

Feasibility Study  
Drenthe

PUYDUFOU®

June 14, 2021



# I. PROJECT ANALYSIS

- A. HISTORICAL AND CULTURAL ENVIRONMENT
- B. MARKET ANALYSIS & COMMERCIAL ENVIRONMENT
- C. ECONOMIC AND BUSINESS CONTEXT
- D. PLOT ANALYSIS
- E. GENERAL ASSESSMENT

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# EXECUTIVE SUMMARY

**Puy du Fou's ambition, strategy and purpose stand in one word :  
« Emotion ».**

While « **Emotion** » is a very demanding destination that requires passion, devotion and a relentless commitment, it is more than anything our main asset as it, through times, defined our identity and dictated our success.

Besides, Puy du Fou's trajectory revolves around **national History**. No matter the localization, might it be France, Spain or in this case Netherlands, both our pride and promise is to pay tribute to former times by enhancing historical events or characters thanks to original and breathtaking shows that can not be seen anywhere else.

Necessarily, many ingredients must be reunited to make the magic happen:

- ▶ A **wonderful landing site** anchored in nature with sufficient attendance and logistic structures to welcome the visitors
- ▶ Inspiring **show perspectives**
- ▶ **Economic** and **legal feasibility**
- ▶ Overall, a **sufficient frame** to keep our « Emotion » pledge to the visitors.



# EXECUTIVE SUMMARY



With respect to those considerations, this feasibility study revealed **challenges** over the possibility of building a Puy du Fou park within Drenthe. From an artistic point of view, we highlight the fact that the **Dutch History is recent, punctuated by periods of regret** and, to this extent, it is a concern to provide enough content to build a full park.

Secondly, regarding the landing sites, we have been charmed by the beauty and authenticity of **Drenthe's landscapes and culture**. While it definitely meet our values and requirements, Netherland's geographic specificities and its relatively small area nuance our enthusiasm as it thickens the competition. However, it appears that Drenthe's usual tourism expectation, with an ideal **family attendance**, may match our value proposition and visitor experience.

Then, while building a park represents a milestone, induces important investments and has its share of risk ; we are confident in **the Netherlands being an ideal business frame**: economically, fiscally, and legally. The country's dynamism and Drenthe's resiliency against the Covid situation align with Puy du Fou's strategy. In regards to the labour market, we enjoy the prospect to **find passionate and qualified Dutch talents** but dread the rarity of those profile due to the shortage of workforce.

# EXECUTIVE SUMMARY

Eventually, taking into accounts all the mentioned parameters, Puy du Fou Nederland despite many challenges to overcome has its share of potential. Providing strategic adjustments that differs from what characterize our classic model, **we truly believe, alongside Imagine Leisure, in our capacity to develop a sustainable leisure destination synonym of Emotion, Roots and Family.**





A.

HISTORICAL &  
CULTURAL  
ENVIRONMENT

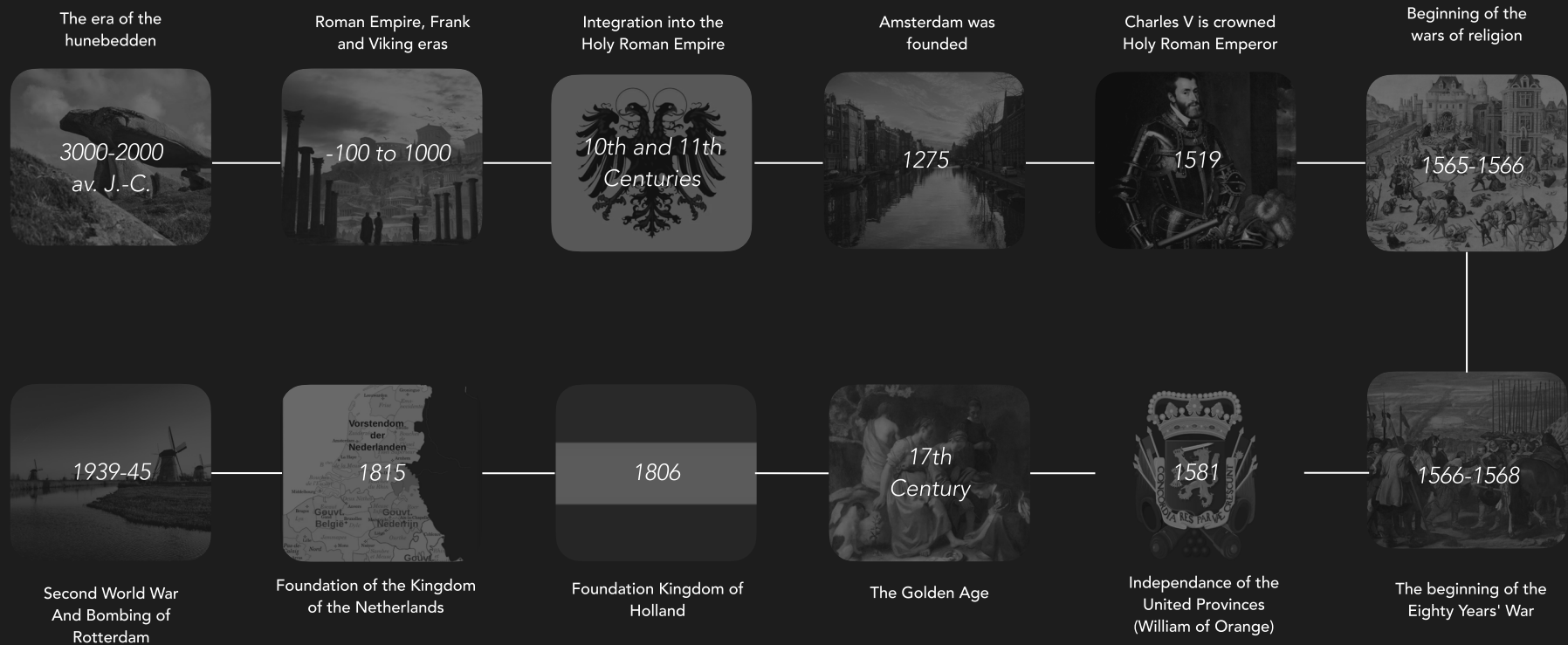
1. Introduction
2. History of The Netherlands
3. History of Drenthe
4. Major figures
5. Cultural heritage
6. Rating

# INTRODUCTION

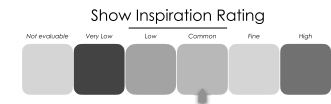
The history of the Netherlands is **tumultuous**, intimately linked to the sea, exploration and commercial development.

If the Golden Age saw the emergence of artistic wonders and free-trade that made the country famous, the late construction of the Netherlands was above all built around cardinal values that characterize the Dutch identity: **tolerance, freedom of conscience and entrepreneurship, mutual aid in the fight against water.**

# HISTORY OF THE NETHERLANDS



# BEFORE THE UNITED PROVINCES

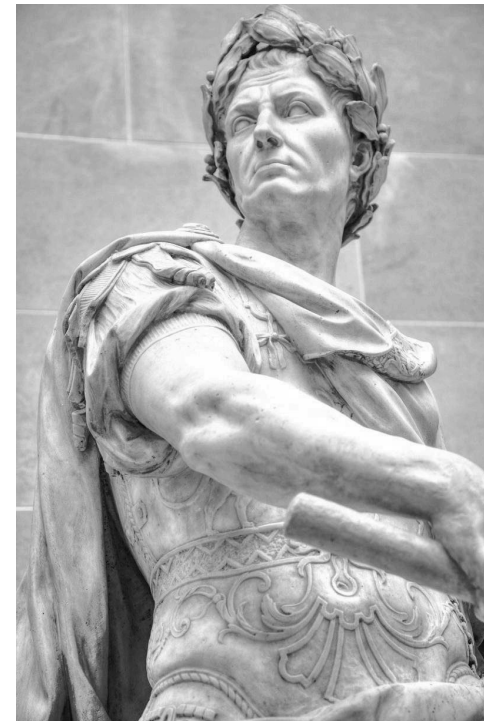


The first invaders of the present-day Netherlands mentioned in history were the **Romans**, who, under the leadership of **Julius Caesar**, conquered a vast area along the Rhine and its tributaries around 59 BC. The **Celtic** and **Germanic** tribes adapted to this rule and Utrecht became an important outpost of the Empire.

As the Roman power began to weaken, the **Franks**, members of a confederation of Germanic tribes, imposed themselves by force. By the end of the 8th century, they had completed their conquest of the Low Countries and had begun to convert the local population to Christianity, if necessary by force. **Charlemagne** was the most successful in this respect.

Over the next two centuries, in the face of **Viking** raids on the major Dutch rivers, local chiefs built fortified towns and established their government and laws.

At the beginning of the second millennium, few cities were growing as the marshlands were besieged. The provinces of the future Netherlands experienced a real boom in the **15th century**, under the protection of the Holy Roman Empire. This was the beginning of a period of **great prosperity** for the Netherlands, the first of many that followed.



# FOCUS: THE BATAVIAN REVOLT



*The Conspiracy of Claudius Civilis.*  
Rembrandt, 1661.

The **Batavian Revolt** took place in the Roman province of Lower Germain between **69** and **70**.

The revolt was led by the **Batavians**, a small but militarily powerful Germanic tribe that lived in Batavia, in the Rhine delta, against the Roman Empire.

They were later joined in the conflict by the Celtic tribes of Belgic Gaul and some Germanic tribes. Under the leadership of their hereditary prince **Caius Julius Civilis**, an auxiliary officer in the imperial Roman army, the Batavians and their allies managed to inflict a series of humiliating defeats on the Roman army, including the destruction of two legions.

After these initial successes, a powerful Roman army led by the Roman general **Quintus Petillius Cerialis** finally defeated the rebels.

Following peace talks, the Batavians **again submitted** to Roman rule, but were forced to accept **humiliating conditions** and a legion permanently stationed on their territory at **Noviomagus** (present-day Nijmegen, Netherlands).

# THE EIGHTY YEARS' WAR

**The Eighty Years' War was a dramatic and emblematic period** for the Netherlands. It was during this turbulent period, that the Netherlands could really assert itself and become a true nation.

The Eighty Years' War (1568-1648) was an armed uprising against the Spanish Netherlands by some of the seventeen provinces of the Spanish Netherlands.

The conflict, which began with the revolt of the **Beggars**, who demanded religious freedom, gradually turned into a civil war, which divided the Netherlands into two parts, politically and religiously, and took the form of a confrontation between Catholic Spain and the Protestant **United Provinces**: the Protestant Northern United Provinces were opposed to the Catholic Southern Netherlands.

**William I, Prince of Orange-Nassau** (1533-1584) was appointed stahouder (governor) by King Philip II of Spain and converted to Calvinism after having been raised Catholic. He then took the lead in the revolt that led to the Eighty Years' War and, in 1581, to the **independence** of the republic of the United Provinces, the beginnings of the present Kingdom of the Netherlands.



# THE EIGHTY YEARS' WAR



*The Surrender of Breda. Vélasquez, 1635.*

The **Union of Utrecht**, a treaty signed on January 23, 1579 in the Netherlands, unified the provinces that wanted to separate from the Spanish Netherlands for both political and religious reasons.

The **Thirty Years' War** then completed the Eighty Years' War, with series of armed conflicts that tore Europe apart from May 23, 1618 to May 15, 1648.

The causes were multiple, but the trigger was the revolt of the Protestant Czech subjects of the **House of Habsburg**, the ensuing repression and the Habsburgs' desire to increase their hegemony and that of the Catholic religion in the Holy Roman Empire.

The **Peace of Munster** (1648), which was part of the Treaty of Westphalia, finally formalized by an act the independence of the United Provinces from the King of Spain.

# FOCUS: THE SIEGE OF LEIDEN



The **Siege of Leiden**, which took place from October 1573 to October 1574, was conducted by Spanish troops under the command of **Francisco de Valdez** during the Eighty Years' War.

After the rebels had taken the city in 1572, it was protected by modern fortifications and could only be taken after a prolonged siege.

After reducing the mutiny of the Spanish tercios in April 1574, Valdés laid siege to the city in May. The rebels had breached the dykes earlier, so that the city was protected by **a kilometre of flooded land**. On 11 September, a fleet of rebels entered from the sea through the flooded land with the aim of breaking the successive dikes to gain access to the main canal and thus enter Leiden with provisions, which they succeeded in doing on **3 October 1574**, forcing Valdés to withdraw.

William of Orange wanted to offer the citizens a compensation. They asked for the establishment of the University of Leiden, which was founded the following year and is still in operation. It is the **oldest university in the country**. The **anniversary of the end of the siege**, 3 October, has been celebrated annually in Leiden since 1886.



*Relief of Leiden by the Geuzen on flat-bottomed boats, on 3 October 1574. Otto van Even, 1574.*

# FOCUS: THE CAPTURE OF BREDA



*The Peat boat at Breda. Charles Rochussen, 1590*

In March 1590, the city of Breda was taken from the Spanish in a **surprise attack**.

Using a clever Trojan horse tactic, seventy Dutch soldiers managed to break into the town, hidden in a **peat barge**, and put the 600 soldiers of the garrison to flight, capturing the town **without suffering a single loss**.

This was the turning point of the war because the forces under Maurice of Nassau were able to take the offensive.

The capture of Breda was a blow to Spain's prestige. The resounding success of the capture by Anglo-Dutch troops without loss was **widely celebrated in the United Provinces**, both for the strategic value of the city and for the **patriotic symbolism** that such a spectacular victory had in the eyes of the Dutch.

The city will be taken back by the Spanish in 1625, after a fierce and courageous defense of the Justin de Nassau's troops. A very famous painting of Velasquez illustrates this episode (*The Reddition of Breda*, 1635)

# THE GOLDEN AGE

## THE HEIGHT OF THE 17TH CENTURY

The "**Dutch miracle**", as Richelieu called it, takes on its full meaning when we talk about the **Golden Age**.

In the 17th century, the United Provinces, was the envy of all of Europe. They were then one of the first **economic, sea and colonial powers** of the time.

This Golden century was the origin of the spirit of **tolerance** that still prevails in the Netherlands today.

This century also helped to establish the solid reputation of the Dutch for honesty in banking and insurance, a reputation that they still enjoy in the European Union today.

The 17th century was considered the Golden Age thanks to the expression of a **varied and rich culture**. The arts, the political model, as well as the great discoveries of this century are at the origin of this hegemony.



*The painter's studio. Veermer, 1666.*

# THE GOLDEN AGE



*Christ and St Mary Magdalene at the tomb.  
Rembrandt, 1638.*



## THE ARTS

Painting: During the Golden Age, the United Provinces enjoyed a plethora of pictorial art. The diversity of techniques and ways of painting was represented by artists of genius who made this century the most flourishing period of this nation. The best known representatives of this period of painting are **Vermeer** and **Rembrandt**.

Music: Amsterdam was a musical center. The advent of opera and concerts was a reality at that time. In the churches, the organ was played outside of service hours. This century saw the emergence of great composers such as **Jan Pieterszoon Sweekinck**, whose fame extended far beyond the borders of Amsterdam and the Netherlands. His works were performed all over Europe.

Poetry: The poet **Van den Vondel** is the emblem of the Golden Age. Also, the poets Bredero and Pieter Corneliszoon Hooft declaimed their verses to high society. Theaters were usually full and grassroots plays were the most popular. **Hugo Grotius** was also one of the most allegorical playwrights of this time.

# THE GOLDEN AGE

## POLITICAL MODEL & VALUES

Thanks to the political actuality of the republic of the United Provinces, the Netherlands enjoyed a political model without tyranny, based on the values of **freedom** and **tolerance**. The country experienced a **social peace** unprecedented in Europe.

Moreover, the United Provinces were born after a religious war, so they gave their citizens freedom of worship from the start. This freedom fascinated, and as a result many **refugees**, from Portuguese Jews to French Huguenots, came to settle and brought with them their know-how and networks.

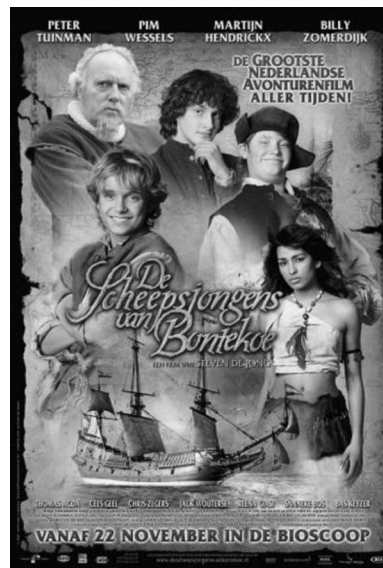
This freedom, also granted to teaching, research and publishing, attracted thinkers and scholars from all over Europe, following the example of Descartes. The United Provinces became the **publishing house of the Old Continent**, while their universities, such as Leiden, were the major centers of the 17th century. These freedoms have favored the prosperity of the Golden Age.



# THE GOLDEN AGE



Dutch East India Company



## THE DUTCH COLONIES

Slavery had a major impact on the Dutch Golden Age. This period of yoke gave rise to a certain **sense of guilt** among the Dutch people about their native history.

Wealth and greed drove the Dutch to discover new horizons. The merchant fleet, known as the **Dutch East India Company**, was formed in 1602 and quickly took over the trade and shipping routes east of the Cape of Good Hope and west of the Strait of Magellan, becoming the **largest trading company of the 17th century**.

A second Dutch company, the **West India Company**, traded with Africa and the Americas and was at the heart of the triangular slave trade. Sailors working for these two companies conquered vast territories, including Western Australia and Tasmania, New Zealand, Malaysia or Sri Lanka.

While searching for the Northwest Passage on behalf of the Dutch East India Company, the English explorer **Henry Hudson** arrived in 1609 on the island of Manhattan, which the Dutch settlers named **New Amsterdam**.

**De Scheepjongens van Bontekoe** is a book and a movie inspired by the ripping adventures of three boys who travel to the East-Indies. A must-read in Netherlands and good source of inspiration for a show about the Age of Sail.

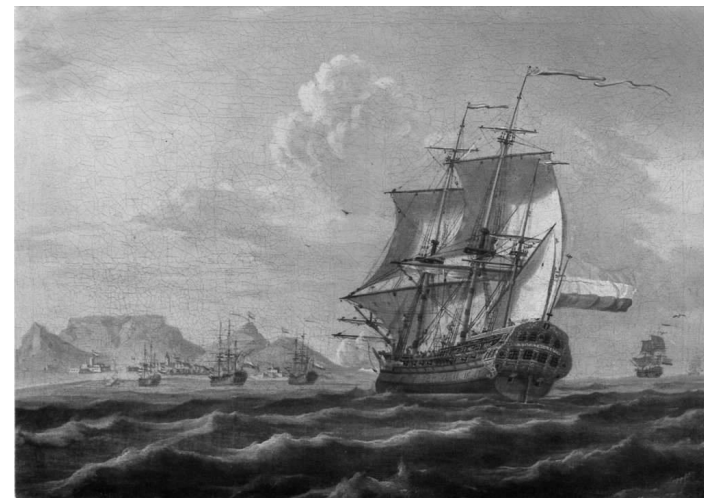
# THE GOLDEN AGE

## THE NAVIGATORS AND THE GREAT DISCOVERIES

The Dutch navigators of this period became very proficient with maps and atlases and became ones of the most experienced in Europe. They discovered routes, founded cities, conquered new territories. These great discoveries reveal a legendary and mysterious breath where the heroes of the sea may manifest their genius or experience dramas.

Some of them are worth mentioning:

- ▶ **Abel Janszoon Tasman** (1603-1659) was the first to cross the Pacific in 1642 to reach Tasmania, New Zealand and Tonga, and reached Fiji in 1643.
- ▶ **Willem Barentsz** (1550-1597) discovered New Zealand in 1594, while crossing the Arctic seas to reach China. He also discovered Spitzbergen in 1596.
- ▶ **Cornelis de Houtman** (1565-1599) left for the East Indies, the islands of Java and Sumatra where he founded the first European trading posts after discovering a new route to Indonesia.
- ▶ **Pieter Stuyvesant** (1610-1672) was the general manager of New Amsterdam from 1647 to 1664.



# THE 19TH CENTURY



A series of antagonisms between the House of Orange-Nassau and its democratic opponents led to a **civil war in 1785**. The situation worsened when **Napoleon** renamed the territory "Kingdom of Holland" and established his brother, Louis Bonaparte, as king in 1806.

From 1806 to 1811, during the time of the **Kingdom of Holland**, the government of the Indies was entrusted to Marshal Daendels, a supporter of the patriotes. When the Dutch king abdicated in 1811, the country was annexed by France.

The **Kingdom of the Netherlands** was in fact founded at the **Congress of Vienna in 1815**. It included the present Benelux territories and the Dutch colonies.

From 1816 to 1829, the Dutch regained control of the Indies, but remained undecided on economic policy. The **Java War** followed (1825-1830). The **independence of Belgium** forced the Dutch to develop their own industry from 1830 onwards. They remain then a neutral country for the rest of the century.

# 20TH CENTURY

The Netherlands continued its policy of neutrality during the First World War. In the **1920s**, the growing wealth of the middle class led to a **surge of liberalism**. The Netherlands embarked on innovative social programs, focusing on poverty reduction, women's and children's rights, and education.

During the **Second World War**, neutrality is not possible anymore. The Germans destroyed much of the centre of Rotterdam and the Dutch rallied to focus on their country following material deprivation and the trauma of the Second World War.

It is followed by a **period of decolonization**, especially of **Indonesia**, which was lost to the Japanese during the war. The conflict began in 1945 and gradually ruined the Dutch economy. It ended with the formal transfer of sovereignty on 27 December 1949.

The number of colonists returning to Europe, which most of them had never known, was relatively small. As a result, **the colonial memory fades** rapidly as this population integrates or even disappears.



# FOCUS: WORLD WAR II



The Netherlands tried to remain neutral during the Second World War, but was invaded by the Germans in May 1940. The Germans destroyed a large part of the centre of Rotterdam in an attack designed **to force the Dutch** to surrender. This they did. The **Dutch Resistance** was passive at first, but when thousands of men were sent to Germany as forced labour, **the Dutch Resistance** became more organized. An even worse fate awaited the country's Jews. The "**hunger winter**" of 1944-1945 was a time of deep despair. The British-led Operation Market Garden had failed and the Allies had stalled.

The Germans increased the plundering of **Dutch resources**, including a food plan, which led to a general famine. In May 1945, the ordeal ended when Canadian troops liberated the country. After the war, the Netherlands remained economically and spiritually shaken. The trials of **war criminals** began and 66,000 people were found guilty of collaborating with the **Nazis** (900 were sentenced to death). However, the number of collaborators was much higher, and many of them, such as the person or persons who denounced Anne Franck's family, were never tried. On the other hand, many **Dutch people** risked their lives to help Jews during the war, and 5,851 of them were recognized as Righteous Among the Nations.

# HISTORY OF DRENTHE



**Drenthe** is the least populated and least urbanized province in the Netherlands. The province is riddled with peat ponds and small canals used to transport peat.

After the Republic of the Seven Provinces declared its independence in 1581, Drenthe became part of the United Provinces, but only **gained provincial status in 1796 due to its poverty.**

In addition, the **history of Drenthe** has always been marked by **peat colonies.** They began to form in the 18th century and developed on a larger scale after 1850. The dried peat became turf, a fuel that supported the growth of the large Dutch cities.

# HUNEBEDDEN



The **dolmens**, thanks to their unique appearance, have become an **icon of the Netherlands**.

Their original shape earned them the first entry in the canon of Dutch history. The exact interpretation and meaning of these dolmens and the landscape in which they are located are still being studied to this day. These dolmens are mainly found in the **Drenthe region**.

The dolmens of Drenthe were built between 3350 and 3030 BC by farmers belonging to the funnel culture. The name refers to the funnel-shaped ceramic cups that were found in the dolmens.

In the Middle Ages, for example, the megaliths of dolmens were used to build churches and walls. In the 18th century, dolmen megaliths were used to reinforce the dikes of West Friesland. The result is that **over time, almost half of the dolmens were dismantled**. In response, in 1870, the provincial government of Drenthe decided to actively protect the dolmens.

Over the 52 dolmens that can still be found in Drenthe today, 47 are located on the Hondsrug. They are all **open to public**.

# BENEVOLENT SOCIETY

In the early 19th century, **in the hope of eliminating poverty** once and for all, General Johannes van den Bosch, together with a number of prominent Dutch politicians and scientists and under the patronage of Prince Frederik, decided to **found the Benevolent Society in 1818**.

His plan was **to create colonies** where he hoped **to offer the poor a better life** and 'reform' them into self-sufficient citizens.

With the support of **King William I**, the Society of Benevolence purchases several plots of uncultivated lands from North-East Netherlands to what is nowadays known as Kempen in Belgium.

A total of **seven Colonies are created**, the largest of which in terms of area are in Drenthe. The Society selects impoverished families and beggars from all over the Netherlands to be housed in one of the free Colonies.

For the housing of large groups of beggars and orphans, unfree Colonies are built in Veenhuizen, among other places.



# JOHAN VAN OLDENBARNEVELT (1547-1619)



Johan van Oldenbarnevelt was born in 1547 in Amersfoort and died in 1619 in The Hague. When the revolt against Spain began in 1572, he entered into correspondence with **William I of Orange-Nassau** and became his legal adviser. In 1586, he became a lawyer and a grand-pensioner of the States of Holland until his death in 1619.

On the advice of Johan van Oldenbarnevelt, the States General ordered Maurice to take Dunkirk, where pirates were damaging Dutch trade. Maurice considered the risk too great and his army was defeated by the Spaniards for the first time before defeating them in extremis (Battle of Nieuport, 2 July 1600). Maurice returned to the Netherlands furious, considering that **the States General had put the very existence of the young republic at stake** in this affair. From then on, he no longer considered Van Oldenbarnevelt to be his guardian. In 1602, the Grand Pensionary established the Dutch East India Company (VOC), which led to the rapid growth of Dutch power in the 17th century. On 29 August 1618, **Maurice of Nassau arrested Johan van Oldenbarnevelt** and his supporters, including Hugo Grotius, for high treason. Van Oldenbarnevelt declared in his defense that he had only acted in the interests of Holland. His judges found him guilty of high treason against the union of the United Provinces. **He was sentenced to death** on 12 May 1619. The next day, he was beheaded in the Binnenhof in The Hague.



# CONTEMPORARY PERIOD



Life in the peat colonies was hard. There was great inequalities between the different social classes, with the peat workers and the agricultural workers forming the lower stratum. After the Second World War, the **peat industry** collapsed.

In the course of the 20th century, many canals that had fallen into disuse were filled in. Because of their ribbon-like shape (sometimes double), they can be recognized as former peat colonies in the landscape. After the war, the Netherlands began to rebuild. Drenthe too. The province was modernized at high speed. Land consolidation was introduced. In order to be able to work the land more efficiently, farmers exchanged their small plots with each other to create large individual plots. **The vast corn and grain fields on the edge of the Drenthe**, crossed by straight roads, are visible examples of this.

Shortly before the outbreak of World War II, the Dutch government built a camp near the town of Hooghalen to accommodate German Jewish refugees. This was the **Westerbork camp**. Anne Frank was deported on the last train out of this camp.

# FOCUS: THE SIEGE OF COEVERDEN



The siege of Coevorden took place from June 29 to July 11, **1672** during the Dutch War.

The town was besieged by the troops of the Bishop of Münster, Christoph Bernhard von Galen, and captured.

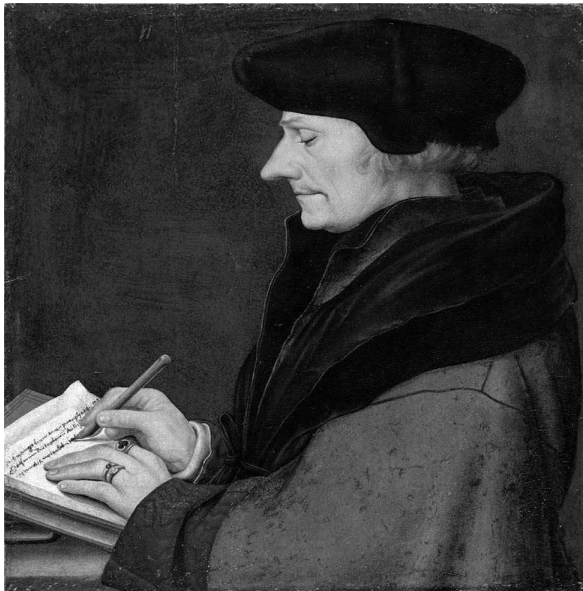
In the same year, Lieutenant General Carl von Rabenhaupt recaptured the town with the help of the attack plan of the sexton and schoolmaster of Coevorden, Mijndert van der Thijnen. 1672 was the Year of Disaster for the Republic of the Seven United Provinces of the Netherlands.

It was at war with France and England. Due to the absence of governor, many fortresses fell into disrepair and this allowed the French armies to move quickly to Utrecht.



*De bestorming van Coeverden, 30 december 1672,  
Pieter Wouwerman, 1672-1682*

# ERASME (1467-1536)



This Dutchman, who was never destined to be famous, had an astonishing adventure. His contemporaries made him the "**prince of humanism**" and posterity only knows the title of his book, **In Praise of Folly**.

A major figure of Christian humanism, he was one of the oldest intellectuals of the 15th century. A **virulent satirist**, Erasmus acquired European fame thanks to numerous writings, the most indisputable of which is *Encomium Moriae* or *Praise of Folly*, published in 1511. The overall composition evokes that of a homily, urging man to reach God.

A **regular canon** and **Dutch priest**, he improved his education in Paris, then with the English humanists.

Erasmus is very affected by the execution on the scaffold of his great friend **Thomas More**, in August 1535. "*In the execution of More I die myself a little*", he writes to a friend. "*We were two friends having a single soul between us*".

He himself dies in the night of July 11 to 12, 1536. He was buried in the cathedral of Basel, which is now Protestant.

# WILLEM VAN ORANJE (1533-1584)



Willem Van Oranje is particularly illustrious because of his prominent role as leader of the Dutch Revolt. He led the **dissent of the Spanish Netherlands** against Philip II (son of Charles V), which led to the Eighty Years' War. Acclaimed by the Protestants, hated by the Catholics, William of Orange was murdered by a pistol shot by a Catholic, **Balthazar Gerard**, in his Delft residence on July 10, 1584. His last words would have been these, « *God, have mercy on me and my poor people* ».

The nickname of **Taciturn** which was given to the German prince William I of Orange does not seem to predate the 19th century, but it illustrates the secrecy with which this prince surrounded himself in a century of mistrust and intolerance.

Without doubt, there is no personage in the modern States whose action can, to this extent, justify the title of "Father of the Fatherland", nor whose cult is so vivacious. The *Wilhelmus van Nassauwe*, the national anthem of the Netherlands, which is the work of Marnix de Sainte-Aldegonde and dates from 1568, has associated the name of William with the fatherland for four centuries. It dates back to the rallying cry used by William of Nassau during the Eighty Years' War.



# CORNELIS DE HOUTMAN (1565-1599)



Cornelis de Houtman was a **Dutch explorer**. He discovered a new sea route between Indonesia and Europe and launched the spice trade in the Netherlands. At this time the Portuguese empire had a monopoly on the spice trade, Cornelis de Houtman's expedition was an important symbolic victory for the Netherlands, even if the voyage itself was a human disaster. In 1592, traders from Amsterdam sent Cornelis de Houtman to Lisbon to obtain information about the islands from which the spices then consumed in Europe came.

On a second voyage to Asia, for a different company, Cornelis de Houtman and his troops came into conflict with the **Sultanate of Aceh**. He was killed in 1599 in a naval battle against an Acehnese fleet commanded by a woman, **Admiral Keumalahayati**, who according to legend killed him with her own hands.

Although Cornelis de Houtman's expeditions were unsuccessful, it marked the beginning of Dutch expansion into what would later become the Dutch East Indies and Indonesia. In five years, sixty-five Dutch ships sailed from the Netherlands to Indonesia. In **1602**, the Dutch East India Company was established, and the Dutch eventually established their dominance over the spice trade in the Indian Ocean.



*Arrival of Cornelis de Houtman in Banten*

# JACOB VAN HEEMSKERCK (1567-1607)



*The siege of Gibraltar (1607)*

Jacob Van Heemskerck was a **Dutch maritime explorer** before he became the commanding admiral of the United Provinces' fleet at the Battle of Gibraltar. He became famous for his explorations in the **Arctic Ocean** at the end of the 16th century with the aim of discovering the Northwest Passage, a sea route linking Europe to the Far East bypassing Russia from the north. This would enable the United Provinces fleet **to avoid the traditional spice route in the Indian Ocean**, which was controlled by the Spanish.

To this end, he led two expeditions which, although they did not enable him to open up this route, did allow him to discover new lands and venture into previously unexplored waters.

After this voyage of exploration, he was appointed **vice-admiral of the United Provinces fleet** with the task of protecting Dutch ships on their voyage to the East Indies and China.

Later **promoted to admiral**, he **led the United Provinces' navy to victory at the Battle of Gibraltar** on 25 April 1607.

This great victory of the Eighty Years' War costed him life. Indeed, the admiral succumbed to wounds from a cannonball that took his leg.

# MAARTEN TROMP (1598-1653)



*Battle of the Dunes (1639)*

Maarten Tromp, was a **naval admiral** of the Republic of the United Provinces and one of the most prominent in Dutch history. He crushed the Spanish fleet at the famous **Battle of the Dunes** in 1639, where he showed exceptional bravery: in the Eighty Years' War, he defeated a Spanish fleet off the coast of Flanders.

When war broke out between the United Provinces and England, Maarten Tromp had to face the famous English Admiral Robert Blake, who inflicted him a half-hearted defeat in 1653.

During this same Anglo-Dutch, Tromp commanded the fleet at **the battles of Dungeness Portland, Gabbard and Scheveninque**. During the latter, he was killed by a sniper from the rigging of Admiral Penn's ship. Republican influence grew stronger after Scheveninque, which led to peace negotiations with the Commonwealth, and the signing of the Treaty of Westminster in 1654.

**Tromp, "hero of the seas"**, is immensely popular among the Dutch people.

# REMBRANDT (1606-1669)

Rembrandt Harmenszoon van Rijn, (1606-1669) is generally regarded as **one of the greatest painters in the history of European Baroque art**, and the most important of the Dutch painters of the 17th century.

Rembrandt demonstrated that imitation alone does not indicate uncommon genius, but that empathy with the subject can produce a masterpiece when combined with imagination and an innate sense of the dramatic and sacred, in the noble sense of the word. Rembrandt's greatness lies not so much in the **abundance of his religious paintings, but in their power of conviction and their ability to move.**

Rembrandt's most famous works are his group portraits such as "The Anatomy Lesson of Dr. Nicolaes Tulp" (1632) and "The Syndic of the Draper's Guild" (1662). Rembrandt painted **the most extensive series of self-portraits in the history of Western painting**, amounting to sixty paintings and prints.



*Danaë (1636-1643)*

# MICHIEL DE RUYTER (1607-1676)



In 1618, when he was eleven, **Michiel de Ruyter** joined the ship as a **sailor**. Taken prisoner by the Spaniards after an unfortunate naval battle, he managed to escape, crossed France as a beggar and managed to return to Vlissingen.

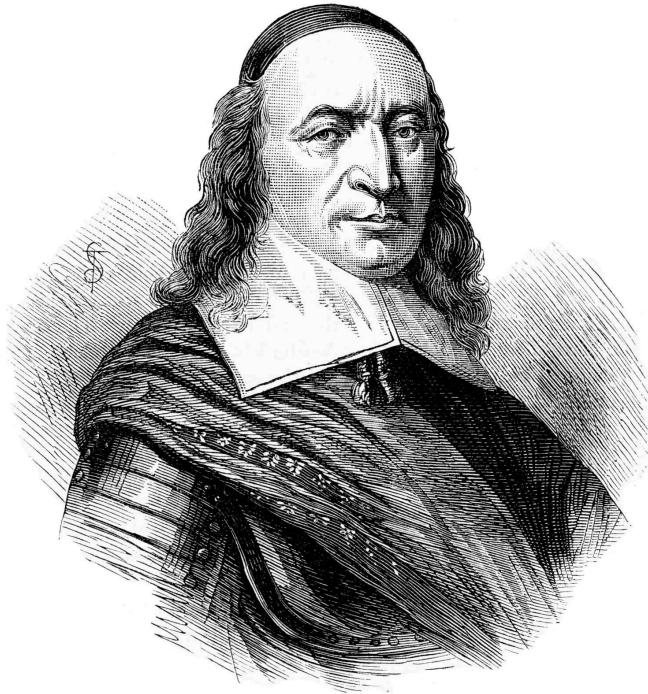
As a pilot he took part in various maritime **expeditions to Greenland, the West Indies and Brazil**. He was given command of a fleet to rescue the Portuguese who had risen up against the Spanish.

In 1652, he defeated the English admiral George Aiscue and led a naval expedition to take the territories on the African coast of Guinea and the island of Gorée from the English. Continuing the fight against the English, he sailed up the Thames and destroyed the English ships in 1667. For his outstanding services, **De Ruyter was appointed lieutenant-admiral, general of Holland**.

In 1672, he **resisted the naval coalition of England and France**, then decided to withdraw. But in 1675, Spain asked the United Provinces to help with their fleet. De Ruyter was appointed admiral of a fleet. In 1676, the naval battle entered its decisive phase. De Ruyter was hit by a cannonball that broke his legs, but he continued to give orders to his sailors and ensured the retreat of his fleet until his last breath.



# PIETER STUYVESANT (1610-1672)



**Pieter Stuyvesant** was born in 1610 in Friesland and died in August 1672 in New York. He was the last Dutch **director-general to administer the colony of New Netherland** for the Dutch West India Company before the English took it over.

After studying at the **University of Franeker** in the Netherlands, Stuyvesant entered the service of the Dutch West India Company. He was then sent as a commercial agent to Fernando de Noronha, an island in Curaçao, the most important **Dutch colony** in the Caribbean. He was then appointed general manager, and devised a plan to capture Fort Amsterdam on the island of St. Martin, from which the Dutch had been driven in 1633 by a Spanish siege. He went there in 1644 and during the battle, he seized a flag of the United Provinces and jumped on the opposing ramparts. His right leg was blown off by a cannonball.

Amputated below the knee, he endured **the siege** unsuccessfully for another 28 days before being repatriated to the Netherlands, where he was fitted with a wooden leg. As the prosthesis was reinforced with silver-metal nails Peter Stuyvesant was nicknamed 'Silver Nail'.

# CHRISTIAAN HUYGENS (1629-1695)



Christiaan Huygens, born in 1629 in The Hague (in the United Provinces) and died in 1695 in the same city, was a Dutch **mathematician, astronomer and physicist**, considered an alter-ego of Galileo, especially for his discovery of Titan, which he described in *The Saturn System* (1659), in which he gave the **first comprehensive description of the Solar System** with six planets and six moons, with a precision that was then unequalled.

For the first time, it is possible to have an idea of the size of the system, the distance of the stars and the exact position of the Earth within it, as well as its exact size, which is much larger than Mars or Mercury, only slightly larger than Venus but much smaller than Jupiter and Saturn. He also built the first pendulum clock, which improved the accuracy of existing clocks from 15 minutes to 15 seconds per day (1656).

**Huygens** is generally credited with playing a fundamental role in the development of modern calculus, in particular for developing the summation and integration techniques needed to discover the isochronism of the cycloid. In the physical sciences, he is famous for the formulation of the wave theory of light<sup>3</sup> and the calculation of the centrifugal force.



# JOHANNES VERMEER (1632-1675)

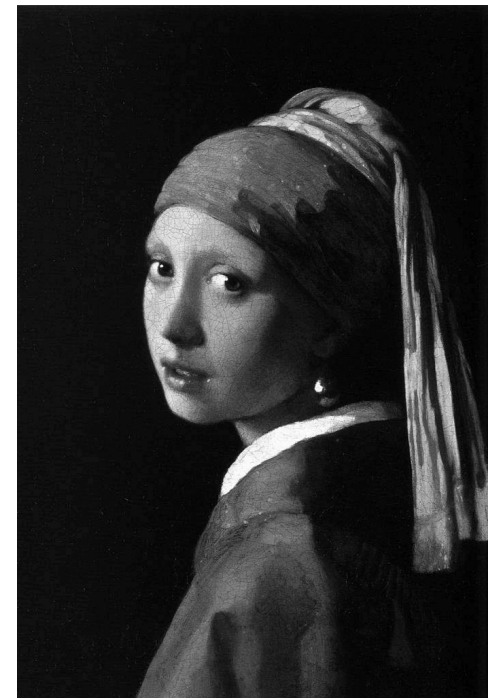


Vermeer is the **lyrical** painter of all. Despite his limited output, he seems to have been entirely devoted to the art of painting in Delft.

The mystery of his work and the shadows that still surround his life have earned him the nickname of the Prince of Delft. Vermeer was primarily a genre painter who liked to depict interiors and intimate scenes.

His subjects are not very varied and almost always relate to a moment in domestic life. An exquisite glow illuminates the scenes with a soft hue. If Rembrandt was the painter of chiaroscuro, Vermeer is the **painter of light**. Crystallized, this light is posed without movement, as if by itself. Vermeer's works often have an impenetrable character. Whether it is his Lacemaker or his Milkmaid, none of them interact with the viewer. They are inward-looking figures, focused on their manual task. Elements in the foreground often prevent the viewer from being tempted to enter this intimacy.

Vermeer's key works are *The Milkmaid* (1658-1660), *View of Delft* (1660-1661) and *The Girl with a Pearl* (1665).



*The girl with the pearl (1665)*

# VINCENT VAN GOGH (1853-1890)



*The Starry night (1889)*

Van Gogh was one of the most cultured and productive artists of his generation. He began his career as an artist in 1880. He also left 902 letters, many of which were addressed to his brother Theo who was his confidant throughout his life.

The famous painter alternated between **phases of intense activity and phases of deep depression**.

The ***Starry Night***, realized at the end of his life, is an evocation of this instability. Suffering from a deep loneliness he will end his life by shooting himself in front of his last painting: ***Wheat Field with Crows***.

Van Gogh became world famous only after his death. Other famous works by Van Gogh include ***The Potato Eaters***, ***The Yellow House***, ***Sunflowers***, ***The Bedroom***, and ***Cafe Terrace at Night***.

From September to December 1883, Vincent stayed in solitude in the gloomy province of **Drenthe** where he worked relentlessly since it seems to be the only remedy he has found to console himself with the departure of Sien, his companion. It is in Nuenen that his genius and talent will be confirmed in an immutable way.

# ANTHONY FOKKER (1880-1939)



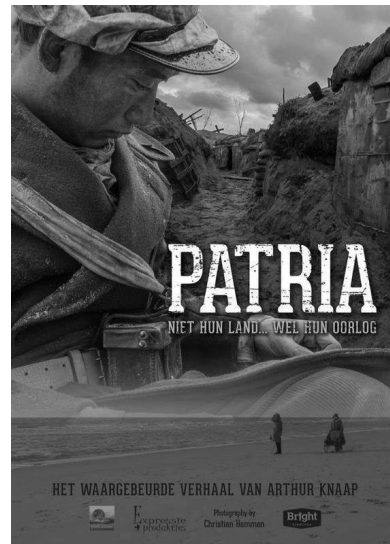
**Fokker** is a Dutch **aircraft supplier**. Formerly an aircraft manufacturer founded in 1912 in the German Empire by Anthony Fokker, one of the pioneers of aviation, the group now develops aircraft components.

The company ceased its manufacturing operations in 1996. Bought by Stork B.V., some of the technical aircraft equipment divisions continue their specialised activities, since 2010 under the name Fokker Technologies.

Fokker develops structures, electrical interfaces and wiring, landing gear, integrated systems and cabin fittings through its various subsidiaries. The group is expanding its activities from North America to China, via Romania, Turkey and Singapore.



# ARTHUR KNAAP (1893-1938)



Arthur Knaap was born in 1893 in the Dutch East Indies, the eldest son of a family of Indian artists. His father Otto wrote music and theatre reviews for Dutch and colonial newspapers.

Around 1910 the family moved to Paris, the Mecca of art. Arthur became a fast and agile man who shared his father's love of music and writing. At the outbreak of the **First World War**, the Knaap family returned to the Netherlands, except for Arthur and his sister Wilma. In November 1914, Arthur enlisted as a **war volunteer because of his 'thirst for adventure, battle fever and love of France'**. Like all foreigners who wanted to fight for France, he joined the Foreign Legion. From mid-December to at least August 1918, he was posted more or less continuously in the trenches and participated in several battles. He was **twice awarded the Croix de Guerre** for his courage in the line of fire. Boy survived the war, but it was a blow to his morale and physique. For the last ten years of his life, he worked as an editor of the socialist newspaper Lepop, founded in 1918. In 1938, Knaap was struck by a serious illness.

On 9 January 1938, he died. According to his family, his premature death was caused by mustard gas, to which he had been exposed in 1918.

A movie has been inspired by his uncommon life.

# ANNE FRANCK (1929-1945)

**Annelies Marie Frank**, better known as Anne Frank, born in 1929 in Germany under the Weimar Republic and died in 1945 in Nazi Germany, was a German teenager, known for writing a diary.

This is recorded in the book « *The Diary of Anne Frank* », written during the two years she lived in hiding with her family in Amsterdam, the Netherlands, then under German occupation, in order to avoid the Shoah. The family left Frankfurt for Amsterdam in late 1933 to escape the Nazi persecution of Jews that had been mounting since **Adolf Hitler** came to power.

In July 1942, as the dangers intensified in Amsterdam, which had been occupied by the Germans since May 1940, the Frank family went into hiding in a secret flat in the annex of Otto Frank's company, Opekta, and her father Otto, the sole survivor of the group, returned to Amsterdam at the end of the war and learned that Anne's diary, in which she recorded her vision of the events from 12 June 1942 to 1 August 1944, had been preserved.

Convinced of the uniqueness of the work, Otto decided to have it published: the original Dutch text was published in 1947 after having had its excessively intimate passages removed.



# ARCHITECTURE



Dutch architecture spontaneously conjures up an image of the tall, narrow middle-class houses typical of central Amsterdam, with their **dark red bricks and long wooden windows** lining peaceful canals.

While the image is correct, it is reductive to summarize the country's architecture in this way, which is far more diverse.

As **masters of construction and use of space**, the Dutch have had a great influence on art and architecture over the centuries. From the first sober cathedrals to elegant modern buildings, their ideas and creations have spread throughout Europe and beyond.

The oldest Romanesque church in the Netherlands is the Pieterskerk in Utrecht. Built in 1048, it was part of the Bernold Cross: the bishop wanted to build a group of four churches arranged in the shape of a cross around the cathedral.

Around 1250, interest in **Romanesque** architecture declined, marking the advent of the **Gothic** era. Broken arches, cross arches and dizzying heights are the characteristics of this new architectural style, which lasted until 1600.

# WATER CONTROL & POLDERS



Faced with the threat of water, the Netherlands has forged a **spirit of solidarity** and **struggle** that is both historical and geographical.

Water is both a threat and an opportunity, and is an integral part of the **Dutch identity**.

Around 1650, the system of dikes and pumping reliably secured almost the entire territory against flooding. The North Sea flood of 1953 necessitated the implementation of the **Delta Plan** to ensure that such a disaster would not happen again. This considerable work was spread over more than forty years.

From then on, survival was assured, and the desire to conquer the waters grew. It was no longer just a matter of defending the land, but of creating new ones.

Moreover, the mills participated in this movement: originally conceived as a survival tool, they became a privileged investment for the merchants of the **Golden Age** by helping to shape the polders. The unique protection system they developed is admired and is a model for those threatened by climate change.



# DELFT BLUE: THE EARTHENWARE



© Le Grenier de la Mandoune

Delft is known throughout the world for its production of blue earthenware.

## In fact, isn't it called Delft blue?

Yet when you visit the museums and workshops, you are struck by the **great variety of colours**: white, green, yellow and even black...

Delft's rise dates from the end of the 16th century, when the local breweries were in decline. Initially, the arrival of Italian emigrants importing majolica with Renaissance motifs, decorated with flowers or birds, developed this activity. But it was the arrival of Chinese earthenware, which was cheaper to manufacture than porcelain, that influenced local manufacturers to produce bright white pieces with Chinese blue decoration. Ironically for a craft that was originally copied from **Chinese porcelain**, the counterfeit Delft pieces that can be found in large numbers in tourist shops today are very often made in China.

# THE FLYING DUTCHMAN



The Flying Dutchman, sometimes referred to in the past as the Dutch Flying Man, is **the most famous of the ghost ships**. This myth has often been used by writers in adventure stories. It is also known by the German name "Der Fliegende Holländer", the latter being the original title of an opera by Richard Wagner. Since 2006, this legend has been used in the famous film saga Pirates of the Caribbean. Sailors of all nations believe in the existence of a Dutch ship whose crew is condemned by divine justice, for crimes of piracy and abominable cruelties, to roam the seas until the end of time.

His encounter is considered a bad omen. The first reference to the legend appears to have been published in 1790 in an account of sea travels by the Scotsman John MacDonald: *Travels in various parts of Europe, Asia and Africa during a series of thirty years and upward*. The storm was so bad that sailors said they saw the Dutchman flying. The most common story is that a **Dutchman arriving in Cape Town on a stormy day wanted to enter the harbour but found no pilot to accompany him, which caused the ship to disappear.**

# PICTORIAL ART

The Dutch masters **Rembrandt, Frans Hals and Vermeer**, among others, are among the most famous and admired painters in the world. These sacred emblems of Dutch painting are part of ancient and modern history: The 15th and 16th centuries saw the birth of the Flemish School: Jan Van Eyck, founder of the Flemish School and the first painter to perfect the technique of oil painting. The Dutch school, characterized by the **predominance of realism over allegory**, was also born at this time.

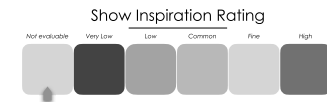
**Painting became a mass product during the Golden Age.**

The eighteenth century is known to have borrowed its entire pictorial style from France. Finally, the nineteenth century triumphs with **Van Gogh's impressionism**, which has left its mark on world culture and is renowned throughout the world.

The Dutch art movement of the twentieth century emphasized the harmony of all the arts by returning to the essence of artistic expression.



# WOODEN CLOGS

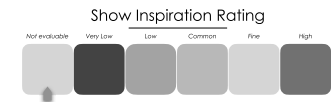


What could be more typically Dutch than a pair of **wooden clogs**? If the accessory has become a tourist item, there was a time when it was worn on a daily basis. Invented in France, clogs appeared in the **polders** as early as the 13th century. The oldest pair discovered to date during excavations in the center of Amsterdam dates from around 1230.

Their success is explained by the soft and abundant wood of the region which allowed an easy and cheap manufacture. A craftsman could produce up to seven pairs a day.

Each craftsman created unique models, both in terms of the painted motifs and in terms of their shape, which they adapted to the trade of the person for whom they were intended. **Today the Netherlands still produces about 6 million clogs every year**, mainly for tourists. A museum is dedicated to them in the village of Zaanse Schans.

# THE TULIP: THE EMBLEM OF THE NETHERLANDS



Although it is not a **craft**, it seems essential to reveal here the emblem of the Netherlands: the tulip.

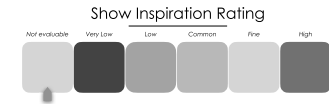
The tulip was introduced to the Netherlands at the end of the **16th century**.

This brightly coloured flower, which originated in Turkey, fascinated the Dutch to such an extent that they speculated wildly about its value: one bulb could be worth more than the price of a canal house. The tulip is such a strong symbol that the Netherlands has a National Tulip Day.

**The Keukenhof garden** is also part of the folklore: the world's largest flower show is held from mid-March to mid-May in Lisse, in the heart of the Dutch bulb fields.



# FOLKLORE



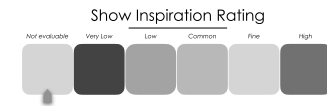
The **folklore** of the Netherlands, often referred to simply as Dutch folklore, includes the **epics, legends, fairy tales** and **oral traditions of the peoples of Belgium**, the Netherlands and Luxembourg. Traditionally, this folklore is written or spoken in Dutch.

In April, everything revolves around the King's Festival. This festival is a tribute to the House of Orange. Hundreds of thousands of participants (locals and visitors) dressed in orange spread out through the streets of Amsterdam to drink and dance.

Then there's the Holland festival: for a month, this mix of elitist and popular art is the country's biggest performing arts festival.

Finally, Rotterdam is home to the world's largest jazz festival. It attracts more than a million musicians from all over the world and a large crowd. The Netherlands has **many musical traditions**.

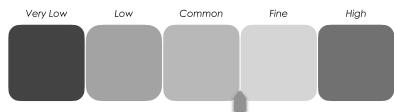
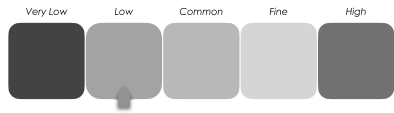
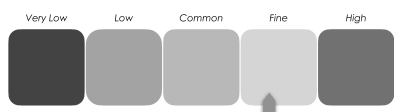
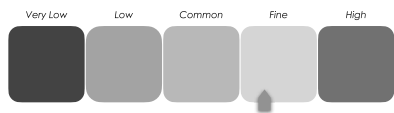
# GASTRONOMY



The **Dutch culinary** scene may not be on the world map, but it is beginning to grow. Copious, hearty, generous are the adjectives that most often describe. With his *Potato Eaters*, Van Gogh perfectly depicted the main ingredient of traditional cooking. There are several traditional dishes that are not to be missed:

- ▶ **Stampot:** a dish made of mashed potatoes and vegetables served with smoked sausage or bacon.
- ▶ **Hutspot:** a stew similar to the hochepot of northern France, with potatoes, carrots, braised meat and spices.
- ▶ **Erwtensoep:** pea soup with onions, carrots, smoked sausage and bacon.
- ▶ **Asparagus:** white and fleshy, mainly grown in Limburg and North Brabant.
- ▶ **Kroketten:** croquettes, stick or cylindrical, made of various ingredients, breaded and fried.
- ▶ **Mosselen:** mussels cooked in white wine with leeks and chopped onions and served with chips.

# ASSESSMENT

Criteria	Assessment	Rating
History of The Netherlands	<ul style="list-style-type: none"> <li>Despite some epic moments, the construction of the Netherlands was above all based on the cardinal values that characterize the Dutch identity, having matured during the Golden Age. This frame is a difficult ground for shows. In addition, the Netherlands are a recent country with a relatively short national history which limits the usable raw materials. Creating a full park about Dutch history will be a challenge.</li> <li>Besides, certain subjects, such as slavery and colonisation, are sensitive and make it difficult to deal with certain periods</li> </ul>	
History of Drenthe	<ul style="list-style-type: none"> <li>The history of the region is too limited to develop an entire park on it.</li> <li>This region was populated rather late and remained behind the history of the United Provinces and The Netherlands for many centuries.</li> <li>The historical facts which may be highlighted do not offer sufficient potential to create more than a show.</li> </ul>	
Major Figures	<ul style="list-style-type: none"> <li>Mainly, the figures of famous painters or sailors could be developed during one or several shows, as a first offer.</li> <li>Other periods and characters could be developed ultimately (80 years Wars, 2nd World War, Batavian Revolt, ...)</li> </ul>	
Cultural Heritage	<ul style="list-style-type: none"> <li>There is certainly a Dutch culture which will allow to create a Dutch atmosphere and then a true Dutch park.</li> </ul>	

# B.

## MARKET ANALYSIS & COMMERCIAL ENVIRONMENT

1. Introduction
2. Resident Market
3. Domestic Tourism
4. International Tourism
5. Competitive Environment
6. Hotels & Accommodation
7. MICE Market
8. Covid crisis
9. Conclusion
10. Rating

# GENERAL CONSIDERATIONS

A tourist is a visitor spending at least one night in the frame of leisure trip, within 2h-drive from the destination. It can be either a domestic tourist (someone visiting his own country) or an international tourist (a foreigner visiting another country).

Regarding **Drenthe**, the main tourism markets to focus on will be :

- ▶ Patrimonial and Cultural
- ▶ Amusement themed Parks
- ▶ Nature retreats



# OVERVIEW



## A DYNAMIC AND EVOLVING TOURISM

In 2019, the Netherlands welcomed a total of **20.1 million foreign tourists**. Strongly carried by **Amsterdam**, accounting for 8.8 million in 2019, this number could peak to no less than 42 million by 2030 according to specialists.

This comes as a result of an incentive orientated policy toward tourism, led successfully by the Dutch Government. Accordingly, in 2018, the sector accounted for **7.2% of the country's total employment**, 4.4% of its GDP and growing.

Innovation and dynamism were keys to seduce more and more new worldwide incomers: **America** (11%), Asia (7.2%) with optimistic forecasts for the upcoming years even if, at this point, Europe and especially bordering countries remain the main market with a whopping 30.3% of **German tourists** (+8.5% in 2018), 12.8% from Belgium and 11.8% coming from the UK.

## A DIFFERENT PERSPECTIVE IN DRENTHÉ

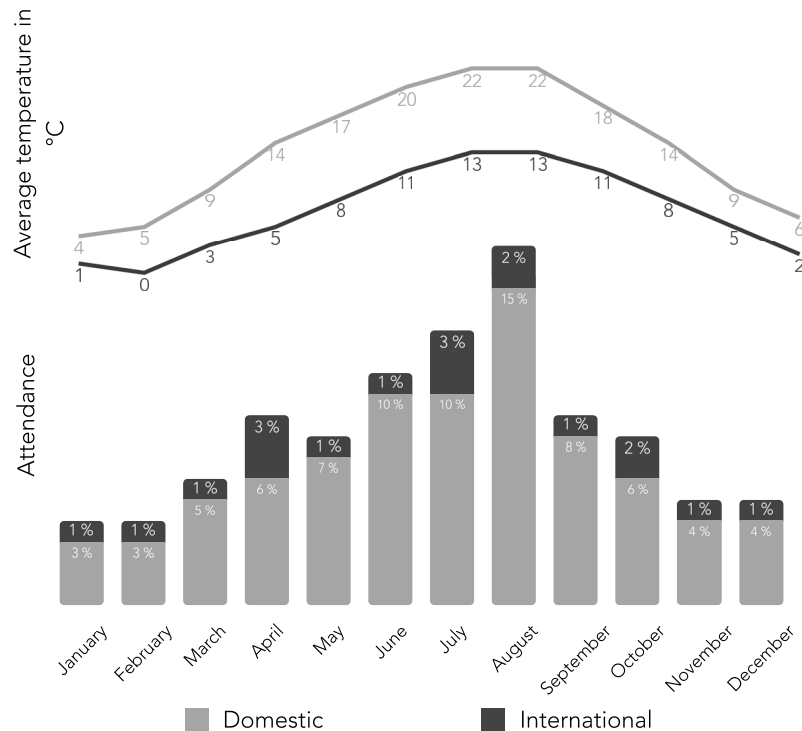
While The Netherlands have a wide tourism offer, **Drenthé's main asset is its environment**. Often seen as a nature jewel, Drenthé's lakes and natural parks drain a mix of families and adventure seekers who have different expectations but a shared interest in reconnecting with the wild life. In 2018, around 2 million tourists visited Drenthé.

Statistically, this translates into **less diversified (98% European) and younger visitors** (One third of the overnight visitors are under 18) compared to the country's average for, globally, a longer expected length of stay.

Drenthé can be seen as a **peaceful retreat destination** with loyal visitors that come back from one year to another. Among the downsides, this side of the Netherlands relies a lot on a saturated domestic market and struggle to reach new incomers from foreign countries. Regarding the Covid crisis, Drenthé presents more resilient results than the rest of the country (cf dedicated part).



# SEASONALITY



## CLASSIC EUROPEAN SEASON

The Dutch tourism market is based on a **high season**. It starts in May and ends in October with a peak in August that represents 20% of the total yearly overnights for Drenthe. **Prices vary accordingly**, especially in the main cities: Amsterdam, Rotterdam where the demand closely equals the capacity. Furthermore, the seasonality matches with not only school holidays, but also flowering and cultural seasons: festivals...

Furthermore, the **link between weather and length of stay** is, more than anywhere else in Netherlands, well established in Drenthe considering the outdoor nature of the activities:

1 visitor out of 2 intends to swim, 35% to go hiking and 18% to go to the zoo without mentioning the cycling interest.

Eventually, while Dutch visitors are majority in August, foreigners are more likely to come in April, July and October.

A **seasonal park** therefore appears as the most appropriate and profitable model.

# THE RESIDENT MARKET



## Assumptions and definition

The resident market consist in people living closely to a destination. Considered as day trippers, distinguish 2 different markets:

- Primary market : between 0 and 60mn drive.
- Secondary market: between 60mn and 120mn drive.

**The resident market is critical for Puy du Fou' success because this market is the one who guarantees a solid, resilient and continuous flow of visitors.** As it is a success condition, Puy du Fou's vision revolves around it: our spectacles are written in the local language and a special ticketing is designed for them: annual pass...

# DRENTHE' SPECIFICITY

## A BORDERING REGION

The particularity of Drenthe is its **proximity with Germany**.

Statistically, no matter where we ambition to locate our Park, **Germany can be reached easily within a 2-hours drive**. With respect to this aspect, the concerned inhabitants should be counted within the resident market.

However, while Dutch and German have 2 distinct languages, **Puy du Fou's strategy, for sustainability and artistic reasons is, above all, focused on domestic native speaker**. Therefore, though **we acknowledge the existence of this specific market** that remains a real opportunity for Drenthe, as expressed by all the marketing campaigns displayed by the province, **in a first time we do not want to rely on this attendance** for the success of our park but rather consider it « a bonus ». Indeed, even if our strategies will not aim toward this direction initially, it can't be excluded that **efforts will be done tomorrow** to benefits from the local administration's work and seize the opportunity.

**To this extent, data will be provided about Germans for information but the focus will be put on Dutch.**



# DAILY TRIPS

## A DYNAMIC REGION

Well anchored within the Dutch culture, the inhabitants are used to undertake very appreciated **daily trips amounting to 1.5 billion in 2015** all over the country. As a matter of fact, it is important to keep in mind that **Netherland's area is resolutely limited:** often going from point A to point B is within a 1-2h driving distance. In Drenthe, it represents not less than 50 million trips yearly.

While those one day vacations are designated to spend **quality time in family (with friends), they do not impact the high season tourism** demand which remains constant. Indeed, the first type follows very spontaneous decisions (often driven by the children wishes) and is not considered as "real" vacations by the holiday maker, unlike the more planned summer holidays.

On average, **26€ are spent per person during those days,** including transport and parking which represent an important part of the budget.



# POSSIBLE LANDING SITES

## CULTURAL, NATURAL AND DEMOGRAPHIC RELEVANCE

What make a location an ideal landing point ?

Driven by Puy du Fou's values and beliefs, we aim to find a **wild and wide site** in order to create a **pleasant and spectacular place** for both the visitors and our animals. While nature is the essence of our strategy, we need a space large enough to « make the magic happen » : building and scenes for our shows.

Economically speaking, the site has to be **strategically located, surrounded by a large potential audience with great logistic structures** (airports, train stations, roads...) that would allow us to welcome million of visitors.

Following a first analysis, we selected 3 potential sites that could match our requirements : **Assen, Emmen and Meppel**.



# ASSEN

**PRIMARY MARKET : 2 257 794**

> 0 TO 30 MN : 663 629

> 30 TO 60 MN : 1 594 165

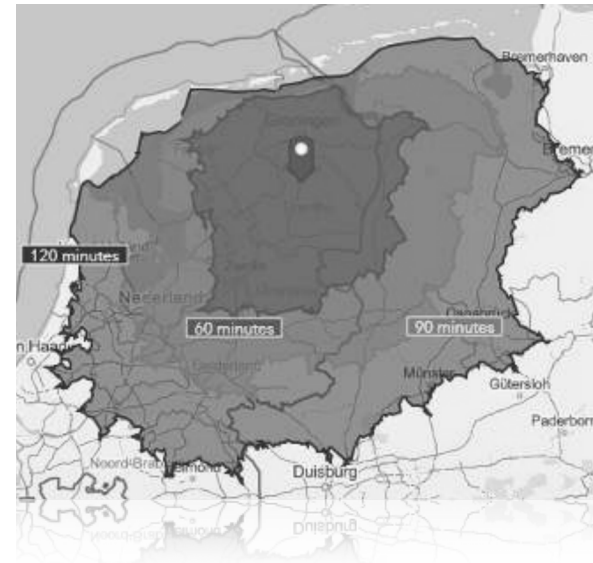
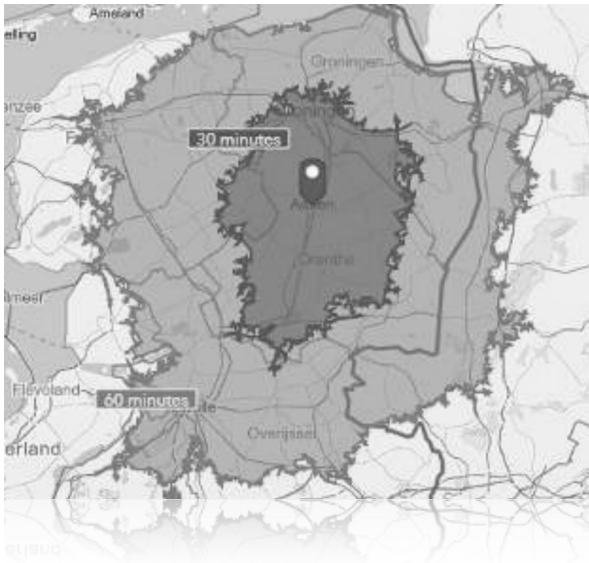
>> **GERMANY** : 196 295

**SECONDARY MARKET : 8 067 868**

> 60 TO 90 MN : 2 425 825

> 90 TO 120 MN : 5 642 043

>> **GERMANY** : 3 709 878



# MEPPEL

**PRIMARY MARKET : 3 677 869**

> 0 TO 30 MN : 642 823

> 30 TO 60 MN : 3 035 046

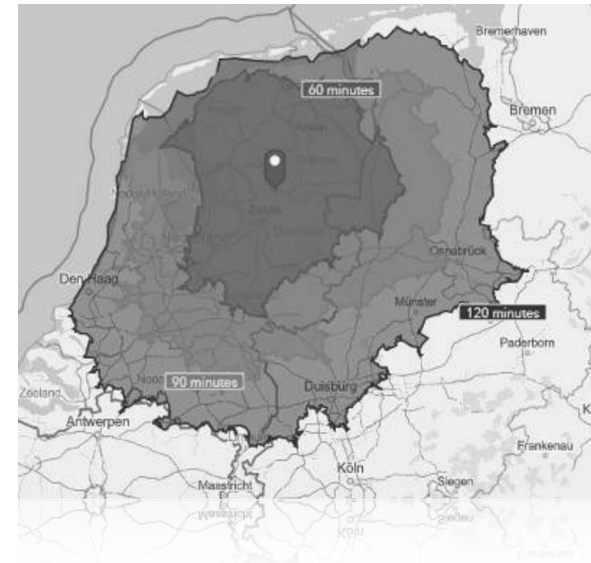
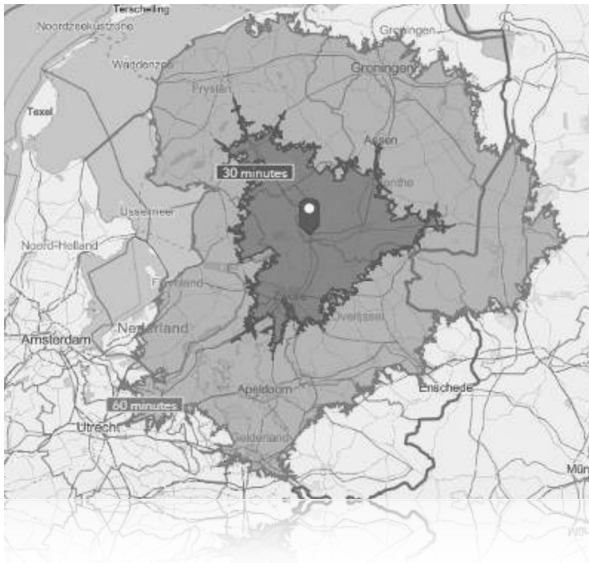
>> **GERMANY** : 108 404

**SECONDARY MARKET : 12 281 156**

> 60 TO 90 MN : 5 774 562

> 90 TO 120 MN : 6 506 594

>> **GERMANY** : 5 605 676



# EMMEN

**PRIMARY MARKET : 2 207 849**

> 0 TO 30 MN : 364 928

> 30 TO 60 MN : 1 842 921

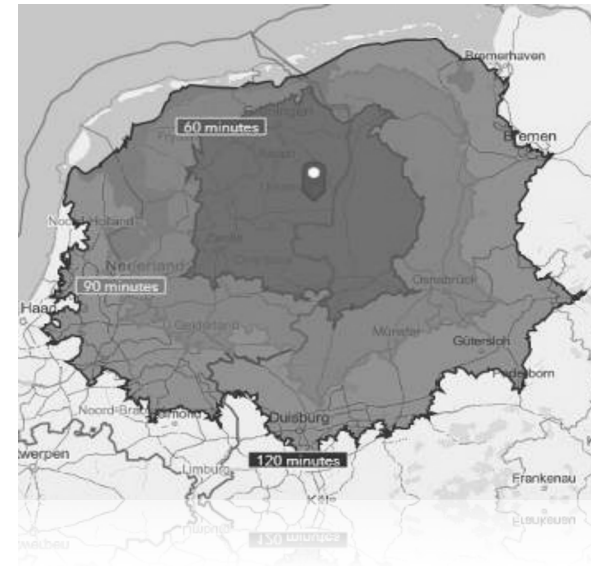
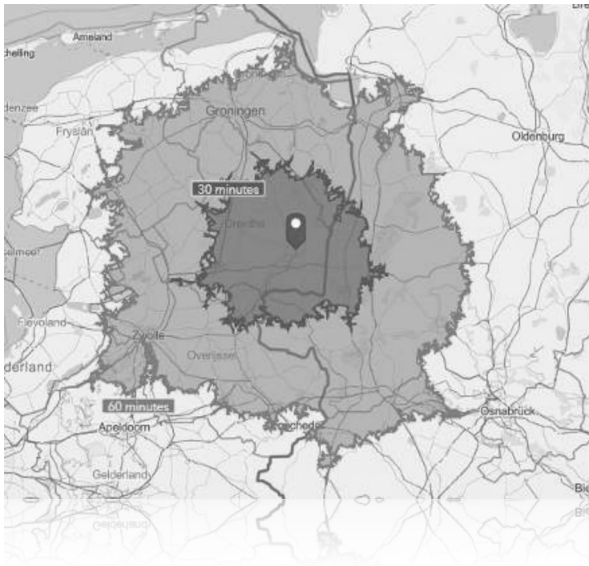
>> **GERMANY** : 1 365 455

**SECONDARY MARKET : 7 867 234**

> 60 TO 90 MN : 2 542 568

> 90 TO 120 MN : 5 324 666

>> **GERMANY** : 7 699 249



# COMPARISON (GERMANY EXCL.)

		Primary Market	Secondary Market	Total / Average
<b>Assen</b>	Per cap Purchasing Power	19,268 €	21,163 €	20,581 €
	Recre. & Cult. Expenditures / Cap	654 €	683 €	675 €
	Household size	2.2	2.2	2.2
	Population	2,257,794	8,067,968	17,129,019
<b>Meppel</b>	Per cap Purchasing Power	20,090 €	21,340 €	20,913 €
	Recre. & Cult. Expenditures / Cap	661 €	687 €	678 €
	Household size	2.2	2.2	2.2
	Population	3,677,869	12,281,156	17,331,148
<b>Emmen</b>	Per cap Purchasing Power	19,726 €	21,149 €	20,729 €
	Recre. & Cult. Expenditures / Cap	654 €	683 €	675 €
	Household size	2.2	2.2	2.2
	Population	2,207,849	7,867,234	17,111,717
<b>On average For the 3 locations</b>	Per cap Purchasing Power	19,695 €	21,217 €	20,741 €
	Recre. & Cult. Expenditures / Cap	656 €	684 €	676 €
	Household size	2.2	2.2	2.2
	Population	2,714,504	9,405,419	17,190,628
<b>PDF France</b>	Per cap Income	20,794 €	20,607 €	20,686 €
	Recre. & Cult. Expenditures / Cap	530 €	530 €	530 €
	Household size	2.4	2.4	2.4
	Population	1,737,419	3,412,274	10,405,711
<b>PDF Espana</b>	Per cap Income	15,572 €	24,829 €	21,709 €
	Recre. & Cult. Expenditures / Cap	543 €	580 €	562 €
	Household size	2.6	2.6	2.6
	Population	3,188,196	5,142,348	10,790,670

Over the demographic data, we identify **similarities with our known markets** : France and Spain in term of group composition. Also, while the proportion of expenditure on leisure is more or less the same over the total revenue, the global amount remains 20% more important in the Netherlands according to the wealth of the country. Eventually, with attendance respects due to the small area of the Netherlands, both **primary and secondary markets offer promising expectations as they reach close to double our experienced territories.**

# A STANDING OUT CITY

## MEPPEL AS DESTINATION.

Regarding the demographic parameters on the resident market, Meppel distinguish itself not only **by a larger potential attendance, but also by the proximity** of main catchment areas.

Indeed, the closer the better as we observe a preferable repartition (mainly primary and secondary composed of) of the market, substantially due to its situation, being near big cities like Amsterdam or Rotterdam.

Additionally, Meppel is well known for **its charm and beautiful surroundings**. Regarded as a cultural-historical centre, at the same time tourists can enjoy the Netherlands' finest landscapes and natural sites : Hunebedden, De Weerribben, De Wieden, Giethoorn... Resulting in **being the best landing place for Puy du Fou among the 3 considered possibilities**.



# DOMESTIC TOURISM



## NOTABLE LEISURE EXPENSES.

The Netherlands is **among the richest countries in Europe**. Consequently we find a higher purchasing power here than in France or Spain with an average leisure expenditure of 676€ giving great perspectives.

As a matter of fact **vacations is very anchored in the Dutch culture** : on average 84 % of the population take a well deserved break through the year and the trend is definitely more and more going toward short and diversified stays. In the meanwhile with respect to pre-covid data , among them, 56 % go abroad and supposedly growing. If this information is capital as in our study, domestic tourism precisely stands for Dutch people spending at least one night within our targeted region, conversely following the Covid Crisis, domestic tourism sparks interest now more than ever.

Thus, while we expect less fluctuations **within Drenthe**, it remains an important parameter that has to be seriously considered as locals is the fundamental basis of Puy du Fou's targeted attendance and strategy.

# DOMESTIC TOURISM IN DRENTHE

## HIGH DEPENDENCY AND REDUNDANT HABITS

Accounting for **87% of the global overnights and representing € 248.7 million in 2018**, Drenthe relies a lot on domestic tourism.

If in 2019 it amounted to more than **6 million overnights**, the market shows saturation signs as the region struggles to renew its Dutch vacationer.

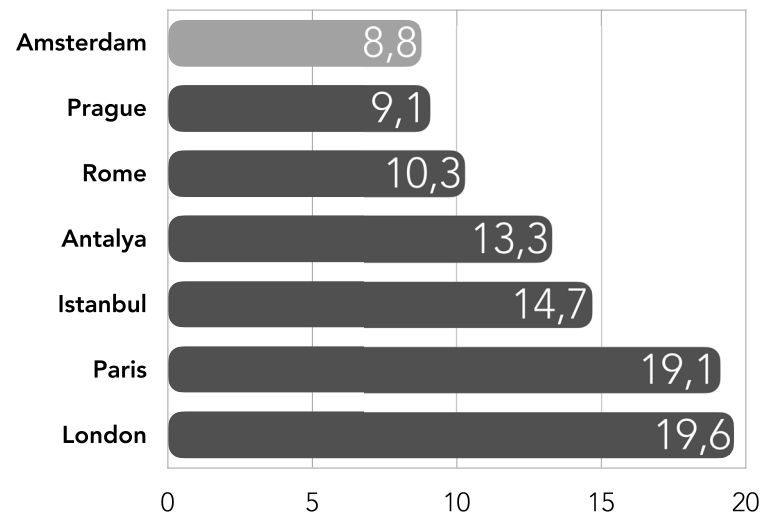
Indeed, with **very anchored habits**, from one year to another we can expect the same population to come over which, with economic respects, can end up being a problem as this type of visitors spend way less money on average (around 16€ per person).

As a matter of fact, if at the moment the **regular visitors**, that is to say people who own a second home within Drenthe, **represents only around 10% of the domestic tourism**, a significant increase of this proportion can not be excluded.



# INTERNATIONAL TOURISM

Visitors in Million (2019)



## A DENSE EUROPEAN MARKET

Europe is by far the most visited continent over the world. With **745 million international arrivals** in 2019, it is common sense to say there is some potential. However, the competition is intense with a wide spectrum of possibilities: architecture, nature, culture, leisure... at any budget depending on the country.

The Netherlands have to deal with strong historical opponents which exhibit similarities: France being the N°1 destination in the world, the UK, Italia, Spain... and new incomers such as Czech Republic and famous Praha which includes great services and folklore at a lower price.

In other respects, southern Europe « resort » countries such as Turkey or Greece drain an important and growing market share mainly due to the local sunny weather and budget friendly activities.

# NETHERLANDS FOCUS

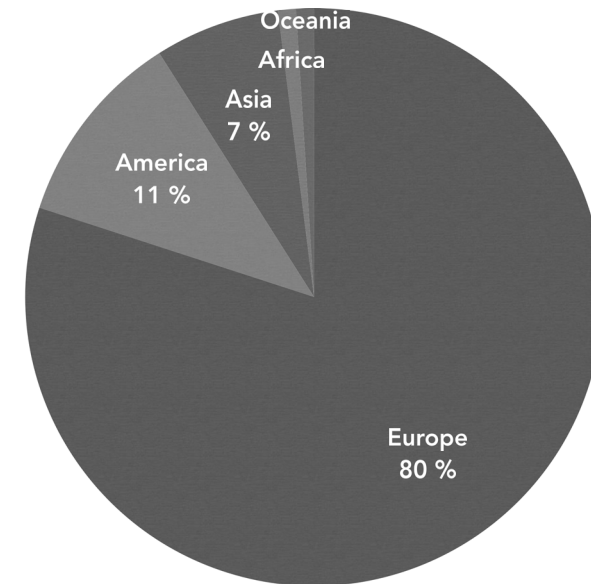
## A HUGE EUROPEAN MAJORITY

In 2019, the Netherlands ranked **26th worldwide** with frequentation considerations. This comes with a remarkable 8% growth on average over the last 5 years, reaching **20 million international tourists**. While tourism is seen as a servant for prosperity and welfare by the government ;

### 4 main axes are identified :

- Promote the Dutch culture
- Improve the livability
- Develop sustainability
- Create employment and enhance the economy.

Dutch people are known for their hospitality, their enthusiasm and strongly believe in the potential of their country. To this extent, they allow themselves **high ambitions for the upcoming years as they place tourism as a priority policy.**



For historical and geographical reasons, Europeans remain the main visitors. Jointly, a **growing interest for culture, architecture and folklore** among the traveler community worldwide (especially Asia) is a to be seized opportunity matching with the Dutch identity.

# HOW ABOUT DRENTHE ?



## AN UNEQUAL TERRITORY

In spite of a **successful international tourism policy**, the Netherlands is in the middle of a complex situation with in one hand saturated cities and in the other one neglected regions. For instance, meanwhile Amsterdam counts 44% of foreigners within its tourists, Drenthe's ones do not exceed 19% and are, as expressed earlier, coming from Europe for 98% of them (67% from Germany).

Even if between 2017 and 2018, **the inbound overnight stays quantity rose by 13%** amounting to 1,134,000 ; the low diversity of the incomers remains a problem.

Among the reason expressed by the specialists :

- **A lack of advertising** for this region toward internationals (even if a successful marketing campaign was led in Germany).
- **Insufficient logistic structures...**

In order to rebalance the market, substantial investments are expected from the Government.

# CONCLUSION ON TOURISM

## THE AVERAGE JOURNEYER IN DRENTHÉ

No matter their origins, tourists in Drenthé have the same profile.

Might he be an harmony seeker or an adventurer, the average journeyer has a **comfortable income** linked with the country's standard of living. At the same time, while he cherishes quality and sustainability, the journeyer is cost-conscious and wants it at a price.

If from time to time he enjoys having a good lunch at the restaurant and visiting a themed park or a zoo, the real essence of his vacation is to rest and **enjoy simple things with friends and family, to reconnect with the nature** as he enjoys a good swim.

All those parameters have to be considered in order to develop the right offer. Luckily it matches Puy du Fou's values and know-how.



# COMPETITIVE ENVIRONMENT



## A FIERCE COMPETITION IN THE DUTCH PARK MARKET.

The leisure offer in Netherlands is **extensive, intense and competitive**.

At this date, while there is barely any Puy du Fou alike offer including historical shows, the level of theming remains very high going from small sized pirate or dinosaur themed parks to big players such as Efteling, the 3rd biggest park in Europe. Additionally, we find numerous of large sized amusement parks (Walibi, Slagharen...) and countless zoos that should be considered as their main targeted audience remains the same as ours: families.

Besides, a very specific parameter of the Netherlands is the low area of the country that should be thought as much as an opportunity as a threat. Indeed, while it makes the potential attendance very large, it also thicken the competition since any location is within a reasonable driving distance: **a consequent demand for a saturated offer**.

# FURTHER SEGMENTATION

## LET'S PUT OURSELVES INTO A VACATIONER'S SHOES

We can easily segment **two distinct types** of trip and in order to analyze the competition, we will put ourselves into a vacationer's shoes.

The first one would be as a **lasting Drenthe stay**. An accommodation for the family is rent for the week and we are looking for a daily trip. Ideally, we would not drive for too long (less than 1 hour) and will definitely pay attention on our spendings : limited budget.

Luckily for us, the Drenthe region is well meshed such that every single place has its share of leisure possibilities. We are going to explore them in a first time.

Then, we will impersonate a **daily tripper**, located within our catchment area to whom the whole country is a space full of wonders included in a decent driving distance.



# WHILE STAYING IN DRENTHE

## A WHOLE DIFFERENT MARKET

Over the Drenthe region, the value proposition differs a lot from Puy du Fou legendary shows. The offer is mainly composed of **Medium to Small sized water sport centers, sensational parks and zoos**. Usually, those are destinations designed to be cheap and to last one day only.

	Type	Location	Attendance / Year	Price (Adult Ticket)	Rating on TripAdvisor
<b>Boomkroonpad</b>	Natural Park	Drouwen	+ 1,150,000	4.50 €	3.5 / 5
<b>Wildlands Aventures</b>	Zoo	Emmen	+ 1,000,000	27.50 €	4 / 5
<b>Giethoorn*</b>	Channel City	Meppel	+ 1,000,000	30.00 €	4.5 / 5
<b>Dwingelderveld</b>	National Park	Ruinen	+ 610 000	Free	4.6 / 5
<b>Aquarena swimming baths</b>	Aquatic leisure center	Emmen	+ 556,000	5.30 €	4 / 5
<b>Drouwenezand</b>	Amusement Park	Drouwen	+ 270,000	15.50 €	4 / 5
<b>Familiepark Nienoord</b>	Amusement Park	Leek	+ 220,000	9.50 €	4 / 5
<b>Molenduinbad Norg</b>	Swimming Pool	Norg	+ 105,000	5.15 €	4.3 / 5
<b>De Drentse Koe</b>	Farm	Meppel	+ 100,000	9.50 €	4.5 / 5

\*Not located in Drenthe, but right on its border. Price indicated is the starting average price to rent a boat for a few hours.

# BOOMKROONPAD



## A NATURE ESCAPE

Very representative of the usual tourism in Drenthe, Boomkroonpad stands in the middle of a wild park.

Starting point of cycling and walking routes, you will find many activities including not only the Tree Top Path (up to 22,5 meters altitude) which allows to discover the nature under a different angle, but also the Green Feather, a 3 kilometers pedagogy oriented path: wood, birds and animals.

Yearly, around 1 160 000 sightseers enjoy this beautiful and relaxing stroll for an average price of 4,50 €.

# WILDLAND ADVENTURES ZOO

## A SPECIFIC AND RELEVANT EXAMPLE

Based in Emmen, Wild Lands Adventure is a recent zoo which opened in 2016. This adventure Theme Park has 4 areas: Jungola (including the world largest zoo jungle hall), Serenga, Nortica and Animazia for a total of over 80 species.

The place involves **many visit possibilities** including a roller coaster and cruises in order to see and greet the animals.

Wildland's approach is **over one day only** (no extra fee for a 2 days ticket). Nowadays the average yearly attendance approximate 1,000,000 visitors for an entrance fee of 27.50 €. It has a high repeating rate among the local population, and welcome few international people, mainly German (100,000)

Alike Puy du Fou, Wildand aims for families. The park, despite a consequent investment and consistent with tourism habits in Drenthe, **does not provide accommodation.**



# DROUWENERZAND



## AGAINST THE CURRENT

Originally designed for kids, this amusement park has its own conception of servicing. After paying a more than **affordable entrance fee** (15.50 €), **everything is included** : more than 20 attractions, beverages, fruits, ice-creams and so on so forth.

This atypical economic model is not the only originality of Drouwenerzand : while a majority of parks in Drenthe renounced to offer accommodations, **anything is possible here** :

- Holiday Park with « bungalows » ranging from basic to luxury
- Glamping : a tree house, themed accommodations...
- Hotel : up to 40 persons.
- Camping area

**Every stay includes a park access.** At this point, it is hard to weight the activities and tell whether the park is just a support to the camp site or vice versa. In any case, considering the relatively low to medium attendance (270,000), its location and its structure, we have some reservations about the viability of the model.

# FAMILIE PARK NIENOORD

## THE MOST REPRESENTATIVE EXAMPLE OF WHAT TO FIND IN DRENTHÉ

Located in a very historical charged site, Familypark nienoord (Huis the Nyenoort) is very representative of the Drenthe leisure offer. The complex offers **family friendly activities at an affordable price**.

Pools, mini golf, a farm and many more attractions are to be found within the park.

Ideally located on a natural site including a water spot, the park provides many alternatives to spend the day and, at the same time, there is not any available accommodation.



# GIETHOORN, THE DUTCH VENISE

## BOAT CRUISES, FLOWERS AND PEACEFUL RETREATS

Located very next to Meppel, Giethoorn is often considered as the **Dutch Venice**. Historically a village dedicated to peat collecting, nowadays the peaceful place stands for small islands linked with water channels. While no roads are to be found, a classic visit would be a boat rent to enjoy beautiful and peaceful landscapes.

The out of time bucolic location attracts more than 1,000,000 visitors (among which 350,000 Chinese) each year, mainly small groups and couples, and it is very appreciated due to the high standards provided both by restaurants and accommodations.

Within a one hour and a half driving distance from Amsterdam, many tour are available and the attendance shows that tourists are willing to make the trip when considered worth it.



# PARTIAL CONCLUSION



## HOMOGENEITY BETWEEN DEMAND AND OFFER

Even if from one place to another the offer might be slightly different, we definitely find **homogeneity in the proposed services**: family friendly attractions designed for any age (actually mostly for children and teenagers), located inside very green spaces, including animals and water spots.

Some very **basic (fast) food, ice creams and beverages are served** for lunch and breaks but yet, except exception, **no accommodations are to be found** as the sites are made up to spend the day and leave : families would return to their vacation stay. Eventually, except for Wildland Adventures Zoo, **no outstanding nor high investment attractions / spectacles were observed.**

# DAILY TRIP COMPETITION

## DUTCH MARKET OVERVIEW

Considering the type of available leisure centers over the Drenthe region and what has been expressed before, we have all the good reasons to believe that the **main « day trip competitors » are not located within Drenthe.**

Indeed, considering the low driving distance range within the country, by experience and according to surveys, it is more likely that they pick notorious places. That is to say, medium to big sized companies that provide outstanding experiences and have a correlated marketing budget.

With respect to those parameters, we picked the most important competitors and / or some that would have interesting specific characteristics for our case.



# THE BIG 4

The Netherlands host a big 4 in the Themed Park field that holds consequent market shares. Composed of Efteling, Slagharen, Toverland and Walibi, each player offers « all inclusive » formula, that is to say leisure and accommodation with the same objective: maximizing the staying length and the average basket value.

	Driving distance						
	Assen	Emmen	Meppel		Attendance / Year	Adult Ticket Price	Rating on Trip Advisor
Efteling	2H30	2H30	2H00	+	5,200,000	38.00 €	4.5 / 5
Slagharen	0H45	0H35	0H35	+	1,000,000	29.90 €	3.5 / 5
Toverland	2H45	2H45	2H10	+	860,000	31.00 €	4.5 / 5
Walibi	1H15	1H30	0H45	+	800,000	37.00 €	4 / 5
Puy du Fou France				+	<b>2,300,000</b>	<b>37.00 €</b>	<b>4.5 / 5</b>

In a diversification perspective, Business solutions are offered : meetings and congress can be hosted inside the parks with the same added value : **a disruptive environment.**

Eventually, a **low ticket pricing** is a required strategy in order to allow families and groups to afford the visit. In the Netherlands, the basic price has to be nuanced as coupons and leisure premiums are part of the strategy and naturally, reduce the bill at the end.

# EFTELING



## THE MOST SUCCESSFUL THEMED PARK IN THE NETHERLANDS

Created in 1952, the **3rd biggest European park** (Netherlands number 1) welcome nowadays more than 5.2 million people each year and growing.

While the attendants origins are mainly Dutch and Belgian with a lower amount of French, German and British, the park is putting a significant effort on the Belgium market with more and more advertising over the French speaking population.

Opened all year long and totalizing 36 attractions (including seasonal ones: Christmas...), the multi-awarded park's success is not only due to the originality of the concept: fairy themed spectaculars, but also on the focus put on diversification, nature and innovation. The site includes restaurants, shops, a 3,150 beds complex and a congress center.

Also, **Efteling is a partner for Puy du Fou**. We operate the « Raveleijn » show within the park and therefore have a deep knowledge of their model.

# SLAGHAREN



## THE MOST POPULAR SENSATIONAL PARK

Opened in 1963, Slagharen now greets more than **1 million visitors yearly**.

Located very close to Drenthe, the 3rd largest amusement park of Netherlands is divided in two parts: a resort and a theme park.

It offers around **35 sensational attractions** including roller coasters and water rides, shops, restaurants and accommodations ranging from luxury to basic.

In order to stay competitive and seduce more and more visitors, Slagharen does not hesitate to **emphasize on sustainability** with green spaces and to organize events through the year intended for children.

# TOVERLAND



## A POPULAR YET STRUGGLING PARK

Celebrating its 20th birthday, Toverland is located in the south of the Netherlands, at the crossroads of Germany and Belgium.

Originally an indoor family park, the firm known an **exponential growth through the past two decades**. Nowadays, divided in small themed zones (Magic, Greeks, Celtic, Mediterranean...), water rides, rollercoasters and many more attractions are to be found and were enjoyed by more than 860 000 visitors in 2019.

Alike the competition, green spaces, restaurants and shops are located inside the park yet, conversely from the usual high standard bungalows, a camp site is provided for the overnight stayers.

Toverland is very popular among the Dutch and is even often rated as one of the best park in the country. Paradoxically, **while the park is designed for families, it also suffered from a « childish » image that created reluctancy from a type of attendance**. A new logo and new adult rides helped to solve the problem as it highlights the importance of considering all the family, parents included.

# WALIBI



## AN INSPIRING ECONOMIC MODEL : WALIBI VILLAGE

Created in 1994 and part of a 3 parks complex located in France, Belgium and Holland owned by "La Compagnie des Alpes".

The Biddinghuizen destination has an average attendance over **800,000 visitors yearly**. Alike Slagharen, **35 sensational attractions** including water rides and roller coaster are to be found.

While in Walibi France and Walibi Belgium there is not any possibility to stay on site during the night ; in Netherlands through « The Walibi Village », plenty of accommodations are available to welcome both families and business groups.

To a wider extent, the whole park can be rent and labeled by companies to welcome up to 20 000 persons.

# A SPECIFIC CASE : ARCHEON

## HISTORICAL THEMED PARK

Focused on the Prehistoric, Roman, Vikings and Medieval periods in the Netherlands, it includes spectaculars (warrior fights), farms with animals, old cities with its inhabitants giving lessons: archery, handicraft...and even a museum with collections on display. There are restaurants on the park but no available accommodation.

While their main target is definitely teen-agers (families) with schools partnerships and orientated activities, Archeon also offers business solutions for meetings and exhibitions up to 5,000 attendants. **If Archeon and Puy du Fou added values are not comparable, its growing attendance and the good feedbacks signal an interest toward historical shows.**



	Driving Distance			Attendance / Years	Adult Ticket Price	Rating on Trip Advisor
	Assen	Emmen	Meppel			
Archeon	2H20	2H25	1H45	+ 300,000	23.90 €	4/5

# PARTIAL CONCLUSION

## A NATIONAL TREND

While it is easy to see that the spectrum of possibilities is wide across the Parks in Netherlands, common targets (families) and linked trajectories take shape as they seem to be key to success.

- **The sustainability** : the greener the better.
- **The active participation** of the visitors : not only they want to spectate but rather be part of the show, no matter how.
- **The need for independency** : through resort with bungalows or even takeaway restaurants, the park should allow a certain space of freedom for the visitors.
- **Child orientated** shows and activities: kids hold an important place within Dutch households and have a certain decision power toward vacations: care for them !



# HOTELS & ACCOMMODATION

## Wild Drenthe

While globally in the Netherlands the most common place to stay is the Hotel, accounting for 44% of the overnights, the trend in Drenthe is completely different with only 14% hotel stays. As a matter of fact, it matches the nature and outdoor focused tourism in this part of the Netherlands.

	Number	Capacity	Booking Share (/Total)
Hotels	175	5 974	14 %
Camp Sites	244	67 103	16 %
Holiday Parks	95	29 036	<b>65 %</b>
Groups	97	4 571	5 %

Therefore, not only the average attendant would rather go camping (16%), but essentially **he would prefer booking a bungalow on a Holiday Park**, which represents a whopping 65% of the total overnights.

# HOLIDAY PARKS

Very typical of the Netherlands, Holiday parks are usually **located within natural reserves** or are even built around water spots. Indeed, further than composite bungalows, the Dutch have their own definition which is really **close to real houses: wide spaces with privatized gardens** (cf picture).

Ranging from comfort to extra-luxury, they are built with as much eco-friendly material as possible and designed to spend time inside like « at home ».

In correlation with the expected attendance : family and friends, they have **extendable capacity**: some bungalows can even reach an area of 370 square meter to welcome up to 24 guests. Also, they are thought for every circumstances: baby, animals, disabled person... Pitches for tents and caravans are also provided.

About the **prices: family friendly** as well ! During high season, it should range, per person per night, between 25€ for basic accommodations to €100 for the most luxury ones.



# HOLIDAY PARKS



Apart from the housing, holiday parks include activities to keep the whole family busy.

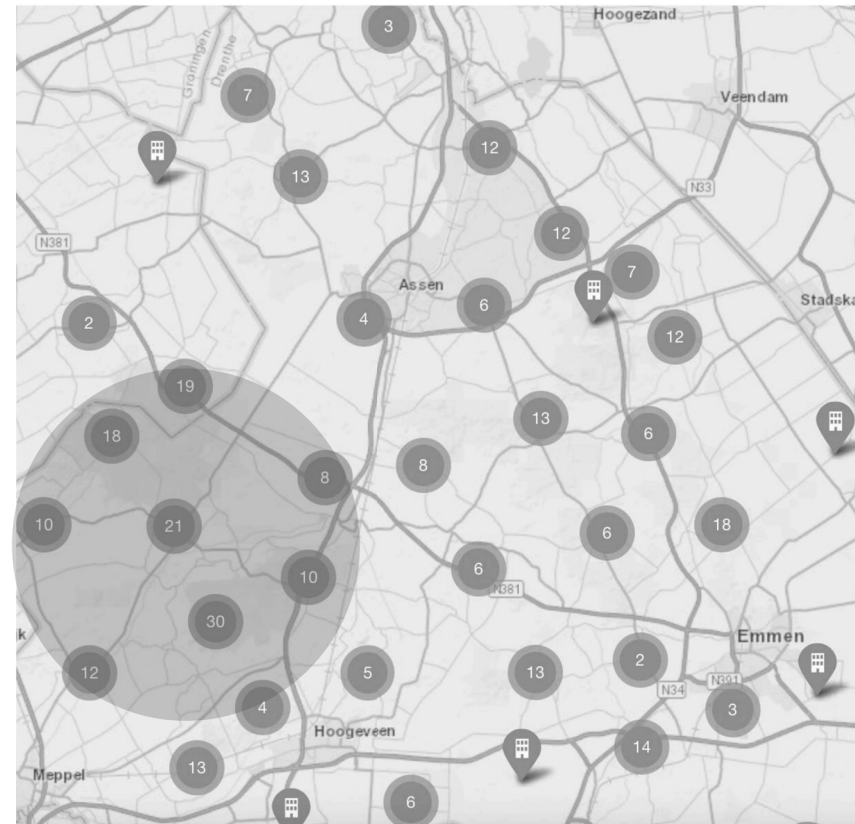
From amusements, pools and playful locations for teenagers to golf, spa and lounge rooms for adults, everything is made such that it is not necessary to leave the site to enjoy a nice stay.

In the meanwhile, interest points should be within a decent driving distance to widen the visitors' freedom and diversify the possibilities.

**All the parameters that define holiday parks come with the independency requirement from the customers. While an hotel is too much, high standards exigency make basic camps inadequate. Embodying this trend, between 2013 and 2018 the overnight quantity increased by 35% while camping decreased by 25%.**

# HOLIDAY PARKS

Naturally, Drenthe is meshed with Holiday Parks in order to satisfy the demand. The repartition is, overall homogenous except for an area between Meppel and Assen. Ideally located next to interest points, the zone also benefits from the very appreciated Dwingelderveld National Park: walking and cycling trails, wild animals including rare birds and beautiful landscapes.



# THE SPECIFIC CASE OF DE BONTE WEVER

Located in Assen, this 4 stars hotel welcomes around 900 000 people per year and benefits from its proximity with the TT Circuit Assen (650 000 visitors / year) that hosts multiple races through the year.

While it delivers **high standards services** and might be regarded as a luxury hotel, its strategy revolves around **accessible prices** dedicated to mid-class families.

Accordingly, the hotel developed its offer in order to **fit the local market**. Nowadays more than basic services and rooms,

De Bonte Wever stands for **all inclusive resort**: bowling, pools & sauna, golf, gym, bikes, children dedicated activities...

In Drenthe, it appears that to rhyme tourism with Hotel, the condition is to get as close as possible to what a holiday park would provide.



# PARTIAL CONCLUSION

At this point the conducted analysis reveals a **mature market with its repeating scheme**. Drenthe is classified as a quite region by the tourists, it promises **peaceful quality time for families** as much as beautiful landscapes for nature lovers.

A classic vacation would consist in an all-inclusive stay within a wild environment, punctuated with **activities that should not exceed one day and have a moderate cost**.

Indeed, unlike very crowded areas in the Netherlands, the demographic situation of Drenthe and its economic structure requires the businesses to **apply low price policies** and to, necessarily, address the low to mid class households market. Nevertheless, the **standards remain high** in order to fit a demanding attendance.

Considering the parameters mentioned above, the tourism habits supports the postulate that **a classic hotel offer is not viable** but there is still some room for a major player alike Puy du Fou in Drenthe, and maybe for a concept of historical, very themed, holiday park.



# MICE MARKET



## THE NETHERLANDS, A CENTRAL EUROPEAN POINT

While **544 exhibitions were conducted in 2019**, it appears that approximately 40% of the Dutch market already organizes MICE trips with an increasing tendency.

In 2019, globally, the sector result amounted to **€ 4.7 billion** before dropping to €1.2 billion in 2020 due to the corona crisis. Considering the sanitary situation, the attendance is expected get back to its usual level in 2023.

Internationally speaking, **the Netherlands benefits from an ideal situation within the European continent**. As a matter of fact, it is a central and easy to reach place thanks to its world class airport in Amsterdam.

Then, high quality services and accommodations are definitely an added value to convince the most demanding ones. The main events are often conducted in big cities : not only in Amsterdam with its 4 convention centers but also in Rotterdam, The Hague, Maastricht...

# MICE MARKET



## MICE IN DRENTHÉ, A YET-TO-PROVE MARKET.

Drenthé suffers from its **off-center location** : no international airport is to be found and a 1 to 2 hours train ride is needed from the economic center. On top of that, a **lack of high capacity or very high standards buildings** ends to reduce the attractiveness of the region. Indeed, with fewer business related places or facilities ; companies are less willing to come over.

In 2018, Drenthé welcomed around 350 000 business linked overnight stays representing 30,2 Million euros ; that is to say an average 85€ spending per capita (parking and transport excluded).

The main asset for Drenthé over this market is its capacity to **offer competitive prices compared to big cities**: up to 3 times less expensive than Amsterdam for instance. To this extent, creating a « worth it » congress center with a low price policy, and an easy to reach situation alike Meppel could generate an interest.

# CORONA CRISIS



## A ROUGH YEAR FOR THE NETHERLANDS

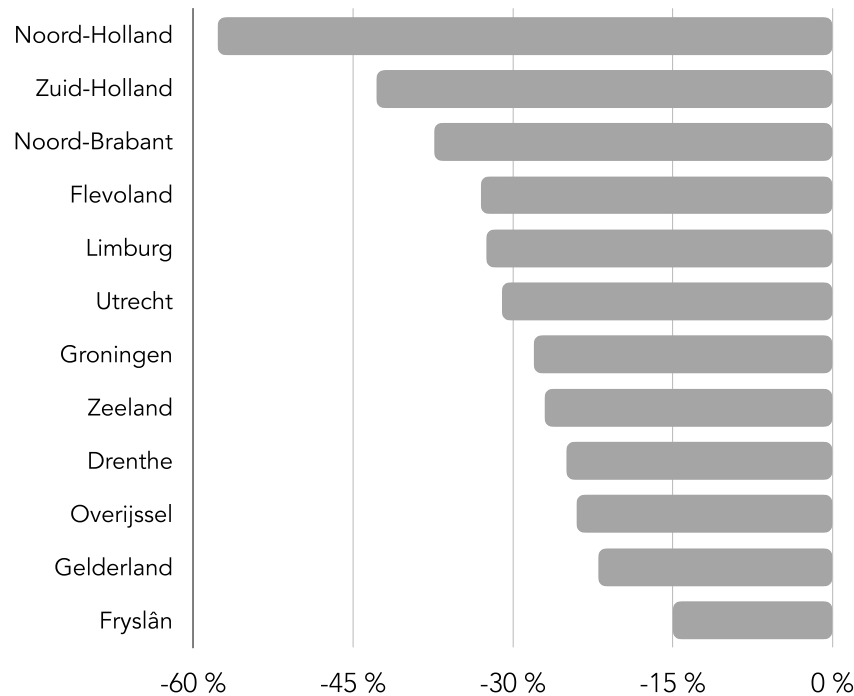
While 2020 has been a complicated year for the tourism sector in Europe and Worldwide, the Netherlands were not spared. Globally, the housing and accommodation sector dropped by 39.9% and the tourism industry turnover by 63.2% compared to 2019.

The most affected areas are naturally the ones who rely the most on international tourism, that is to say the north cost including big cities such as Amsterdam, The Hague or even Rotterdam.

If at the moment restrictions are still in place, a lot of uncertainties remain toward the future evolution which makes forecasting difficult.

# CORONA CRISIS IN DRENTHE

**2020 overnight stays compared to 2019**



## A RESILIENT TERRITORY

On the contrary, the Dutch provinces alike **Drenthe have better withstand the shock**. Not only do they benefit from **larger spaces and more « Covid Friendly » outdoor orientated activities**, but also they **do not rely on international tourism**. Overall, except for the lockdowns, the tourism season has been acceptable.

In Drenthe, the number of guests in overnight accommodations decreased by 25.9% in 2020, widely below the national average. Unsurprisingly, the repartition of loss is unequal : **most of the holiday parks and campsites ended the year with positive results while it has been a disaster for Hotels.**

This good performance can also be attributed to **Drenthe’s loyal domestic attendance** (composed at 95% by Dutch and border residents German), making it a resilient territory against uncertainty. Besides, 2021 is expected to be a great year due to a larger than usual amount of domestic tourism correlated with traveling restrictions. Still, this forecast has to be nuanced under the threat of the airports reopening.

# CONCLUSION

## KEY FACTORS FOR A PUY DU FOU MODEL TO BE VIABLE



The Netherlands definitely presents **encouraging similarities** with what we experience in France and Spain in terms of attendance, of entertainment expectations and expenditure habits. Meanwhile the country area and Drenthe's specificities question the current Puy du Fou model: multiple day visits and hotel stays.

Other alternatives are possible :

- **A one day program** : a quality over quantity based strategy including outstanding shows Puy du Fou signed, for globally a lower price than usual.
- **Puy du Fou as a destination** : very ambitious, the point would be to, more than just catching Drenthe's attendance, be the reason itself of the attendance. If so, we will inevitably have to find the perfect location and provide a high standards holiday park in addition to the magical Puy du Fou's environment.

One could consider those possibilities as complementary steps.

# ASSESSMENT (1/3)

Criteria	Assessment	Rating
Resident Market	<p><b>Fine to High potential.</b></p> <ul style="list-style-type: none"> <li>▶ Although the potential park would be in one of the least populated areas of the Netherlands, it is still inside one of the most densely populated area in Europe. The closer the location is to Meppel, the better, since the most populated area of the Netherlands would be in less than two hours away.</li> <li>▶ Dutch people have a high purchasing power, and spend in average more money in leisure than in other countries in Europe (especially France or Spain). Nevertheless, Drenthe’s inhabitants seem a bit poorer than other Dutch people.</li> </ul>	<p>A horizontal rating scale with five boxes labeled 'Very Low', 'Low', 'Common', 'Fine', and 'High'. The 'Fine' box is highlighted, and a slider is positioned at the top of this box.</p>
Domestic Tourism	<p><b>Fine to High potential.</b></p> <ul style="list-style-type: none"> <li>▶ Drenthe is a destination of choice for a growing number of Dutch people who are loyal to it. The number of repeaters is high: about 60% of the Dutch tourists come twice or more in three year. It could guarantee a solid yearly attendance to a potential Puy du Fou, and a basis for repeat attendance and loyalty.</li> <li>▶ Their expectations for rest and connection with nature could fit with the offer of Puy du Fou. Besides, they are mainly families with children, which are also the targets of Puy du Fou.</li> <li>▶ Even if the journeyer is price-sensitive and wants it at a price, the domestic tourist enjoys a high standard of leaving in line with the national income level.</li> <li>▶ Moreover, the length of stay is high.</li> </ul>	<p>A horizontal rating scale with five boxes labeled 'Very Low', 'Low', 'Common', 'Fine', and 'High'. The 'Fine' box is highlighted, and a slider is positioned at the top of this box.</p>
International Tourism	<p><b>Low potential.</b></p> <ul style="list-style-type: none"> <li>▶ There is not that much international tourists compared to other provinces and places. The German border is not far away, but Germans are looking for a quality of experience, particularly in terms of accommodation, which they do not sufficiently find in accommodations of Drenthe.</li> </ul>	<p>A horizontal rating scale with five boxes labeled 'Very Low', 'Low', 'Common', 'Fine', and 'High'. The 'Low' box is highlighted, and a slider is positioned at the top of this box.</p>

# ASSESSMENT (2/3)

Criteria	Assessment	Rating
Competitive Environment Drenthe Market	<p><b>Fine: there is space to do something</b></p> <ul style="list-style-type: none"> <li>▶ There is a possible lack of quality leisure in the region of Drenthe, except for nature. There is space for a star-destination.</li> <li>▶ There are no worthy competitors in amusement parks market (except Slagharen park which is close to the border of the province in the south).</li> </ul>	<p>A horizontal rating scale with five boxes labeled 'Very Low', 'Low', 'Common', 'Fine', and 'High'. The 'Fine' box is highlighted with a grey background and a small upward-pointing arrow below it.</p>
Competitive Environment National Market	<p><b>Low: difficult environment</b></p> <ul style="list-style-type: none"> <li>▶ The Netherlands, in relation to its population, offers one of the densest competitions in the field of amusement parks, with the Efteling park in the lead.</li> <li>▶ Fortunately, Dutch people are eager of this kind of experience, and there is there is no competitor for the Puy du Fou in terms of permanent, historic and high quality shows.</li> </ul>	<p>A horizontal rating scale with five boxes labeled 'Very Low', 'Low', 'Common', 'Fine', and 'High'. The 'Common' box is highlighted with a grey background and a small upward-pointing arrow below it.</p>
Hotels & Accommodation	<p><b>Fine: there is space to do something</b></p> <ul style="list-style-type: none"> <li>▶ The accommodation market is quite original but corresponds to Dutch culture: mainly holiday parks with bungalows. In the peak season, the percentage of occupancy is very high.</li> <li>▶ It seems there is a particular lack of high-standard holiday parks. Puy du Fou could enter this segment of the market, and distinguish itself thanks to a themed holiday parks.</li> <li>▶ There is a challenge regarding the combination of seasonality with the creation of a holiday park, in terms of capacity and occupancy.</li> </ul>	<p>A horizontal rating scale with five boxes labeled 'Very Low', 'Low', 'Common', 'Fine', and 'High'. The 'Fine' box is highlighted with a grey background and a small upward-pointing arrow below it.</p>
MICE Market	<p><b>Common :there is something to do but being cautious</b></p> <ul style="list-style-type: none"> <li>▶ Drenthe is not popular among the professional. But there may be a way to enter the market with high-end services while keeping prices reasonable.</li> </ul>	<p>A horizontal rating scale with five boxes labeled 'Very Low', 'Low', 'Common', 'Fine', and 'High'. The 'Common' box is highlighted with a grey background and a small upward-pointing arrow below it.</p>

# ASSESSMENT (3/3)

Criteria	Assessment	Rating
Covid Crisis	<p><b>Fine to High resiliency</b></p> <ul style="list-style-type: none"> <li>▶ Like all provinces in the Netherlands, Drenthe suffered from the covid crisis. Nevertheless, it suffered less than most other provinces, probably due to two main factors:                     <ul style="list-style-type: none"> <li>▶ The importance of domestic tourism compared to international tourism (which was almost reduced to 0 in 2020)</li> <li>▶ The offer of Drenthe province for space, nature and resourcing, after times of lockdowns and limitations.</li> </ul> </li> </ul>	<p>A horizontal rating scale consisting of five rectangular boxes of increasing lightness from left to right. Above the boxes are the labels: 'Very Low', 'Low', 'Common', 'Fine', and 'High'. The 'Fine' box is currently selected, indicated by a small mouse cursor pointing to its bottom edge.</p>

# C. ECONOMIC & BUSINESS CONTEXT

1. Introduction
2. Business climate in The Netherlands
3. Business climate in Drenthe
4. Employment Law
5. Show Regulations
6. Administrative Regulations
7. Rating

# INTRODUCTION

If Puy du Fou wants to do business in the province of Drenthe a **carefully risk assessment** is necessary. Key elements that must be assessed are the economics and business climate of the region.

If we look at the economy of the Netherlands as a whole and then zoom on the economy of Drenthe, we get a good idea of what it means to do business in this region. Knowledge of Dutch labor law is also important because **Puy du Fou's shows revolve around human capital**.

In addition, a closer study of the show regulations will give us insight in the possibilities and risks of running shows in the Netherlands.

In this chapter you will find information about:

- ▶ The economy of the Netherlands
- ▶ The economy of Drenthe
- ▶ Dutch Employment law
- ▶ Show regulations

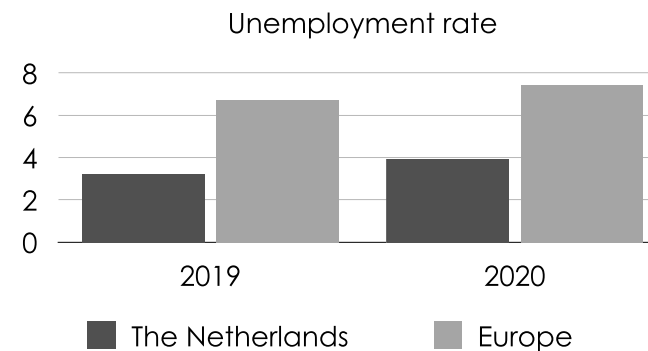
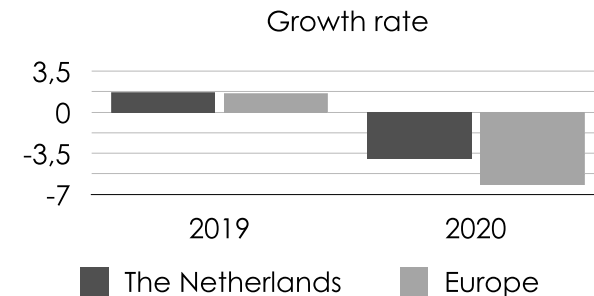


# A STABLE ECONOMY

The Netherlands has a **prosperous and open economy**, which depends heavily on **foreign trade**. The economy is noted for stable industrial relations, fairly low unemployment and inflation, a sizable current account surplus and an important role as a European transportation hub, with Rotterdam as by far the biggest port in Europe and Amsterdam with one of the biggest airports in Europe Transport. The Netherlands has an international focus, a great physical and digital infrastructure and a majority of its inhabitants speaks English.

## Covid 19 impact

The economic impact of the pandemic in the Netherlands was as strong as in other Northern European countries. Therefore, the economy went into a contraction at the end of the year, as private consumption declined again. **For 2021, the outlook is cautiously positive.** Private consumption, but also private and public investments, should pick up again, as the government has extended its current programs for furlough and help for the self-employed, as well as the public credit guarantee scheme until the end of June 2021 (EUR 12.5 billion, 1.7% of GDP). Facing the Covid, the **Netherlands appears to be more resilient than most other European countries.**



# ECONOMY IN THE NETHERLANDS

## A RELIABLE BUSINESS CLIMATE

The Dutch business climate is **progressive**. The Netherlands' infrastructure is among the best in the world, powering business growth through its **sophisticated airports, ports, digital network and rail, road and waterway connections**. Also, the business climate in the Netherlands is reliable, strong and internationally focused. Everyone speaks English. The advanced IT-infrastructure and logistics, the supportive corporate tax structure and the strategic location, which makes it ideally situated for businesses that want to expand their activities across Europe.

After a **record high public deficit in 2020**, the public balance should only improve lightly in 2021, as, on the one hand, corporate and income taxes will generate lower revenues than in former years and, on the other, the government's expenditures will remain high. This will bring the public debt ratio slightly above the Maastricht-target of 60% of GDP. The Dutch current account surplus, however, should recover in 2021.

It is still strongly dependent on the trade in goods surplus, which should improve in line with the main export destinations in the Eurozone, the UK and the US. Moreover, the balance of income, which registered a deficit in 2020, could turn to a surplus again thanks to the recovery in revenues from Dutch assets abroad (net foreign assets reached a record of EUR 267.1 billion in 2019).

	2018	2019	2020	2021 (f)
<b>GDP growth (%)</b>	2.4	1.7	-4.0	3.5
<b>Inflation (yearly average, %)</b>	1.7	2.6	1.3	1.5
<b>Budget balance (% GDP)</b>	1.4	1.7	-7.1	-5.5
<b>Current account balance (% GDP)</b>	10.8	10.2	8.5	9.0
<b>Public debt (% GDP)</b>	52.4	48.7	59.4	61.7

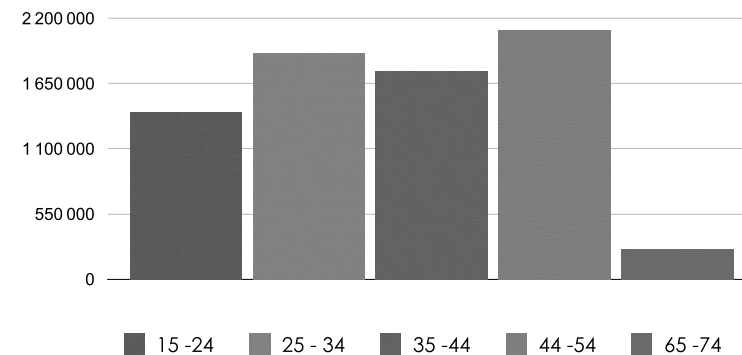
# LABOUR MARKET

From a holistic perspective, the **employment climate in the Netherlands is strong, with low unemployment**, relatively generous wages and pleasant working conditions. This also includes secondary conditions such as decent sick leave benefits, retirement schemes and holidays. The labor market in the Netherlands is characterized by a large share of part-time and flexible work arrangements and labor contracts. The Netherlands is known for stability, cooperation and transparency when it comes to labor relations.

The Dutch workforce is **highly educated, productive, diverse and multilingual**. 90% of the Dutch population is fluent in English and has some of the best English as a second language skills in the world. The Netherlands' ranks high for its **digital skills and outpaces many other European countries when it comes to technology adoption**. In fact, half of the Dutch population (aged 16 to 74 years) have above basic overall digital skills, versus an average of 33% in the European Union, according to research by Statistics Netherlands. This is largely a result of the Netherlands' high standard of education, pragmatic labor laws and commitment to life-long learning.

The total Dutch **working population is 13.1 million** with a total labour force of 9.3 million people. The Dutch labour market is experiencing aging as the total population gets older and there are relatively fewer young people.

Labour Force: Age (2020)



# WAGES

The legal minimum wage in the Netherlands is revised every January 1st and July 1st by the Dutch Labour Law. The wage is based on a **full working week, which can range between 36 hours to 40 hours** per week.

By law, everyone working in the Netherlands between the ages of 15 and stated pension age is entitled to the Dutch minimum wage and a holiday allowance. The actual **minimum wage in the Netherlands is € 1684 gross** on a full-time basis.

The **Holiday allowance must be at least 8%** of the employee's gross yearly wage. This includes overtime, performance premiums, any commissions, supplements for working unsocial hours and payment of holiday days. Holiday allowance is not due over expenses and profit distribution.

Average income in the Netherlands, adjusted for household wealth, is in the end relatively high allowing for a high purchase power and a comfortable standard of life.

## Comparison median net income in European countries

	Median net income 2019
Germany	€ 1,959.58
Austria	€ 2,144.08
Belgium	€ 2,050.67
France	€ 1,880.17
Netherlands	€ 2,051.00
Spain	€ 1,251.25

## Median income in 2021

According to the Dutch Centraal Planbureau (CPB), in 2021 the median gross income for a person working in the Netherlands is € 36,500 annually or € 2,816 gross per month. This comes down to a net income of € 2.175 per month.

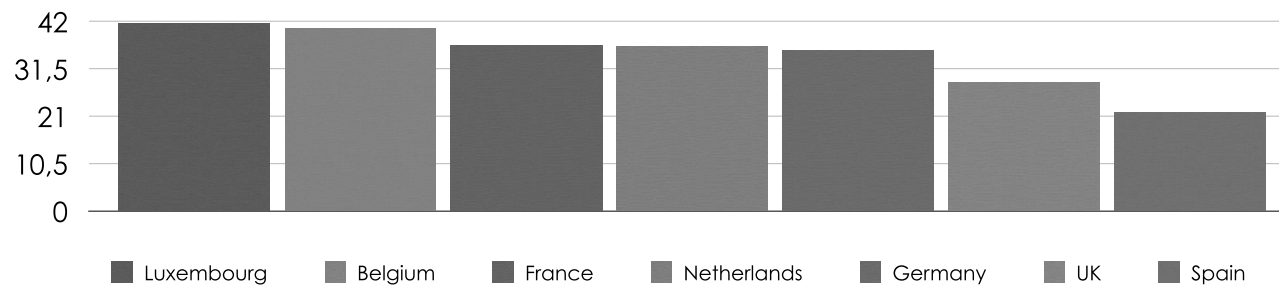
# LABOUR COSTS

Labour plays a major role in the functioning of an economy. From the point of view of businesses, it represents a cost (labour costs) that includes not only the wages and salaries paid to employees but also non-wage costs, mainly social contributions payable by the employer.

Wages, **labor costs and salaries in the Netherlands are in the top tier**, when compared to other European countries.

According to the Eurostat Statistics institute figures, the average hourly labour cost in The Netherlands is of € 36.40 (2019). In 2020, taking into account the family benefits, the tax wedge for the average single worker in the Netherlands was 36.4% while the OECD average tax wedge was 34.6% (2019, 35.0%). The Netherlands had the 20th highest tax wedge among the 37 OECD member countries, occupying the same position in 2019.

Hourly labour costs, 2019 (EUR)



# FISCAL FRAME

## AN ATTRACTIVE FISCAL FRAME FOR COMPANIES

The Netherlands is one of the most attractive of the developed countries in Europe to establish a company. It is advantageous when it comes to taxes on commercial real estate, the rate for electricity and corporate tax. The **corporate tax in 2021 is 15%** up to a taxable amount of 395.000€ and **25% as from 395.000€**.

## THE DUTCH VAT SYSTEM

VAT rates are comparable to other European countries. The normal **VAT rate in The Netherlands is 21%**. For certain goods and services a lower rate of 9% applies, e.g. for food, non-alcoholic drinks, medicines, haircuts, bike repairs, etc. Mainly export is subject to a 0% tax rate. Certain transactions are exempt from VAT. This includes for instance educational services, health care services and various financial services.

## COMPARISON OF TAX RATES IN 2021

Country	Corporate income tax rate	VAT standard rate
<b>The Netherlands</b>	25 %	21 %
<b>Ireland</b>	13 %	23 %
<b>Germany</b>	16 %	19 %
<b>Czech Republic</b>	19 %	21 %
<b>Poland</b>	19 %	23 %
<b>Sweden</b>	21 %	25 %
<b>Italia</b>	24 %	22 %
<b>Austria</b>	25 %	20 %
<b>Spain</b>	25 %	21 %
<b>France</b>	32 %	20 %

# SUMMARY

## STRENGTHS

- ▶ Establishment of home-grown international companies working with a dense network of SMEs is highly attractive for foreign investors
- ▶ Diversified and flexible exports (services have a share of 11.2% in total exports value added) and external accounts in surplus
- ▶ Strong digitalization with lot of home-office, home-schooling and online retail made possible
- ▶ High quality infrastructure and good living standards

## WEAKNESSES

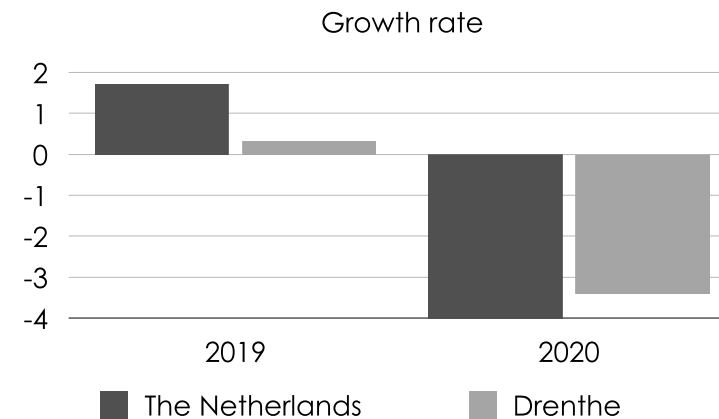
- ▶ Exposure to the European economy, especially Germany and the UK: exports to the United Kingdom generated 3.3% of the country's value added in 2018
- ▶ Debt of private households is very high (236% of disposable income in 2019)
- ▶ Banks dependency on wholesale financing (loans/deposits = 136%) and real estate
- ▶ Aging population; pension system under pressure
- ▶ High labour costs

# ECONOMY DRENTHE

The socio-economic profile of Drenthe can be highlighted using various indicators. For instance, in 2018, the regional gross domestic product (GDP) of Drenthe was €15.1bn, or roughly 1.9 per cent of total Dutch GDP (Eurostat, 2020).

Recent years have seen **little growth of the regional GDP**, with a reported increase of **1.8 per cent in 2017 and in 2018**, which was **below national average** growth rates of 2.9 per cent and 2.6 per cent respectively (CBS, 2020). In that same year, GDP per capita in purchasing power standard units was € 27,200, which is considerably below the Dutch average of € 39,900 and the EU average of € 31,000 (Eurostat, 2020).

In addition, there are **notable intraregional differences in GDP per capita**, with the lowest figures in the northern part of Drenthe, and a somewhat higher GDP per capita in the south-eastern and south-western parts. Overall, **Drenthe has a much less dynamic economy and a poorer population than in the rest of the Netherlands.**



# EMPLOYMENT DRENTHE

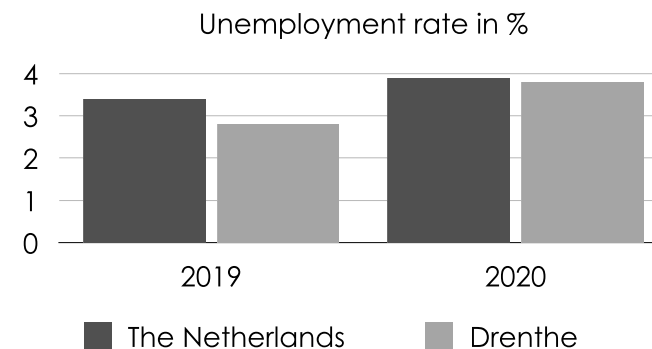
The rate of employment in Drenthe strongly varies per economic sector. For example, employment in 2019 was highest in civil services (30.1 per cent), wholesale & retail trade (21.5 per cent) and in industrial activities (12.0 per cent). In contrast, employment rates were the lowest in real estate (0.7 per cent) and in information & communication (1.9 per cent) (Eurostat, 2020).

Economic activities are mostly **concentrated in the Zuidas-region**, which runs from the city of Meppel to Emmen. A closer look at the economic sectors of Drenthe reveals that there are some distinctive characteristics in their composition. For instance, the northern part is characterized by a relatively large share of civil service activities, whereas the southern part is characterized by industrial activities. In terms of unemployment, Drenthe has the second lowest figure of the Netherlands. **The unemployment rate in 2019 was 2.8 per cent** which is below the Dutch average (3.4 per cent) and the EU average (6.3 per cent) (Eurostat, 2020).

In the past year, the number of employee jobs fell due to the corona outbreak. In the labor market region of Drenthe, this contraction was slightly smaller than nationally.

Despite the corona crisis, a lot of employment was maintained nationwide thanks to government support measures. Still, according to the UWV, there was shrinkage. In September 2020, the Netherlands had 96,000 employee jobs less than a year earlier.

In Drenthe, the contraction with almost 1,000 employee jobs (-0.8 percent) was slightly smaller than the national decline of 1.2 percent. In the province, jobs were mainly affected in temporary employment agencies and in transport and logistics.



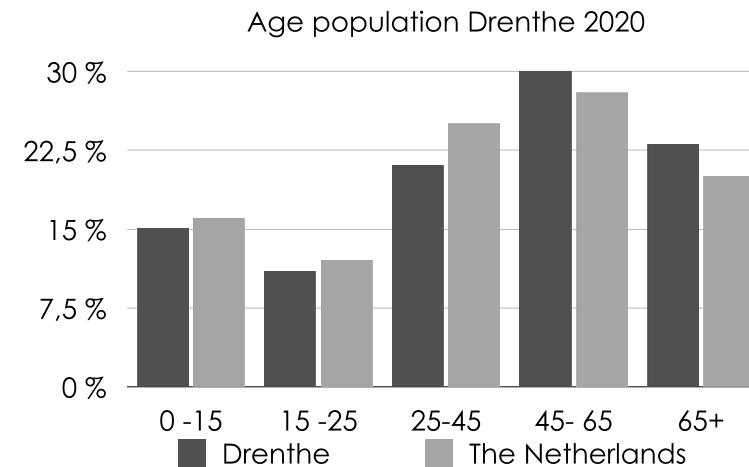
# DEMOGRAPHICS OF DRENTHE

## POPULATION

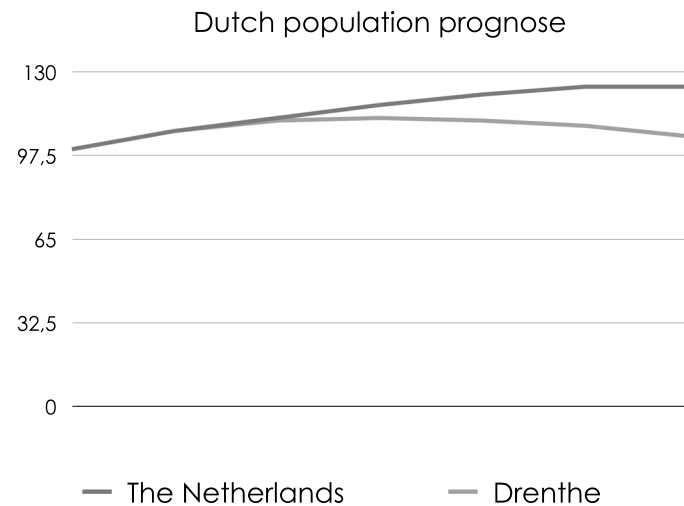
As of January 1, 2020, the Netherlands had 17.4 million inhabitants (Statistics Netherlands, 2020a). **Drenthe, with more than 492,000 inhabitants, is the smallest province in the North.**

The population density in Drenthe is 187 inhabitants per km<sup>2</sup> a lot lower than rural (510 per km<sup>2</sup>). Drenthe is the province with the smallest population density in the Netherlands.

Drenthe is experiencing **dejuvenation and aging**. This means that there are relatively fewer and fewer young people and more and more elderly people. The percentage of Drents aged 65 and older has risen sharply to over 23%. The share of young people in the population is roughly the same as for the whole of the Netherlands, but the number of older people is considerably higher.



# POPULATION OF DRENTHE



Note: The graphic shows the relative population development, taking the size of the population in 1990 as the starting point.

Drenthe is **trend-wise ahead of the rest of the Netherlands**, where shrinkage and aging are also an issue, but less prominent. This is related to the fact that fewer people in Drenthe live in a strongly urban environment.

The trend of **fewer young people and more elderly living in Drenthe** will continue in the future.

Population shrinkage in Drenthe is therefore expected 2020-2050 (-3%) Growth of 7% is still expected for the whole of the Netherlands.

The potential labor force (residents aged 15-75) is expected to shrink by 14% in the North between 2020-2050. Nationally, a decrease of 4% is expected.

# LABOUR MARKET

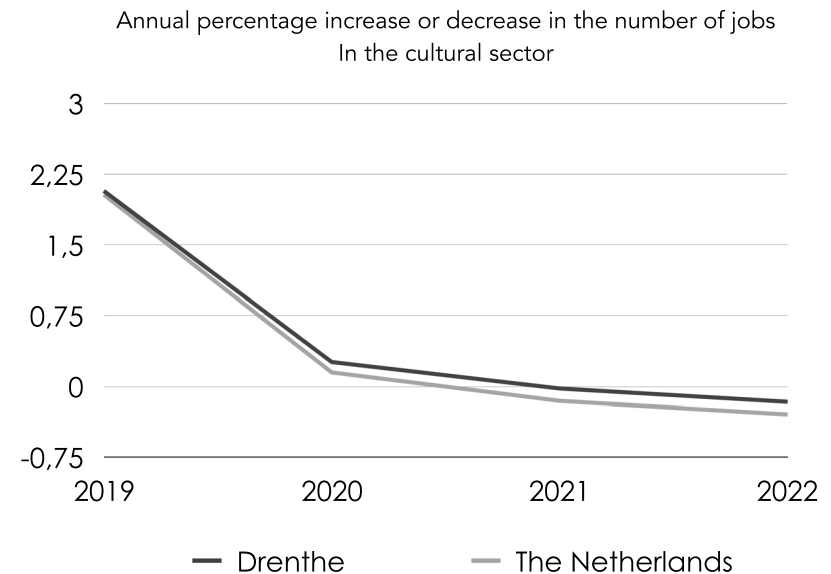
The Drenthe labour market is **mainly to be found in the healthcare** sectors, trade and industry. Almost half of all jobs can be found in these three sectors.

The **leisure sector delivers with approximately 7%** of employment an important contribution to the Drenthe economy.

In 2019, 15,860 jobs in Drenthe can be allocated to the leisure economy. Of which 1,890 jobs were in the Culture, recreation & entertainment (11,9%) (source: marketingdrenthe). Figures on the specific performing arts sector are not available.

Recent numbers of 2020 have not been published yet but the pandemic has clearly reduced this number as this sector was roughly hit.

The province of Drenthe, on the other hand, has made a forecast of the annual percentage increase or decrease in the number of jobs in the sector Culture, recreation & entertainment which can be seen in the following graphic.



# HUMAN CAPITAL

The **knowledge and education level, or the "human capital" of the Dutch population is at a high level from an international perspective.** This applies to both young people and adults. The Netherlands scores well on human capital in international rankings. There is an increasing focus on entrepreneurial skills in education.

Drenthe has relatively more low-skilled people in the working population (24%) than the Netherlands (21%).

And has **fewer highly educated people in the working population than the Netherlands** (29% and 36% respectively) and knows correctly many people with a secondary education level (47%). The national average is 42%.

Drenthe, just like the Netherlands, is faced with a changing composition of the population due to aging and hazing. With that, the working population will decrease in the upcoming years. With the increase of technological dynamics, this leads to new labor market issues.

The province of Drenthe sees the crucial importance and is therefore investing in human potential at all levels of education. The focus has shifted to lifelong development of the working population.

Due to its versatility, **the entertainment and events sector is difficult to approach** because of the diversity in growth and earnings. In 2013, this sector is having a more difficult time. The Theater sub-sector in particular, which also often depends on government subsidies, is experiencing increasing difficulties. Employment prospects for a stage actor are not very high. Few Actors can earn their money with the performances. There are therefore many more amateurs than professional Actors.

Together with parties from the cultural field and fellow governments, the **Drenthe Province has deployed support measures for the cultural sector in the upcoming years.** One of these is a subsidy for the development and/or implementations of new theatre productions.

# SUMMARY

## STRENGTHS

- ▶ Drenthe wages and costs of living are lower than in other parts of the Netherlands.
- ▶ The aging population have a higher disposable income which may be spent on leisure.
- ▶ The Province of Drenthe has deployed measures for the cultural sector.

## WEAKNESSES

- ▶ A shrinkage of the population can lead to a decrease in the labor supply, with the result that vacancies are more difficult to fill.
- ▶ The forecast of the decrease in jobs in the cultural sector is a big risk.
- ▶ There is a potential lack of high profile employees.

# EMPLOYMENT LAW



Unless parties have agreed otherwise, an employment agreement is governed by Dutch law if the employee (whether or not a Dutch national) normally carries out the employment activities in The Netherlands. There are several Dutch mandatory rules of law that apply if the employment is carried out in The Netherlands, regardless of any choice of foreign law in the employment agreement.

Moreover, many companies and branches have a so-called *Collectieve Arbeidsovereenkomst*, CAO (Collective Labour Agreement). This is a written agreement covering working conditions and benefits. A CAO contains supplementary rules for all employees on wages, working hours, supplementary pension, payment during illness, etc. and is binding. The agreements in a CAO are often more favorable than agreements on employment conditions in the law. But the agreements in a CAO may never be in conflict with the law.

The **CAO Drama & Dance** already applies on Puy du Fou Nederland BV and may apply to the potential project.

# CAO DRAMA & DANCE



The current CAO Drama & Dance has a duration of two years, and runs from 1 January 2020 to 31 December 2021.

The Collective Labor Agreement has major differences on a number of points from what is stated in Dutch employment law. Which are more favorable.

The two most important ones are:

- ▶ The maximum number of succeeding temporary contracts
- ▶ Paid leave and holidays

## ▶ CONTRAT OF EMPLOYMENT

As the Puy du Fou park is not open all year round, we like to use seasonal contracts for our employees. The CAO does not provide rules for contracts other than `contracts for (in)definite period` or `on call` contracts. On the other hand, the CAO does offer an exception to the law on the flexibility of the maximum number of succeeding temporary contracts.

### Dutch law:

The dutch law `Arbeidsmarkt in Balans` provides a maximum of 3 fixed-term contracts for a total maximum duration of 24 months, including the intervals, shorter than 6 months, between contracts.

### CAO Drama & Dance:

A maximum of 15 fixed-term contracts for a total maximum duration of 36 months, including the intervals, shorter than 3 months, between contracts.

# CAO DRAMA AND DANCE

## ▶ PAID LEAVE AND HOLIDAYS

Puy du Fou operates 7 days a week during the show-season. This can be a challenge with respect to paid leave and holidays which are considerably more in the CAO drama and dance than in the law.

### Dutch Law

Dutch employees are granted a basis of 20 days a year as paid leave.

### CAO Drama & Dance

In the case of a full contract of employment, employees are entitled every year to at least 104 weekend days or compensation of those days, 27 holiday days, 12 atv days and a maximum of 7 public holiday days, insofar as they fall on a working day.

## ▶ WORKING HOURS AND REST PERIOD

Puy du Fou operates its shows in various time schedules depending on the time of the season. In high season shows can be played 5 times a day with long working hours per day.

### Dutch Law

Dutch employees may work a maximum of 12 hours per shift and a maximum of 60 hours per week.

### CAO Drama & Dance

The employer will organise the work in such a way that the employee does no more than 12 hours' work per shift, followed by an unbroken rest period of at least 11 hours, whereby the rest period may be reduced to no less than 8 hours no more than 10 times per year and 4 times per period of 4 consecutive weeks.

# REGULATIONS



The Puy du Fou experience is very different from other themed parks in the world. Relying only on historical spectacular shows played by humans and animals and using fireworks, the concept is new to the Netherlands.

**Therefore a close study must be assessed regarding the regulations.**

In the Netherlands there are various regulations for show performing that must be taken into account regarding the performing of shows and theatre. All legal and national regulations are described in Dutch legislation. Additional and more specifically for shows and theatre the 'arbocatalogus Podiumkunsten' can be used only as a guideline for rules and regulations for shows and theatre art.

# REGULATIONS

## DUTCH POLICY MAKING

Mutuality and cooperation are the key central elements in Dutch policymaking and public service delivery whereas hierarchy is seen as an instrument of last resort. Local and regional governments (and as a consequence their powers and task areas) are accordingly considered not to be a mere product of central government but to be autonomous constituent components bound to and within the framework of the state.

## DUTCH PROVINCIAL GOVERNMENTS

Each of the Netherlands' 12 provinces has its own regional government, with executive power in the hands of the King's Commissioner (or governor) and the College of the Gedeputeerde Staten. The King's Commissioner is appointed by Cabinet and is responsible to the province's States Provincial (provincial legislature). The legislature is directly elected by the province.

The Netherlands has established strong pillars - an independent judiciary, effective anti-corruption mechanisms and a culture of trust - that all combine to create a society where corruption is not considered a serious problem.



# ANIMALS



Puy du Fou Shows don't exist without **an important role for animals**.

Through its shows and with the utmost respect for animals, Puy du Fou celebrates the age-old bond between humans and animals.

**Animal welfare is a priority for Puy du Fou**, which is committed to caring for all its animals by tailoring its practices to their specific needs, from birth and throughout their life at Puy du Fou, on stage and off.

To preserve and enhance animal species threatened with extinction, Puy du Fou has created its "Animal Conservatory". **90% of the species present in Puy du Fou are likely to play on shows but a good part of our protected animals live near the park.** In total, no less than 1,500 animals are constantly pampered by our tens animal handlers!

Besides horses and birds of prey, animals Puy du Fou care for are donkeys, cattle, goats, camels, rabbits, sheep, pigeons, pigs, poultry, fallow deers, boars and ostriches.

# ANIMALS



**The Animals Act** is a Dutch law that provides an integral framework for rules about **keeping** animals and is respected strictly. In the Animals Act, the intrinsic value of the animal is central. This means that animals have their own value.

Inspection services check whether these rules are adhered to. This is done by the Dutch Food and Consumer Product Safety Authority (NVWA), the National Animal Protection Inspectorate (LID) and the police.

Though, there is no specific legislation with regard to the health and welfare of animals used in **(theater) performances**, the Dutch are very careful with the use of animals in these environments. They are also very keen on the welfare on all kinds of animals.

**Animal activism in the Netherlands has taken off in recent years.** More and more (splinter) groups are emerging and fighting for the rights and welfare of animals. This can be a risk for Puy du Fou for the use of animals in shows.

# ANIMALS

## LEGISLATION

Horses and birds of prey are an essential element of the Puy du Fou show! Without them, there is no outdoor show.

There is **no specific legislation for horses or birds of prey** in The Netherlands. But keepers of horses must comply with the Animals Act and the Animal Keepers Decree to ensure the welfare and health of their animals. Under these regulations, every animal keeper is obliged to keep, care for and house his animals properly. Moreover the Dutch government is paying more and more attention to it.

As of 15 September 2015, the use of wild mammals is no longer permitted in circus acts, or other performances. Transportation of these animals for performance purposes are also banned.

According to the RVO (Dutch National service for enterprising in the Netherlands) exceptions of mammals that are permitted to perform in circus acts or other performances are: donkeys, horses, dogs, cats, cows, sheep, goats, pigs, llamas, alpacas, camels, dromedaries, rabbits, brown rats, domestic mice, guinea pigs, golden hamsters and gerbils.

Species in other animal classes will also be permitted to perform, this include birds, reptiles, amphibians and insects.



# SPECIAL EFFECTS

## FIREWORKS

A fireworks show may only be performed by companies with an application permit issued by the Dutch government. Without this permit it is not possible to use fireworks and Pyrotechnic Special Effects in shows and to apply for the necessary ignition permission.

### **Only certified experts are allowed to set off professional fireworks.**

A business license is mandatory. KIWA issues the fireworks experts with the mandatory certificate of professional competence. A distinction is made between two types of certificates: a "large fireworks" certificate for events and a certificate for special effects with fireworks in theater or film.

You also need a **combustion permit from the province**. The province sets requirements for fire extinguishers, safety distances, packaging, transport and fireworks that have not gone off.

Laws and regulations for the use of fireworks are stated in various regulations. The main ones are:

- ▶ Regulation on the designation of consumer and theater fireworks (RACT). It states which fireworks are for consumers and which are for theater.

- ▶ Fireworks resolution. This contains the rules for possession and lighting of fireworks.
- ▶ Pyro Directive. This contains the European rules and agreements about fireworks.



# SPECIAL EFFECTS

## FIRE HAZARDOUS EFFECTS

The use of open flames, highly flammable liquids and gases and pyrotechnic effects (including fireworks) are in principle prohibited, but can be applied in performances, provided that strict regulations and if the necessary safety measures are taken. For example, additional measures must be taken with regard to fire safety. Fire-hazardous effects must be sufficiently rehearsed. Naturally, the necessary security measures are also required during rehearsals.

All regulation about fire hazardous effect can be found in **the Regulation on the designation of consumer and theater fireworks (RACT)**.

Also, the Working Conditions Act (Arbeidsomstandighedenwet) states in Article 3 paragraph 1 that the employer must take effective measures in the field of fire fighting. Article 6 of the Act states that the employer must carry out an additional risk inventory and evaluation (ARIE) in the presence of very large quantities of combustible substances.



# SPECIAL EFFECTS



## SMOKE EFFECTS

The use of special effects such as; smoke, fog, haze, smoke from heating, smoke from freezing, liquid air, smoke machine and smoke liquid, is permitted provided that the regulations are complied with. The special effects may only be set up, operated and cleaned up by experienced and expert persons. **All equipment must be numbered CE / TUF / TNO certified.**

There are **no specific laws and regulations** for the use of special effects in shows but you will need to draw up a **RI&E**.

The Risk Inventory and Evaluation (RI&E) is a mandatory means for employers to promote health and safety in the company. Every company with personnel must make an inventory of whether and how the work can be dangerous or unhealthy for employees. This must be recorded in writing. The RI&E must also include an action plan (PVA). It describes which measures you will take to tackle the identified risks. Accidents at work from the past must also be included in an RI&E.

# SPECIAL EFFECTS

## DRONES

As of 31 December 2020, national drone legislation has been replaced by a **European system of rules**. The difference between amateur pilots and professionals has thus disappeared. Instead, drone pilots are classified into the Open and Specific categories. The weight of your drone and the type of flights you want to perform with it determines which category you will be dealing with. A permit is mandatory and can be requested from the RDW (Civil service for roadtraffic).

**Puy du Fou has unique and patented drones (Neopter ®)**, transporting enlighten sets and will therefore be categorized in the Specific category.

More stringent requirements are imposed on the pilot, machine and organization. For example, you must request prior approval from the Human Environment and Transport Inspectorate (ILT) for the desired type of flight operations.



# NOISE

There are **lots of rules** regarding noise-standards in The Netherlands. Standards aimed at maximizing noise can be formulated from four different perspectives.

- ▶ Firstly, from the health and safety perspective to protect professionals against noise in the workplace (health and safety rules).
- ▶ Secondly, from an environmental perspective, to prevent nuisance in the environment as a result of noise (environment rules).
- ▶ Third, rules are drawn up based on product safety to protect consumers.
- ▶ Finally, there is the public health perspective to protect visitors from hearing damage caused by music that is too loud.

There are national regulations and legislation for the first three perspectives. From a public health perspective, no statutory norms have been set about maximum noise standards

Noise standards in the Netherlands are **primarily drawn up from the perspective of causing nuisance to the surrounding area** and not from the health perspective of visitors.

So all will depend on the destination plan, the type and location of the sound, source powers and operating times.

Noise standards that are used are usually **around 100 dB (A) on average over 60 minutes** but may differ in all kind of situations. This is why a closer study can only be made when all specific information is gathered.

Law and legislation about noise standards can be found in various regulations:

- ▶ Wet Milieubeheer
- ▶ Wet Geluidshinder
- ▶ Wet Algemene Bepalingen omgevingsrecht
- ▶ Activiteitenbesluit
- ▶ Wet ruimtelijke ordening

# ESTABLISHMENTS OPEN TO THE PUBLIC

**The Dutch Building Decree** (Decree of 29 August 2011 laying down regulations with regard to the construction, use and demolition of buildings Building Decree 2012) is a collection of technical and other regulations that apply to the construction of a structure, the condition of an existing structure and the commissioning or use of a structure. The Building Decree contains regulations with regard to:

- Safety (structural safety, escape routes, fire safety and the requirements for stairs, stair gates and floor partitions);
- Health (ventilation and blowdown, daylight, noise and the discharge of flue gases);
- Usability (presence of sanitary facilities and accessibility of buildings for all public incl wheelchair users);
- Energy efficiency (airtightness, insulation, energy performance and environmental performance);
- Installations (installations that can occur in a building: gas, electricity and fire safety)

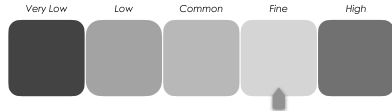
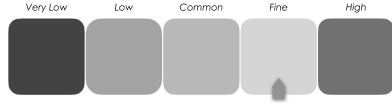
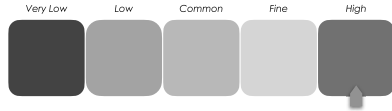
The rules in the Netherlands are strict and will therefore be observed and checked regularly by the Dutch authorities.



# ASSESSMENT (1/2)

Criteria	Assessment	Rating
Business Climate in The Netherlands	<p><b>Fine situation.</b></p> <ul style="list-style-type: none"> <li>▶ The Netherlands perform way higher than the European average including what's already known by Puy du Fou: France and Spain. It translates with higher GDP per capita and a correlated higher leisure expense.</li> <li>▶ Eventually, the economy is more resilient which offers serenity regarding the future and potential new crisis</li> <li>▶ A standard fiscal frame</li> <li>▶ One risk for Puy du Fou is high labour costs. It is comparable to France but the employees benefit from a special subsidized status which does not exist in The Netherlands. Moreover, regarding the prices range on the market, It would be difficult to amortize these additional running costs with an increase in the entrance fee. It will result in a lower profitability.</li> </ul>	<p>A horizontal rating scale with five categories: Very Low, Low, Common, Fine, and High. Each category is represented by a square of increasing lightness from left to right. The 'Fine' category is highlighted with a mouse cursor arrow pointing to it.</p>
Business Climate in Drenthe	<p><b>Low perspective.</b></p> <ul style="list-style-type: none"> <li>▶ Drenthe performs less than the other provinces in terms of economic growth. But it is not really a matter for Puy du Fou. Conversely, knowing the impact following the implementation of a PUY DU FOU on local economies, we can even expect the support from local institutions and economic actors in order to energize the territory.</li> <li>▶ Our biggest fear is on the labor market, for two main reasons, that have been confirmed by our field surveys in the Drenthe leisure venues: <ul style="list-style-type: none"> <li>▶ There is low unemployment rate, combined with a declining demographic. There is already some kind of a workforce shrinkage on the market. It may be difficult to find our employees, particularly the specialized professionals in performing arts.</li> <li>▶ The high qualified profiles are in the big cities and far from Drenthe.</li> <li>▶ Both factors could put upward pressure on wages.</li> </ul> </li> </ul>	<p>A horizontal rating scale with five categories: Very Low, Low, Common, Fine, and High. Each category is represented by a square of increasing lightness from left to right. The 'Low' category is highlighted with a mouse cursor arrow pointing to it.</p>

# ASSESSMENT (2/2)

Criteria	Assessment	Rating
Employment Law	<p><b>Fine perspective.</b></p> <ul style="list-style-type: none"> <li>▶ Thanks to the CAO Drama and Dance, the work flexibility approaches the French model, even if some adaptations will be necessary.</li> </ul>	 <p>A horizontal rating scale with five categories: Very Low, Low, Common, Fine, and High. Each category is represented by a square of increasing lightness from left to right. The 'Fine' category is highlighted with a mouse cursor arrow pointing to it.</p>
Show Regulations	<p><b>Fine perspective.</b></p> <ul style="list-style-type: none"> <li>▶ There is no particular red light according to our analysis.</li> <li>▶ There are some points of attention:                             <ul style="list-style-type: none"> <li>▶ The animals regulation. Not so much because of the current law, but because of the changes it might undergo because of animal activists. Activists are also a risk themselves.</li> <li>▶ The noise regulations. In this respect, we may give priority to a plot on which the noise won't bother the neighbors.</li> </ul> </li> </ul>	 <p>A horizontal rating scale with five categories: Very Low, Low, Common, Fine, and High. Each category is represented by a square of increasing lightness from left to right. The 'Fine' category is highlighted with a mouse cursor arrow pointing to it.</p>
Administrative Regulations	<p><b>High tranquility.</b></p> <ul style="list-style-type: none"> <li>▶ There is no particular red light according to our analysis. Some regulations are European and common with France.</li> <li>▶ In addition, The Netherlands seems to be a country free of corruption problems, with well functioning institutions.</li> </ul>	 <p>A horizontal rating scale with five categories: Very Low, Low, Common, Fine, and High. Each category is represented by a square of increasing lightness from left to right. The 'High' category is highlighted with a mouse cursor arrow pointing to it.</p>

# D.

## PLOT SELECTION

1. Introduction
2. Selection Process
3. Selected Plots

# A KEY STEP

## THE PROJECT FOUNDATIONS

The land selection is a crucial phase in the construction of such a project. It is not to be neglected and the Puy du Fou takes particular care with it, especially as it could remain there for decades. This is why we are cautious and very demanding for good plots.

It is the starting spark, the foundations on which the whole edifice will be built. It is therefore a stage that must be taken care of and which conditions all the following reflections, both in terms of the creation of the park and the attendance forecasts and therefore the business plan.

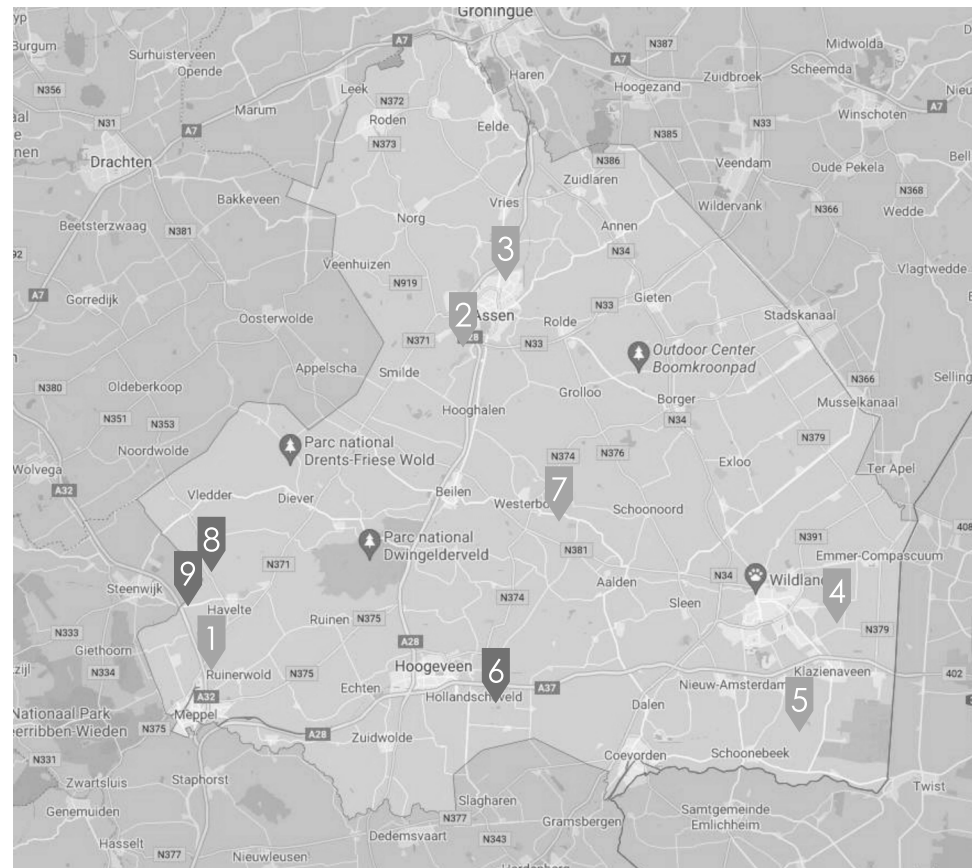
## TWO STAGES

The first stage is a rough analysis, followed then by an in-depth analysis phase (still in progress). The rough analysis phase consists of studying the land according to four criteria: the catchment area, the direct environment, access and environmental assets.

Once a shortlist of land has been drawn up, the second stage consists of an in-depth analysis of the land, in order to check that it is capable of hosting a Puy du Fou park. These criteria cover many aspects, including: the study of the soil, the surrounding nuisance, the presence of risks, the status of the plots and the construction capacities, the local administrative processes, etc.

# LOCATIONS

1	Noord IV (Meppel)
2	TRZ (Assen)
3	Messchenveld 2 (Assen)
4	Rundedal (Emmen)
5	Resort Zuiddrenthe (Emmen)
6	Hollandsche Veld (Hoogeveen)
7	Witteveen (Midden-Drenthe)
8	Westerveld 1 - Holtिंगerveld (Meppel)
9	Westerveld 2 - Darp (Meppel)



# ROUGH ANALYSIS

Location

Catchment Area



Direct Environment



Accesses



Natural Assets







<p><b>01</b> <b>Noord IV</b> <b>(Meppel)</b></p>	<p>Meppel seems to be the better place in Drenthe in terms of combined residential and touristic markets. Giethoorn just near.</p>	<p>1</p> <p>The road runs along the entire length of the property, but it seems possible to create a buffer zone. Noisy annoyances due to the proximity of the highway</p>	<p>3</p> <p>It is well connected to the road network - A32 &amp; A37. There is a train-station in Meppel. No airport in the vicinity</p>	<p>1</p> <p>A Puy du Fou park is a conjunction of History and Nature. Preserved environment is necessary, and this plot does not present sufficient natural assets and beauty.</p>	<p>5</p>
<p><b>02</b> <b>TRZ</b> <b>(Assen)</b></p>	<p>Assen is not the ideal location in the Drenthe, since it is further from the South of Netherlands. However, it is in the center of the North and near Groningue.</p>	<p>2</p> <p>There is an imposing power line in the middle of the field. TT Circuit would cause a lot of noise.</p>	<p>5</p> <p>It is well connected to the road network, just near Assen - A28. There is a train-station in Assen. No airport in the vicinity</p>	<p>2</p> <p>No particular assets to be noticed, except a small grove and a few hedges.</p>	<p>5</p>
<p><b>03</b> <b>Messchenveld 2</b> <b>(Assen)</b></p>	<p>Assen is not the ideal location in the Drenthe, since it is further from the South of Netherlands. However, it is in the center of the North and near Groningue.</p>	<p>2</p> <p>The road runs along the entire length of the property, but it seems possible to create a buffer zone. Noisy annoyances due to the proximity of the highway</p>	<p>3</p> <p>It is well connected to the road network, just near Assen. There is a train-station in Assen. No airport in the vicinity.</p>	<p>2</p> <p>No particular assets to be noticed, except a small grove and a few hedges.</p>	<p>5</p>

# ROUGH ANALYSIS

Location	Catchment Area	Direct Environment	Accesses	Natural Assets
<p><b>04</b> <b>Rundedal</b> <b>(Emmen)</b></p>	<p>Puy du Fou intends to be a true destination, and mainly focuses on residential area. For this very reason, Emmen is a minor place in Drenthe, because it is off-center, and closer to German people, who are less a matter of interest for a Dutch Puy du Fou.</p>	<p>Greenhouses, windmills and photovoltaic panels.</p>	<p>It is 20min far from A37. It is 20min far from Emmen No airport in the vicinity.</p>	<p>No assets to be noticed. Just a land field.</p>
<p><b>05</b> <b>Resort Zuiddrenthe</b> <b>(Emmen)</b></p>	<p>Puy du Fou intends to be a true destination, and mainly focuses on residential area. For this very reason, Emmen is a minor place in Drenthe, because it is off-center, and closer to German people, who are less a matter of interest for a Dutch Puy du Fou.</p>	<p>No particular direct annoyance to be noticed.</p>	<p>No easy direct access. It is 10-15min far from A37. It is 20min far from Emmen. No airport in the vicinity.</p>	<p>Good natural assets to be noticed : a very big lake and a surrounding groove. A complementary field.</p>
<p><b>06</b> <b>Hollandsche Veld</b></p>	<p>The site is located near Hoozeveen, halfway between Emmen and Meppel. It is not optimal but still acceptable.</p>	<p>No particular direct annoyance to be noticed.</p>	<p>The A37 motorway is in the immediate vicinity. However, it will probably be necessary to redevelop the direct access.</p>	<p>No comparable in what was seen in Drenthe. By far the most magnificent plot. A wonderful lake.</p>

# ROUGH ANALYSIS

Location	Catchment Area 	Direct Environment 	Accesses 	Natural Assets 
<b>07</b> Witteveen (Midden-Drenthe)	A bit far from our goal of being the closest to Meppel.  2	No particular annoyance to be noticed  1	Far from any highway. In the middle of the province and not very easy accessible.  3	No particular natural assets to be noticed, except it is surrounded by trees.  3
<b>08</b> Westerveld 1 - Holtingerveld (Meppel)	Good catchment area, close to Meppel. There are 64 holiday parks in the municipality of Westerveld (1.2 million overnights). Giethoorn just near.  1	No particular annoyance to be noticed.  1	Very good accesses. The plot is in the immediate vicinity of the A32 motorway, just after the exit, located  1	Some natural assets to be noticed. A lot of trees, open spaces. No lake.  2
<b>09</b> Westerveld 2 - Darp (Meppel)	Good catchment area, close to Meppel. There are 64 holiday parks in the municipality of Westerveld (1.2 million overnights). Giethoorn just near.  1	No particular annoyance to be noticed. However, there is a military field on the side. What nuisance?  1	Best accesses among the studied plots. This is in the immediate vicinity of the motorway, just after the exit  1	Some natural assets to be noticed. A lot of trees, few open spaces. It is quite varied. No lake.  2

# RANKING

Location	Catchment Area	Direct Environment	Accesses	Natural Assets	Results
Westerveld 2 - Darp (Meppel)	1	1	1	2	5 
Westerveld 1 -Holtingerveld (Meppel)	1	1	1	2	5 
Hollandsche Veld	2	1	2	1	6 
Witteveen (Midden-Drenthe)	2	1	3	3	9
Noord IV (Meppel)	1	3	1	5	10
Messchenveld 2 (Assen)	2	3	2	5	12
Resort Zuiddrenthe (Emmen)	5	1	5	2	13
TRZ (Assen)	2	5	2	5	14
Rundedal (Emmen)	5	5	3	5	18

# HOLLANDSCHE VELD



## Main Strengths

- ▶ Incredible nature : a lot of trees, some relief, and a huge lake
- ▶ Sufficient land capacity
- ▶ Potential support of the city

## Issues

- ▶ Protection of the area
- ▶ Accesses to the plot
- ▶ Already existing « resort » and restaurant
- ▶ Acceptance of the owner of the plot and surrounding areas

# WESTERVELD 1 - HOLTINGERVELD



## **Main Strengths**

- ▶ Beautiful nature, varied landscapes, a bit of water, some trees.
- ▶ Good accesses
- ▶ Support of the city

## **Issues**

- ▶ Protection of the area
- ▶ Already existing activities
- ▶ Sufficient land capacity?
- ▶ Proximity of the road => noise annoyances
- ▶ Acceptance of the owner of the plot and surrounding areas

# WESTERVELD 2 - DARP



## Main Strengths

- ▶ Beautiful nature, a lot of trees with a big glade in the middle
- ▶ Great accesses, right to the highway
- ▶ Support of the city
- ▶ 10mn-drive from Giethoorn touristic hotspot

## Issues

- ▶ Acceptance of the Ministry of Defense
- ▶ Protection of the area?
- ▶ Sufficient land capacity?
- ▶ Adherence of the owners of the surrounding areas

# E.


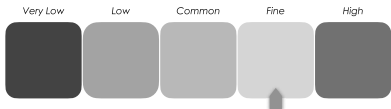
## GENERAL ASSESSMENT

1. Recap
2. SWOT

# GENERAL ASSESSMENT

Criteria	Assessment	Rating
<p><b>A</b> Historical and Cultural Environment</p>	<p><b>From Common to Fine potential</b> The Puy du Fou wishes to be deeply rooted in the history of the place in which it is located. Although the region of Drenthe offers a relatively small historical melting pot, with a low artistically potentiel, the history of the Netherlands, despite its recent genesis, presents enough facts and characters to nourish a park of modest dimensions. We believe that the Dutch culture is strong enough to catch the Dutch visitor's attention, to arouse emotions and to connect him to his history.</p>	
<p><b>B</b> Market Analysis and Cultural Environment</p>	<p><b>Fine potential</b> There is very serious competition in the Netherlands on a national scale, in the leisure market, towards the same targets as Puy du Fou, i.e families. At first sight, Drenthe may not be the natural location for a park. We would rather bet on a more densely populated province. However, Puy du Fou's values may match both with the tourist expectations and the assets of the region. The province also presented strong resiliency against the covid crisis. Besides, still there is nothing like Puy du Fou for historical permanent live shows.</p>	

# GENERAL ASSESSMENT

Criteria	Assessment	Rating
<p><b>C</b> Economic and Business Context</p>	<p><b>Fine environment</b>                      The Netherlands are obviously a good place to make business, and this is true since many centuries. The economic situation is no more problematic than elsewhere in Europe.                      The main concern which clouds the picture is the labor market issue. Will we find the proper workforce at the proper price?                      Still the future may change and the forecasts be disproven, but there is a serious risk for the Puy du Fou not to find the qualifications it needs.                      Besides, it seems that the institutional and legal context does not raise any issue.                      On other hand, there is a latent risk with the actions of animal activists.</p>	 <p>A horizontal rating scale with five categories: Very Low, Low, Common, Fine, and High. Each category is represented by a square of increasing brightness from left to right. The 'Fine' category is highlighted with a mouse cursor pointing to it.</p>
<p><b>D</b> Plot Analysis</p>	<p><b>Fine potential</b>                      Puy du Fou needs a plot that meets some basic requirements : good catchment area and accesses to attract people, natural beauty and no annoyances to immerse the visitor in a great environment.                      Currently, three sites have the capacity to meet these criteria, and could accommodate a Puy du Fou type park.                      Each site has its own advantages. Further analysis is now required.</p>	 <p>A horizontal rating scale with five categories: Very Low, Low, Common, Fine, and High. Each category is represented by a square of increasing brightness from left to right. The 'Fine' category is highlighted with a mouse cursor pointing to it.</p>

# SWOT



PUYDUFOU®

EMOTIONS ARE FOREVER