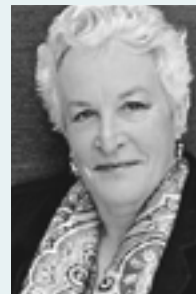


IAB MEMBERS



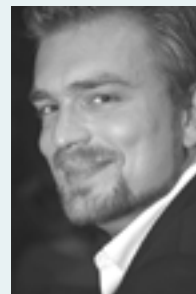
LARRY BEASLEY

Larry Beasley, CM, from Canada, is the founding principal of Beasley & Associates, an international urban planning consultancy, professor of planning at the University of British Columbia, author of several books on urbanism, and retired Chief Planner for the City of Vancouver. Mr Beasley acted as the chair of the 2019 IABx session.



ANNA POLLOCK

Anna Pollock, citizen of both the UK and Canada, is founder of Conscious.travel, a consultancy delivering strategic advice and innovative thinking to tourism destinations around the world. Her focus is now on applying regenerative development concepts that enable destinations to deliver greater net benefits from tourism to the host community.



MARTIN BOISEN

Martin Boisen, originally from Denmark, is the founder and owner of the advisory firm For the Love of Place, Lecturer in Human Geography & Planning at the University of Groningen, Vice Chairman of The International Place Branding Association and Knowledge Group Advisor to European Cities Marketing.



MIEK DE ROECK

Miek De Roeck, from Belgium, is the director of Visit Antwerp and the chairperson of the City Marketing Knowledge Group of European Cities Marketing.



PETER JORDAN

Peter Jordan, from the United Kingdom, is a consultant, researcher and strategist at Toposophy Place Making and Marketing Agency. Now based in Amsterdam, Peter has worked for a range of global tourism associations, including the UNWTO, tracking emerging trends in consumer behaviour and travel.



CLAUDIO MILANO

Claudio Milano, from Spain, is a social and cultural anthropologist with a background in economics and over 10 years academic and industry experience. He is a consultant in international tourism development, researcher and lecturer. He has worked and collaborated as a consultant to international agencies on human rights, rural development, urban planning and tourism. He has recently contributed to a study on overtourism in European Union funded by the European Parliament.



JEREMY SMITH

Jeremy Smith, from the UK, is the author of Transforming Travel-realising the potential of sustainable tourism (2018), and writes a fortnightly blog on sustainable tourism for World Travel Market. He provides strategic consultancy on issues including climate change, overtourism, and communicating sustainable tourism for organisations including the UK National Parks, Tripadvisor, TUI and the European Travel Commission.



JANNELIEKE AALSTEIN

Jannelieke Aalstein, from Rotterdam, was deputy director at Rotterdam Partners at the time of the IABx on Tourism 2019. Purpose, passion and energy are key with Jannelieke. City challenges, connecting the dots and the stories and ideas of the people living in Rotterdam have her greatest interest.



RENEE MARCELIS

Renee Marcelis, from Rotterdam, is Program Manager at Bouwkeet and Chair of R'damse Nieuwe, the network organisation that aims to empower and connect young, engaged citizens to make Rotterdam more beautiful every day.



VI. EPILOGUE



ROTTERDAM.
MAKE IT
HAPPEN.



DO IT THE ROTTERDAM WAY

Until now, our tourism policy has mainly focused on attracting more visitors, who stay longer and spend more. Now that Rotterdam's popularity as a tourist destination is growing faster than average, and tourism is undergoing a highly significant development worldwide, a new tourism vision is needed. A vision that goes beyond economic benefits alone.

We are now asking ourselves whether tourism could also constitute a resource for achieving this city's ambitions. How could all Rotterdam residents reap the benefits of the growth in tourism? How could Rotterdam remain true to itself? And how could tourism contribute to other important urban concerns such as quality of life, sustainability and the energy transition?

A good example is Katendrecht. For a long time 'De Kaap', as Rotterdam locals call this peninsula, faced serious social problems. However, following an ambitious renovation project, the construction of new homes, and the arrival of all kinds of culinary and creative entrepreneurs, it is now a tourist and socialising hotspot, and a popular residential area. Tourists and Rotterdam locals flock here for a bite to eat, to drink a locally brewed beer, or visit the steamship ss Rotterdam at the quay. This is precisely what I want to achieve: an appealing destination where tourism serves the city and its residents.

That requires a new perspective. I asked Rotterdam Partners to engage in dialogue with stakeholders in the city on this issue. The results reveal that there is support for this new perspective. I am glad, because I believe it is important for the city to share our new vision and feel like a co-owner.

Naturally, I was also curious about the views of external parties. Therefore, I am delighted that we have spent three days with the 'professional eyes' of the International Advisory Board. Their recommendations are very important and valuable for our new tourism vision. The advice of the board to 'stay close to our identity and build upon it' fits us like a glove.

We'll keep doing it the Rotterdam Way! ●

Said Kasmi

Vice Mayor of Tourism



COLOPHON

Editorial board

Ewout Versloot

Jor van der Mijl

Jeremy Smith

Cover photo

Iris van den Broek

Design

brndcrmb (Isa van der Brugge, Robert van den Broek)

© 2019 Rotterdam Partners. All rights reserved. This document or any portion thereof may not be reproduced, distributed, or transmitted in any manner whatsoever without the express written permission of the copyright holder.