Research update YEAR 2024

An overview of (research in) the leisure sector of Zeeland

KENNISCENTRUM KUSTTOERISME

Colophon

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1 INTRODUCTION

Why this Research Update?

This is already the third Research Update annual report of HZ Research Centre Coastal Tourism. This time it covers the year 2024. The purpose of this report is twofold. First, it gives an up-to-date picture of Zeeland's leisure sector and its impact on Zeeland. In addition, it brings into focus what HZ Research Centre Coastal Tourism is doing as a research partner for policymakers, administrators, entrepreneurs and residents of Zeeland.

HZ Research Centre Coastal Tourism

HZ Research Centre Coastal Tourism (HZ KCKT) is the research partner for Zeeland's leisure sector. Based on current and social issues from government, entrepreneurs, social organisations and in line with the destination Zeeland 2030 vision, we develop and transfer knowledge. Using the facts, figures and insights we generate, we identify trends and developments so that informed (policy) choices can be made.

To do this, we work closely with partners in the region, in the Netherlands and abroad. KCKT is part of HZ University of Applied Sciences and collaborates with various study programmes, associate professorships and research centres within the university. With Economische Impuls Zeeland, we work under the name 'Tourism Implementation Alliance' (TUA) on a joint work programme made possible by the Province of Zeeland. We do our research for and with governments and entrepreneurs in Zeeland.

As a partner in CELTH, the Centre of Expertise Leisure, Tourism & Hospitality in which three universities of applied sciences join forces, we are part of all relevant national networks around tourism and recreation, such as the Data & Development Lab and the National Data Alliance. We have also been working with international partners in Interreg projects for many years. Thanks to these collaborations, we are able to bring together the knowledge and skills of many parties and make them usable for the issues in the Zeeland leisure sector.

Reading guide

In Chapter 2, we outline the current situation in Zeeland's leisure sector: what is the position of the sector in Zeeland and what are current themes. In Chapters 3, 4 and 5, we then delve deeper into underlying figures and studies. We do this using the themes of demand, supply and impact. Finally, Chapter 6 discusses our international projects.

To keep the report easy to read, we have chosen to describe our research and projects succinctly. In doing so, we do not always do justice to the effort or the results. In the digital version of this document, you can click through to detailed information on our website (which is in Dutch). This is not possible in the printed version, so we refer you to our website; on the page www.kenniscentrumtoerisme.nl/kennisupdate2024, you will find all the links conveniently grouped together.

2 THE LEISURE SECTOR IN ZEELAND: A SITUATION SKETCH

Delineation of leisure sector

The leisure sector is a broad domain, focusing on the leisure activities of both visitors and residents. They are served by a wide range of both private and public parties. An increasing number of private individuals are also providers in the leisure sector. Think, for example, of renting accommodations. A visitor usually does not come to a region because of a specific company, but because of the interplay between accommodations, catering, entertainment, landscape, shops, transport, et cetera. The leisure sector is therefore not about offering a single product, but a composite product, involving several providers. Finally, there is nature, landscape, urban environment and living environment: the places where many visits and leisure activities take place. Here, the physical layout and social structure determine the proper functioning of the leisure sector - even if these places are not purely for leisure. It shows how strongly the leisure sector is intertwined with all kinds of components of society, economy and living environment (CELTH, 2022).

It has already been mentioned above that the leisure sector is the playing field of both private and public parties. The role of governments is essential, partly because much leisure behaviour takes place in the public domain. But also because the creation of conditions for [social and cultural development and for] leisure is enshrined as a government task in the Constitution (Article 22(3)).

The importance of the leisure sector

The leisure sector is one of the top sectors in Zeeland. Especially economically. Total spending on tourism and leisure activities in Zeeland amounts to € 3.4 billion annually. Direct employment in tourism-recreation companies comprises almost 18,000 jobs. This makes the sector the fifth largest sector in Zeeland in terms of jobs, after healthcare, trade, industry and business services. Indirectly, there are many more jobs thanks to the leisure sector, for example through visitor spending in other sectors and at suppliers. Because of these indirect effects, the intertwining with other economic sectors is unprecedented.

The leisure sector plays a vital role in people's well-being. The most recent RIVM health survey (2024) shows that 8 in 10 Dutch people name one or more forms of leisure or relaxation as a source of happiness: such as holidays and going out. A good range of leisure activities therefore contributes to the (mental) health of Dutch people. A day out or a weekend getaway and making memories with loved ones gives new energy. These moments of relaxation, social interaction and experiences contribute to people's well-being and promote a healthy balance in daily life. The 'Gross National Happiness'!

The leisure sector thus directly affects the residents' quality of life. For example, as tourist-recreational providers offer their services and products (also) to the residents of the region. Also, residents themselves use route networks for cycling, walking and boating, and events make a region attractive. In addition, the sector contributes to maintaining and investing in, for example, retail, cultural and natural heritage, public facilities and infrastructure.

Moreover, the leisure sector plays an important role in inclusivity, both in its role as an employer and as a host (CELTH, 2021). As an employer, partly dictated by the nature of its work, the sector employs people from many different backgrounds, ages and educational levels. As a host, the sector plays a role in bringing people together, thereby contributing to social cohesion.

Current themes in the Zeeland leisure sector

The leisure sector is innovative, always on the move and working hard on the necessary transitions for a future-proof destination. Some current themes in Zeeland are highlighted below. In the following chapters, these analyses are further substantiated from various studies.

BALANCE BETWEEN TOURISM AND SOCIETY

Tourism and recreation make an important contribution to quality of life in Zeeland, amenity levels and economy. The added value of tourism is great and deserves to be better highlighted. Strategic communication is a must. What deserves attention is that currently tourism and recreation are unevenly spread across Zeeland. There is a strong concentration on the coast. And at the same time, there is a need for more vibrancy inland. This calls for different approaches in different regions. The carrying capacity of the environment (nature, landscape and centres) is under pressure due to tourism and recreation in popular parts of Zeeland and in certain periods. This affects residents' support for tourism. Sentiment is under pressure, especially in coastal municipalities. There is still strong support for tourism, but the drawbacks are also increasingly seen.

Moreover, further growth in tourism is expected: the number of people going on one or more holidays is increasing worldwide, leading to a further increase in tourist numbers for many destinations. Growth in tourist numbers is expected for the Netherlands and Zeeland until 2035, although the growth in Zeeland is lower than the national forecast. Besides tourism, recreation is also expected to increase further: the number of residents in the Netherlands is growing and all these residents undertake leisure activities, partly in their own residential environment and partly outside it. For Zeeland, this means that the number of visitors will increase. Here, it is important to realise that the residents of Zeeland themselves are part of this: they are a large proportion in the total of tourist-recreational activities in Zeeland. Further growth of the population in Zeeland also requires sufficient space and facilities for recreation and leisure behaviour, as an important part of broad prosperity in Zeeland. For the quality of life of residents, a broad palette of leisure-related facilities is important, including route infrastructures, recreational landscapes, catering, retail, culture, nature, sports and entertainment. Visitors enjoy these equally. This should be preserved and strengthened.

BALANCE BETWEEN TOURISM AND THE LIVING ENVIRONMENT

Besides having an impact on society, tourism and recreation also have an impact on the living environment. The sector, like other sectors, has an impact on nature and the environment. In 2024 the Ecological Authority found that nitrogen-sensitive nature areas in the Netherlands are not doing well. Nitrogen load and problems in water management are the biggest pressure factors, but recreation is also named as a pressure factor. However, there are hardly any figures on the extent and impact of recreation in relation to the carrying capacity of nature reserves in Zeeland. Despite the lack of data, land management organisations tend to restrict recreational access to nature reserves. In addition, the major task of reducing nitrogen emissions means that emissions from the leisure sector and from all tourist-recreational mobility are also under close scrutiny. The energy consumption in the sector has been showing a declining trend for several years (Central government, 2024). However, there are concerns that the energy transition is now stagnating due to grid congestion on the electricity grid. When it comes to mobility, the extent of car use during holidays and leisure behaviour in Zeeland is now estimated at around 30 million car trips per year. Reducing this number is desirable from an ecological point of view, but also because of reducing inconvenience for residents.

TRANSITIONS AND SCARCITY

Now and in the coming years, the Netherlands and also Zeeland are facing a number of major transition tasks that have a strong (spatial) impact. Issues such as climate adaptation, energy transition, nitrogen reduction, circular economy, digitalisation and the preservation of biodiversity and nature affect the use, organisation and management of our living environment. There is also a scarcity of housing, energy, fresh water and human resources. These challenges present governments and entrepreneurs with unprecedented challenges. But they also offer opportunities, in technical, organisational and financial terms, and have an impact at different geographical levels (international, national, regional and local). These major transition tasks also affect Zeeland's leisure sector. On the one hand, the sector can make an important contribution by innovating, renewing and adapting the tourism product to these transitions. On the other hand, it is important to include recreation and tourism as a fully-fledged function in the multi-year spatial tasks.

THE USE OF SPACE AND CO-OCCURRENCE OPPORTUNITIES

A lot is going to happen in terms of space in Zeeland. Think of changes in the energy landscape, responding to climate change, water safety and expansion of the housing area. Space is scarce and everything demands more space. How do we ensure that the leisure sector, the fifth largest sector in Zeeland and important for the well-being of inhabitants of Zeeland themselves, is given sufficient consideration in these developments? After all, for an attractive living and working climate in Zeeland, sufficient space for (outdoor) recreation is very important. The challenge is to create smart linkage opportunities with recreation and tourism, enhancing the positive experience of residents and visitors. To spread the pressure of tourism on nature and landscape and spare vulnerable areas, more recreational space is needed in and around the built environment and around vulnerable nature areas. On and around current tourist businesses, more space is needed for the green-blue veining, for biodiversity and climate adaptation, among other things.

FUTURE-PROOF BUSINESSES

For the quality of the tourism product, it is important that entrepreneurs have sufficient opportunities for future-oriented and sustainable business. It is important for Zeeland's tourism businesses to be able to respond to the transitions facing Zeeland so that they can continue to develop into future-proof and resilient businesses. After all, their contribution to Zeeland's society and economy is huge. Moreover, they can play an important role in the transitions and contribute to social tasks. This is only possible if they are financially healthy. Companies are stimulated to get started with these transitions, but also experience many obstacles to implementation, for instance from spatial limitations or lack of financial resources. The economic vitality of the sector seems to be under pressure, due to rising costs of personnel, procurement and energy, for example. The sector is therefore concerned about the impact of the planned VAT increase on lodging. The tightness of the labour market is also a major concern for this sector, which focuses on hospitality and service. Opportunities in digitalisation and technology are not yet sufficiently exploited in this respect. KCKT and Impuls are jointly committed to supporting the sector.

INTEGRATED APPROACH IS IMPERATIVE

The above themes are closely linked and require an integrated approach from multiple policy domains and perspectives, with input from all stakeholders. The introduction to this chapter already described how strongly the leisure sector is intertwined with all kinds of components of society, economy and living environment, and this is once again evident in these topical themes. To maintain and strengthen its great social and economic importance, the leisure sector should be fully and integrally included in all relevant policy development. KCKT and Impuls contribute to this, bringing knowledge and expertise to governments, the sector and other social organisations.

3 THE LEISURE SECTOR IN ZEELAND: THE DEMAND SIDE

The demand theme focuses on visitors. Without visitors, there is no leisure sector. They drive the demand for tourist accommodations, and are seeking entertainment and engaging experiences. Zeeland has the following types of visitors:

- Sojourners staying one or more nights in Zeeland for holidays or business trips;
- Regulars who have a second home in Zeeland;
- Day visitors who come to recreate in Zeeland but do not sleep here;
- Residents recreating in Zeeland.

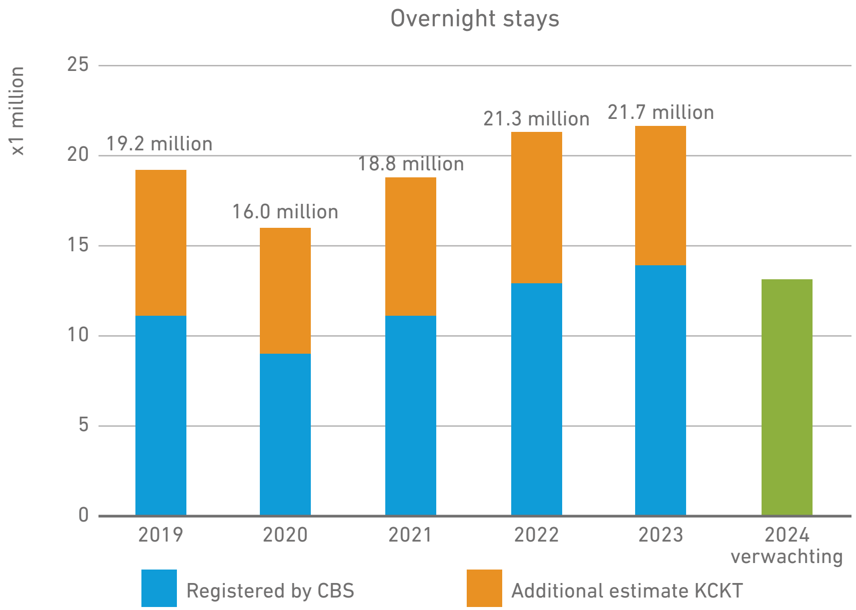
Sojourn visits

Sojourners are visitors who spend at least one overnight stay in the province. In many cases, these are holidaymakers, but guests with a business visit motive are also counted among stay visitors.

Staying visits are measured mainly by the number of overnight stays. A party of four people staying together for three nights in Zeeland thus counts for 12 overnight stays.
Statistics Netherlands (CBS) measures the number of overnight stays by Dutch and foreign guests at registered tourist accommodations. This approach leaves out some of the accommodation tourism, such as small (often private) accommodation providers, permanent guests (people with their own holiday accommodations such as a mobile home or second home), water sports and cruising. To give a more complete picture, we supplement the available CBS data by using municipal figures from tourist and commuter taxes; shown in Figure 1.

We estimate the total number of overnight stays in Zeeland in 2023 at 21.7 million, the highest number calculated so far. CBS figures also show a record in 2023 with 13.9 million registered overnight stays. This is 8% more than in 2022 and a 25% increase compared to 2019 (before the corona pandemic).

Figure 1 – Overnight stays in Zeeland (source: CBS, supplemented with data HZ KCKT)



PRELIMINARY VIEW 2024

Looking at 2024, preliminary CBS figures for the months January to November show a decline in overnight stays. The provisional total until November 2024 is 12.8 million overnight stays, 2% lower than in the same period in 2023. Incidentally, the number of overnight stays in 2024 will still be higher than in 2022 or, say, 2019. 2023 was an exceptionally good year for tourism. If we zoom in further on the figures, we can better interpret why we see a decrease in 2024 compared to 2023.

CBS recorded a sharp drop in the number of overnight stays in the months of April, June and July 2024. All other months saw a small growth. These three months were all designated very wet by KNMI, due to above-average rainfall. The decline in overnight stays in 2024 was particularly visible on Zeeland campsites. This completely reversed the increase in camping nights from 2023. Remarkably, campsites elsewhere along the Dutch coast saw an increase in overnight stays. So weather cannot be the only explanation for the decline. Hotels and cottage sites (with holiday homes or rental chalets) saw an increase in overnight stays in 2024. For hotels, this was a continuation of the growth from 2023; for cottage parks, it meant the resumption of growth after a year of stagnation in 2023.

ORIGIN OF OVERNIGHT TOURISTS

According to CBS figures, 97% of overnight tourists to Zeeland come from the Netherlands, Germany or Belgium. Just under half (46%) come from the Netherlands. North Holland is the only Dutch province where the share of Dutch guests is lower than in Zeeland. On the domestic holiday market, Zeeland therefore has a small market share. Only 7% of all domestic overnight stays take place in Zeeland. In terms of overnight stays by foreign guests, it is the other way round. On the German market, Zeeland is the second province in the Netherlands, after North Holland. On the Belgian market, Zeeland even has the number one position within the Netherlands. For other countries of origin, Zeeland does not play a significant role.

Table 1 - Top three provinces based on overnight stays by country of origin in 2023 (source: CBS)

	Netherlands	Germany	Belgium	Other foreign countries
1.	North Holland (12.2 million)	North Holland (7.1 million)	Zeeland (1.3 million)	North Holland (18.0 million)
2.	Gelderland (12.1 million)	Zeeland (5.9 million)	North Brabant (1.1 million)	South Holland (3.2 million)
3.	North Brabant (9.9 million)	South Holland (4.0 million)	Limburg (1.0 million)	North Brabant (1.3 million)
...				
8.	Zeeland (5.9 million)			Zeeland (0.3 million)

RESIDENCE VISITS BY MUNICIPALITY

Based on our own analyses, we can also provide insight into the number of overnight stays per Zeeland municipality. For municipalities that do not levy a tourist tax or water tourism tax, the number of overnight stays has been estimated on the basis of the size of the available accommodations and overnight stay figures in comparable municipalities. For owners of second homes, annual and seasonal camp site owners and boat owners with a permanent mooring, an average number of overnight stays per year is calculated, based on our 2022 study on permanent guests in Zeeland.

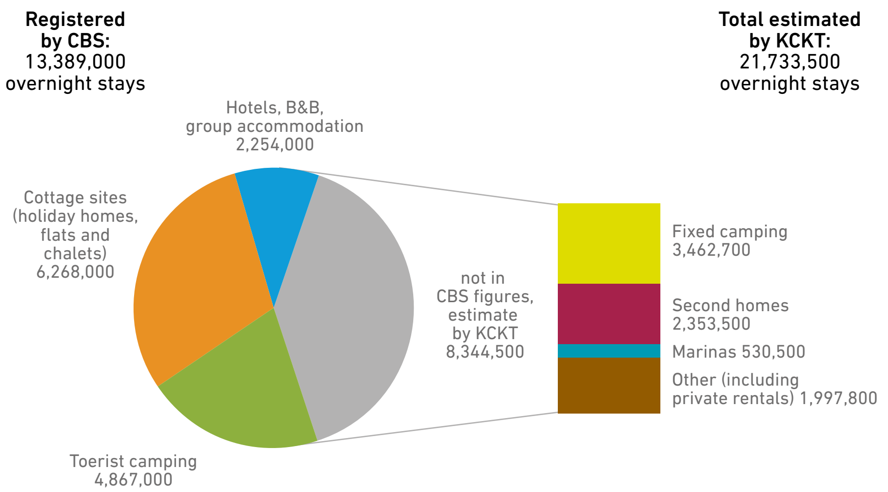
The data for 2023 show a varying picture for the different municipalities. About half of the municipalities record a slight growth, while the other half see a - sometimes considerable - decrease in overnight stays. Looking at a five-year period (2023 compared to 2019), it can be seen that overnight stays have increased in all municipalities. Thereby, overnight stays grew faster in the inland municipalities (+20%) than on the coast (Noord-Beveland, Schouwen-Duiveland, Sluis and Veere; +9%).

Figure 2 - Overnight stays per municipality (source: KCKT)

STAY BY ACCOMMODATION TYPE

As mentioned earlier, CBS only captures overnight stays in registered tourist accommodations. In addition, KCKT estimates overnight stays by permanent guests on campsites and in second homes, in marinas and in small (mostly privately rented) accommodations.

Figure 3 - Overnight stays by accommodation type (source: CBS and KCKT)



In Zeeland, the majority of overnight stays in 2023 were spent on cottage sites, in holiday homes, flats and rental chalets: 6.3 million. Tourist camping is number two with 4.9 million overnight stays. The third most chosen accommodation type is permanent camping on campsites, in a private mobile home on an annual pitch or in a camping vehicle on a seasonal pitch.

Demand for annual and seasonal pitches

The market for annual and seasonal pitches is in full swing across the Netherlands, especially as several campsites are undergoing redevelopment, and in the process these pitches often expire. For entrepreneurs, the profitability of tourist camping pitches or rental units, such as chalets or cottages, is greater. In Zeeland, too, a number of campsites part with (some of) their regular guests every year.
Many have the impression that the target market for annual and seasonal pitches is ageing sharply and thus slowly shrinking. We therefore conducted further research into this market in 2024. Through interviews with over fifty campsites in Zeeland, we obtained a picture of the current annual and seasonal pitch holders as well as the market potential. This picture was obtained by asking about the number of applications and any waiting lists. It showed that there is still a lot of interest in seasonal and annual pitches. Campsites receive many applications from guests of all ages and nationalities. The age group of 50 or older is the largest group interested in a seasonal or annual pitch. Looking at country of origin, applications come mainly from guests from Germany. Based on this **survey**, it appears that this market is still alive and kicking.

FORECAST OVERNIGHT STAYS IN 2035

KCKT, in cooperation with CELTH and the Netherlands Board of Tourism & Conventions, has made a forecast of the expected development of overnight stays until 2035 . The starting point was the guests registered by CBS in tourist accommodations.

In 2035, the Netherlands is expected to have 61 million registered overnight tourists. This is 12 million more guests than in 2023 (+24%), with an average of one million guests added each year. The number of domestic overnight tourists will grow by 13% to 33 million. This growth is stronger than previously expected in Perspective 2030. The number of international guests grows to 28 million in 2035 (+39%). This is lower than the forecast in Perspective 2030. For most countries of origin, growth is slower than in the period before the corona pandemic.

This forecast has been translated at a provincial level. For Zeeland, overnight stays will grow less rapidly than nationally. Zeeland is expected to lag somewhat behind in the domestic market: +11% instead of +13%. The number of international guests in Zeeland is expected to increase by 24%, slower than the national forecast of +39%. This is mainly because the growth of the foreign market nationwide is driven by guests from central and southern Europe and Asia. These are countries of origin that are still finding their way to Zeeland to a limited extent. An important country of origin for Zeeland is and will remain Germany, which, however, will show much more moderate growth. Belgium, also important for Zeeland, does show somewhat higher growth and Zeeland is among the favourite destinations. All in all, Zeeland is expected to reach over 3.5 million registered guests in 2035, 18% more than in 2023.

While this forecast provides valuable insights for policy development, it is not an exact prediction of future visitor numbers. Long-term forecasts simply have limitations. For instance, they cannot take into account short-term factors such as weather conditions or changes in prices. The forecast is therefore mainly an indication of the generally expected development of tourism to the Netherlands.

WHO ARE THE SOJOURNERS OF THE FUTURE?

Besides understanding the expected number of overnight tourists, KCKT, in collaboration with NHL Stenden's European Tourism Futures Institute, also conducted research into the wishes and preferences of these future visitors. This research consisted first of all of an analysis of the development of tourism in Zeeland over the past two centuries. This showed that the accessibility of Zeeland as a destination and the purchasing power and leisure time of guests were determining factors in the development of tourism to Zeeland in the first 1.5 centuries. In the last decades, innovation and supply renewal and expansion were the main focus, driven by changing guest needs.

Looking at trends and developments until 2040, it can be seen that the population in the countries of origin important for Zeeland is growing and changing: an ageing and increasingly diverse society, including more people living alone. A shift in generations is taking place: the baby boom generation will give way to generations Y, Z and Alpha by 2040. These generations have different holiday preferences. They have grown up with all the technological and digital possibilities and expect this to be maximised in their holiday experience. Living in an increasingly urbanised world means that people are looking for nature experiences and staying in green spaces during their holidays.

The report 'Guest of the future' retraces all the steps of the study and paints a picture of 2040: Who is the guest, what are they looking for, and how do they spend their time? This is complemented by a brief description of the main challenges for Zeeland as a holiday destination.

Lifestyles as a tool for entrepreneurs

No two people have the same wishes. Nevertheless, some main groups can also be identified in guests' wishes. Based on research, the Holiday and Leisure lifestyle finder distinguishes seven different lifestyles, which describe what people want to do in their leisure time or on holiday and how these wishes differ from each other. This helps to understand what people find important and how they make choices about their leisure time and holidays. Some people seek peace and relaxation, while others like hustle and bustle and adventure. People often have a preference for a particular lifestyle, but can also have characteristics of several lifestyles. KCKT has produced a **practical guide**, with information on the seven different lifestyles in the Netherlands and all kinds of concrete and examples concerning Zeeland. This enables entrepreneurs and policymakers to respond even better to the wishes of the guests they want to attract.

Lifestyle styles as a tool for spreading visits to natural areas

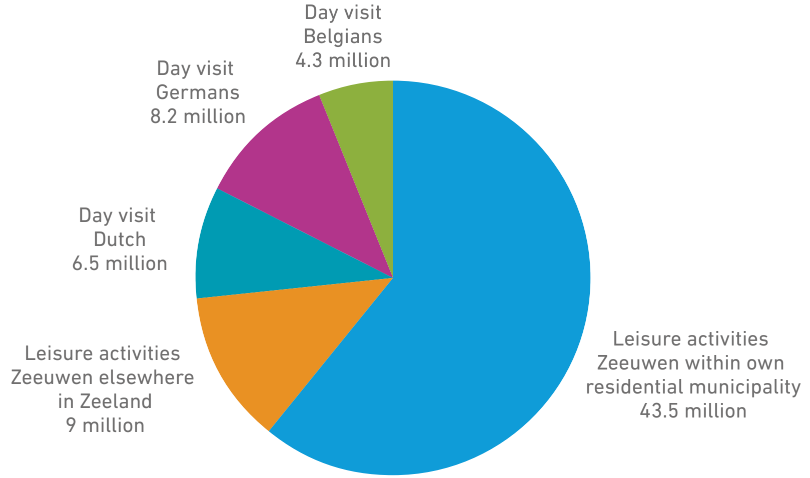
The land management organisations in Zeeland want to spread visitors better across nature reserves in Zeeland. But what are the visitors' needs and how well do the areas meet them? For Zeeland, KCKT investigated how the lifestyle finder could support site management organisations. This resulted in a practical step-by-step plan that they can use independently. The step-by-step plan was tested in the Het Verdronken Land van Saeftinghe and Oranjezon nature reserves, together with the relevant site managers. The step-by-step plan and the research results are available in **this report**.

Day visits in Zeeland

Besides residential tourists, we as a province also receive many day visitors every year. Here, a distinction can be made between visitors from outside the province visiting Zeeland for a day and the inhabitants of Zeeland themselves who undertake all kinds of leisure activities in their own province. Collecting information on day visitors is a challenge. This is because these visitors spend the night at home and are therefore not registered anywhere. Therefore, we used two national surveys on day visits and leisure activities: the Nederlands VrijeTijdsOnderzoek (NVTO) 2022/23[1] of NBTC and the Research Inkomend Dagbezoek (OID) 2021/2022 of NBTC.

Every year, inhabitants from Zeeland undertake some 43.5 million leisure activities in their own residential municipality: an average of two activities of at least 1 hour per week. In addition, this same group undertake another 9 million leisure activities elsewhere in Zeeland. Dutch people from other provinces visit Zeeland some 6.5 million times for a day visit. About 8.2 million day visits are made to Zeeland from Germany and about 4.3 million from Belgium.

Figure 4 - Day visit and leisure behaviour in Zeeland (source: NVTO and OID)

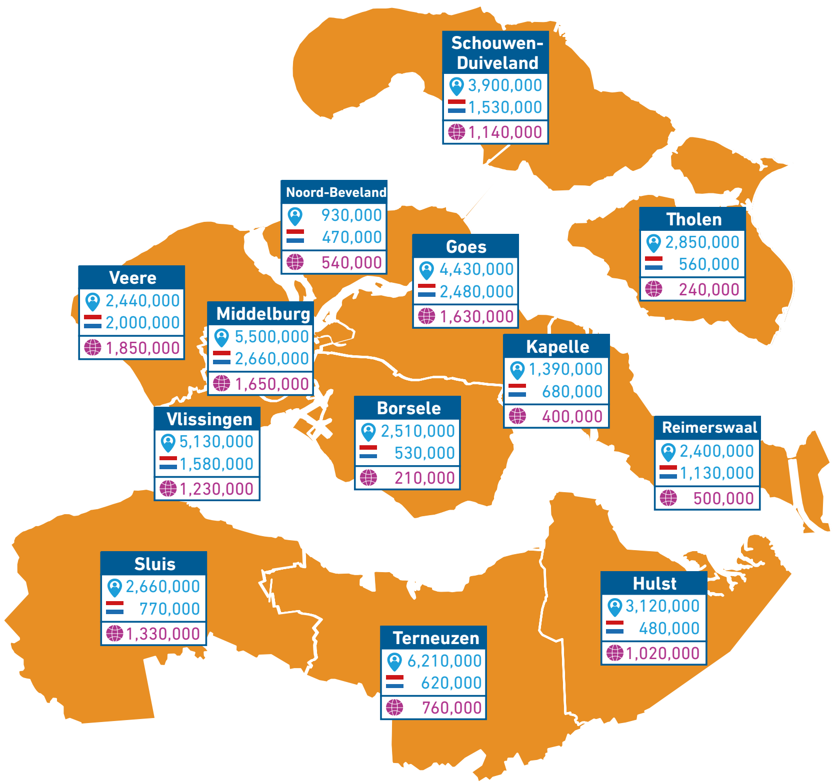


1 NVTO figures were corrected last year, so the figures shown differ from earlier figures in the Research Update YEAR 2023.

REGIONAL DISTRIBUTION OF DAY VISITS

Since residents undertake most of their leisure activities within their own municipality, many leisure activities also take place in municipalities with high population numbers. This is visible in the cities in Zeeland. For leisure activities by other inhabitants from Zeeland (from other municipalities) and day visitors from home and abroad, the top three are formed by the municipalities of Middelburg, Goes and Veere.

Figure 5 - Day visits and leisure behaviour in the Zeeland municipalities (source: KCKT estimate)



Leisure activities of local residents within their own municipality (estimate based on the NVTO 2023)

Leisure activities of other Zeeland residents & Dutch people (based on NVTO 2023)

Day visits from Belgium and Germany (estimate based on OID 2022 and NVTO 2023)

Zeeland Leisure Survey

Although visitors are often the focus of surveys, many residents in fact also use these local leisure facilities. Inhabitants of Zeeland undertake some 54 million leisure activities in their own province. It is therefore of great importance to know more about the wishes and expectations of our residents. Supplementing the Dutch Leisure Research, KCKT has therefore conducted research into the leisure behaviour of inhabitants of Zeeland.

The research **Zeeuws Vrijetijdsonderzoek** provides insight into the leisure activities inhabitants of Zeeland undertake outdoors, where they do so, how often and in what type of environment. In addition, we asked residents how they rate the leisure offer in their region, whether they miss certain facilities and whether they ever look up information about the leisure offer. The Zeeuws Vrijetijdsonderzoek report contains results for Zeeland as a whole and a breakdown by region for the Bevelanden, Schouwen-Duiveland & Tholen[2], Walcheren en Zeeuws-Vlaanderen.

Inhabitants of Zeeland are best satisfied with the leisure facilities in their own province: they rate them with a 7.4. Inhabitants of Walcheren are the most satisfied (7.6) and inhabitants of Zeeuws-Vlaanderen somewhat less average (7.1). Residents are most satisfied with the facilities for relaxing on the beach and in the dunes and least satisfied with the supply of day attractions. Almost half of the inhabitants of Zeeland miss facilities for specific target groups; a fifth mentioned facilities specifically for young people. In the report, survey participants describe points for improvement and wishes.

2 The municipalities of Schouwen-Duiveland and Tholen were merged in the analysis because the sample per municipality was not sufficient.

Insight into crowds using GPS data

Much has been written on the previous pages about the number of overnight stays and day visits in Zeeland. Those figures do not yet give an insight into crowds. Crowds - the number of people at a given location - vary over time and by location. Please take note that, crowds are not only caused by overnight tourists or day visitors, residents are also part of it.

Objective and complete measurements of crowds are a huge challenge for most tourist-recreational destinations, at home and abroad. Indeed, such data is currently hardly (publicly) available at local level. To still provide some insight into crowds, KCKT analyses pressure estimates from data supplier Resono. These are estimates, based on GPS data from app users, for 26 tourist locations in Zeeland. This data can be used to offer insights into patterns in crowds throughout the year, but also, for example, the extent of repeat visits. The **analyses of crowds** over the period 2022-2023 and 2023-2024 have now been published. In the coming period, we will continue to use these data for Zeeland's authorities, nature organisations and the Interreg Flanders-Netherlands project (Be)Leefbare Schelde, among others.

4 THE LEISURE SECTOR IN ZEELAND: THE SUPPLY

On the supply side, KCKT conducts research into the size and development of the accommodation and leisure supply in Zeeland, as basic information for policy and management in the leisure sector. KCKT also conducts research on transitions in society - such as energy and climate - and how providers in the leisure sector can deal with them.

Accommodations in Zeeland

For several years, KCKT has managed a database of tourist accommodations in the province of Zeeland. This database provides a complete picture of all tourist accommodations: from hotels to campsites, from second homes to bungalow parks. Periodic updating of these data will allow continuous monitoring of the development of the offer of tourist accommodations in Zeeland. The data can be consulted online via a dashboard. This dashboard shows the number of units and beds per accommodation type, per municipality or per place of residence. In this way, policymakers, entrepreneurs and researchers can consult up-to-date data on accommodation supply in Zeeland themselves.

Currently, the province of Zeeland has about 84,000 tourist accommodation units. Almost a quarter are tourist camping sites (about 20,000). Over a fifth are holiday homes (ca. 18,000), which are rented out or second homes for own use. Another fifth are annual pitches with mobile homes on campsites (approx. 17,500). The number of annual pitches is under pressure due to the redevelopment of several campsites. Our time series is still too short to capture this properly, but the trend is visible.

Apart from the type of units, the nature of supply can also be considered. Here we distinguish between tourism businesses, agricultural businesses with accommodation rental as a secondary function and private individuals. 70% of the accommodation units in Zeeland are offered by tourism businesses. Almost 10% of the supply is on agricultural businesses. That leaves 20% of the supply, namely supply owned by private individuals. This partly concerns ownership of accommodations for own use (second homes) and partly rental of houses, flats and rooms (B&B). Unfortunately, we cannot properly distinguish between owner-occupation and rental. However, we do know that just over half of these accommodations are concentrated in cottage parks without central rentals. The rest are in built-up areas or are single units in the countryside.

The distribution of the number of units across the province of Zeeland is shown in Figure 6. This is a heatmap, where the darker the blue, the higher the concentration of units in that area. Entirely in line with expectations, accommodation supply is concentrated on the North Sea coast of Zeeland, with the coastal area at the Kop van Schouwen having the highest density in the number of units.

The accommodation database is regularly updated and the most up-to-date version can be accessed on our **website**. In 2025, this database will be thoroughly updated again in order to continue displaying the most up-to-date data in the future. The Zeeland database will also be linked to the recently established national database of accommodation establishments.

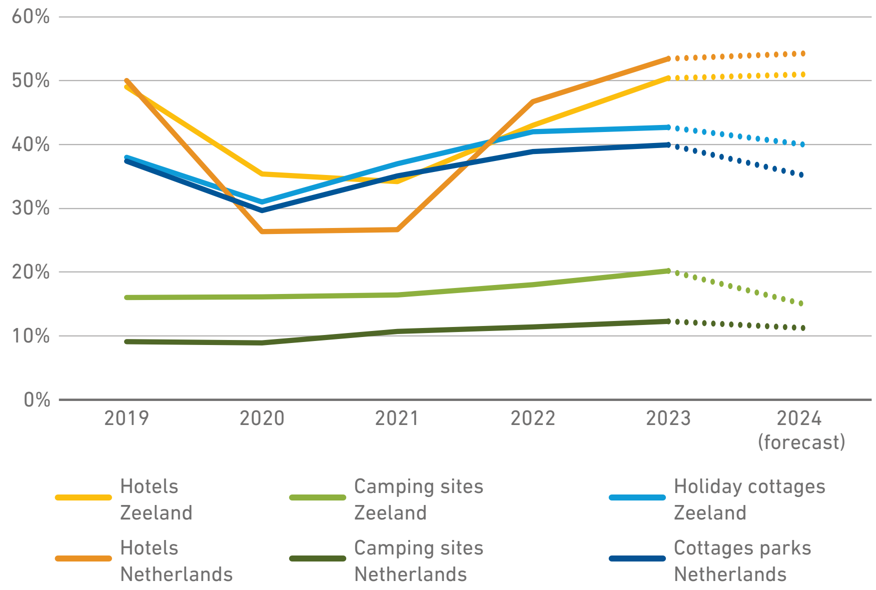
Figure 6: Distribution of accommodation in Zeeland (source: KCKT)

ACCOMMODATIONS AVAILABLE

Insight into the size and distribution of supply is the basis in terms of knowledge, but insight into the vitality of supply is at least as relevant. Vitality often refers to economic health and future-proofing. Unfortunately, so far there are few data available to provide a good and structural picture of this. A relevant indicator is the occupancy rate. Accommodation providers calculate occupancy per unit to be rented out - per room, per camping pitch or per cottage. KCKT, however, has no insight into these data and can therefore only paint a rough picture with a bedroom occupancy rate. This can be calculated by dividing the number of overnight stays by the available capacity (number of sleeping places). This bedroom occupancy rate always gives a somewhat distorted and understated picture. After all, when 2 people book a 4-bed cottage, the bed occupancy rate is only 50%, but the cottage is fully occupied: the other beds can no longer be rented out. Especially on camping and cottage sites, the bed occupancy rate is therefore only an indication and the occupancy rate is higher in practice. Despite these caveats, the bedroom occupancy rate does give a picture of the situation, especially if it is monitored for several years in a row and/or compared with national figures.

Figure 7 shows the bedroom occupancy rates for the years 2019 to 2023. The figure also includes a forecast for 2024, based on CBS' preliminary figures up to November 2024. It shows that hotels in Zeeland tend to have lower bedroom occupancy rates than the average in the Netherlands. The exception was the 'corona years', when Zeeland hotels were less affected by the drop in business guests and international tourists. In 2024, occupancy is expected to rise somewhat further, in Zeeland and in the Netherlands as a whole. Zeeland cottage sites - with holiday homes and rental chalets - tend to have slightly higher bed occupancy than the average in the Netherlands. By 2024, occupancy appears to be declining both in Zeeland and nationally, with the decline in Zeeland appearing to be less pronounced than elsewhere in the country. For years, camping sites in Zeeland have had higher pitch occupancy than their counterparts elsewhere in the Netherlands. Although the pitch occupancy rate in Zeeland is expected to fall considerably by 2024, it will still remain above the national average

Figure 7: Sleeping accommodation occupancy rate (source: CBS, edited by KCKT)



The above figures refer to the recent period and provide only an indicative picture. In the future, we would like to identify developments in the market earlier so that we can inform authorities and entrepreneurs about them sooner. Therefore, in 2025, we will focus on creating up-to-date insight into occupancy through links with reservation software of accommodation companies.

MARKET DEVELOPMENTS

Developments in accommodation supply were strongly stimulated from the property market over the past decade. Partly due to the low savings rates, the purchase of recreational real estate was an attractive investment. Consequently, when developing hotels and holiday parks, there was also a strong focus on financial returns and not only on hospitality and experience. Meanwhile, experts say there has been a turnaround. For investors in holiday homes, 2023 was a difficult year due to increased transfer tax, higher mortgage interest rates and a change in box-3 taxation, which means tax has to be paid on the value of the home.

As a result, the number of recreational houses sold in the Netherlands fell sharply in 2023: one-third less than in 2022 and the lowest number in seven years (NVM, 2024). In Zeeland, although the number of transactions remained level in 2023, the supply of recreational houses became sharply larger than in previous years. However, prices were still among the highest in the Netherlands.

In addition to the leisure property market, there is also the whole recreation business segment. The generation that made the sector great is now nearing retirement. Due to the national lack of space for relocation and expansion, the value of recreational businesses is increasing. Combined with the high investment pressure, due to keeping the offer up-to-date, digitalisation, energy transition, climate adaptation and so on, business acquisition is very costly and complex. Business succession in the family is not always possible. One reason for this is that more and more companies are being taken over by international chains. Their business model more often focuses on a combination of selling and renting recreational property. For guests, these chains mean a certain form of security: holidaying in different places where you know in advance what to expect, because the concept and service level are standardised. This chain formation had been going on for decades with hotels, was followed by bungalow parks and is now also visible with campsites. These chains usually have less of a connection with the region, which means that the social role - for instance, in relation to regional tasks - is often fulfilled to a lesser extent.

Motorhomes are still immensely popular. In 2024, the 200,000st camper van was registered on a Dutch number plate. In a period of eight years, the number of motorhomes in the Netherlands doubled. And the caravan has also been rediscovered. The total number of caravans in the Netherlands gradually declined over the past 20 years, partly in favour of the growing number of motorhomes. Last year, however, that decline stopped and the caravan population increased again. On 1 January 2025, 422,903 caravans were registered, several hundred more than a year earlier (BOVAG, 2025).

Despite the increased popularity of camping, pitches are increasingly having to make way for rental accommodations in the form of (tiny) cottages, glamping tents, gypsy caravans and other intermediate forms. This allows a new target group to be introduced to outdoor living during holidays.

Fuelled by an increasingly busy daily life and a greater desire for experience and adventure from Millennials, 'nature' lures even more than usual. As a result, camping in small-scale places with few amenities is increasing. Nature camping sites, for instance, have seen an increase in visitors for several years. Stichting De Groene Koepel reported that in 2024 the record of 80,000 Nature Camping Cards sold was achieved, the card that allows people to camp at all Nature Camping Sites in the Netherlands and surrounding countries. Camping at private homes and micro-campsites is also on the rise. A particularisation of this is the trend of theme campsites: small campsites that very consciously choose a particular type of camper and focus on that (Kampeermeneer, 2025). For instance, campsites offering retreats, mindfulness and meditation have been on the rise for the past two years.

THE ROLE OF ONLINE RENTAL PLATFORMS

Rental platforms play an important role in the accommodation market. Almost half of Dutch people aged 18 and over booked a holiday via a holiday platform in the past three years (Multiscope, 2024). That's 7.2 million Dutch people. 'Supply', 'convenience' and 'price' are the reasons why people choose a particular holiday platform.

On the supply side, rental platforms are used by both regular tourism businesses (hotels, holiday parks, campsites) and private landlords. For professional providers, rental platforms are additional sales channels, offering millions of potential customers in exchange for commission. For private landlords, these platforms mean easy access to a huge customer potential, free-riding on advanced technology and marketing, and significant sales results.

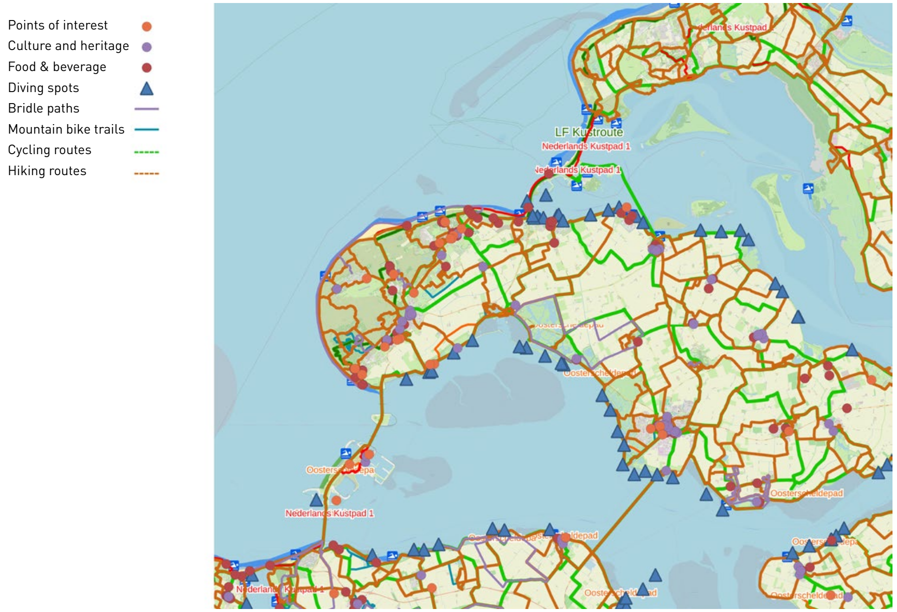
An analysis of the supply in Zeeland on Airbnb and Vrbo showed that 59% of the accommodations offered in 2022 was regular supply from tourism companies. The occupancy rate of accommodations on offer in Zeeland is high compared to other destinations. The occupancy of private accommodations and accommodations from regular tourism providers is similarly high.

European statistics office Eurostat unlocks data from Airbnb, Booking, Expedia Group and TripAdvisor, offering insights into the number of nights spent in private rentals through these platforms. The National Data Alliance made an analysis of this for the Netherlands. According to this analysis, Zeeland counted 1.3 million overnight stays in private accommodations in 2023. This puts Zeeland in third place, after North and South Holland. The number of overnight stays in private accommodations almost doubled in Zeeland compared to 2018. Middelburg has a surprising number 5 position in the Netherlands, after Amsterdam, The Hague, Rotterdam and Haarlem and ahead of cities such as Utrecht, Maastricht and Eindhoven.

Understanding the leisure offer

As described in Chapter 2, visitors do not come to Zeeland because of a single business, but for the interplay of environment, accommodations and supply of leisure activities. In recent years, KCKT has therefore worked on mapping the leisure offer. The aim is to gain a better understanding of the nature, distribution and extent of Zeeland's tourist-relevant leisure offerings. This includes recreational routes (cycling, walking, MTB, horse riding), day attractions, museums, nature reserves, beaches, catering, retail, et cetera. Combined with data on accommodation supply and data on the appreciation and wishes of residents and visitors, the Zeeland Leisure Supply Database provides insight into 'white spots' in the Zeeland leisure supply. In this way, these data help identify opportunities. After a limited update of the data in 2024, the Database Vrijetijdsaanbod Zeeland will be fully updated in 2025 compared to the first inventory in 2022. Upon request, KCKT can produce analyses and maps of the leisure offer.

Figure 8: Sample map showing various forms of leisure offerings (source: KCKT)



Climate resilience sector

One of the big challenges for all sectors is climate change. Zeeland's leisure sector must also change as a result. In 2024, KCKT conducted a baseline measurement to assess the climate resilience of the sector. The aim was, on the one hand, to visualise how much knowledge the sector has about climate change and, on the other, to find out how many climate-proof measures the sector has already taken.

More than half of the respondents are aware of the risks of climate change and possible climate measures. Most are concerned about climate effects such as flooding, drought and extreme weather. Heat worries them less, despite people saying they already experience the effects of heat several times a year.

The survey shows that lack of knowledge limits the number of climate-proofing measures taken or planned. Respondents mainly opt for low-threshold measures, which pay off in the short term. Mitigation measures, aimed at saving energy or reducing waste, for example, are the most popular. Adaptive measures, aimed at limiting nuisance from climate change, are often more expensive, time-consuming and often do not yield immediate results. Budget and (in-house) knowledge and expertise are often decisive for successful implementation, while limited (in-house) budget, technical complexity and laws and regulations are most often an obstacle.

Over two-thirds of respondents have plans to implement measures in the next five years. Half of these say they would like support in doing so, such as obtaining knowledge and skills or access to financial resources. The results of the survey are an important building block for further stimulating climate resilience in Zeeland's leisure sector by governments and Impuls Zeeland.

Sustainable water recreation: the role of boat owners

As in other sectors, sustainability is also important in water recreation. To what extent are boat owners in Zeeland currently working on this sustainability? What is going well and where are they struggling? How would they like to be helped in this transition? KCKT answered these questions last year. During the survey, the concept of sustainability was broken down into five themes: electrification (fossil-free boating), minimising underwater noise, ecologically responsible boating, fuel efficiency and reducing water pollution.

Many respondents are positive about sustainability and have already taken measures, especially when they provide cost savings or comfort in addition to sustainability. Think solar panels or holding tanks. However, investments in an electric motor are limited by technological challenges, such as limited range and insufficient charging infrastructure in Zeeland. In addition, high costs are a major obstacle. Curious about all the insights or need more detail? Then read the full **report**.

5 THE LEISURE SECTOR IN ZEELAND: IMPACT ON LIVING ENVIRONMENT AND SOCIETY

When it comes to impact on living environment and society, KCKT conducts research into the consequences of the leisure sector. These can be positive or negative With the various studies, KCKT hopes to contribute to strengthening positive impact and reducing negative impact, ultimately achieving the ambition of Zeeland 'tourism in balance with the environment'.

Can balance be measured?

Since the publication of 'Perspective 2030. Destination Netherlands' and the advice 'Valuable Tourism' by the Council for the Environment and Infrastructure, there has been a lot of focus on the search for the balance between the joys and burdens of tourism. Many regions are therefore looking for ways to measure this balance. KCKT is one of the pioneers on this topic. In 2024, we conducted extensive research on the best approach. This resulted in a preliminary list of 20 indicators that provide insight into the scale of tourism and its impact on the economy, on residents and on nature & the environment. While this does not yet create a comprehensive picture of balance, it provides a good starting point for a conversation about the state of the destination. Starting in 2025, we will use these - and perhaps new - indicators for a dashboard on tourism in balance in Zeeland.

Economic value of the leisure sector

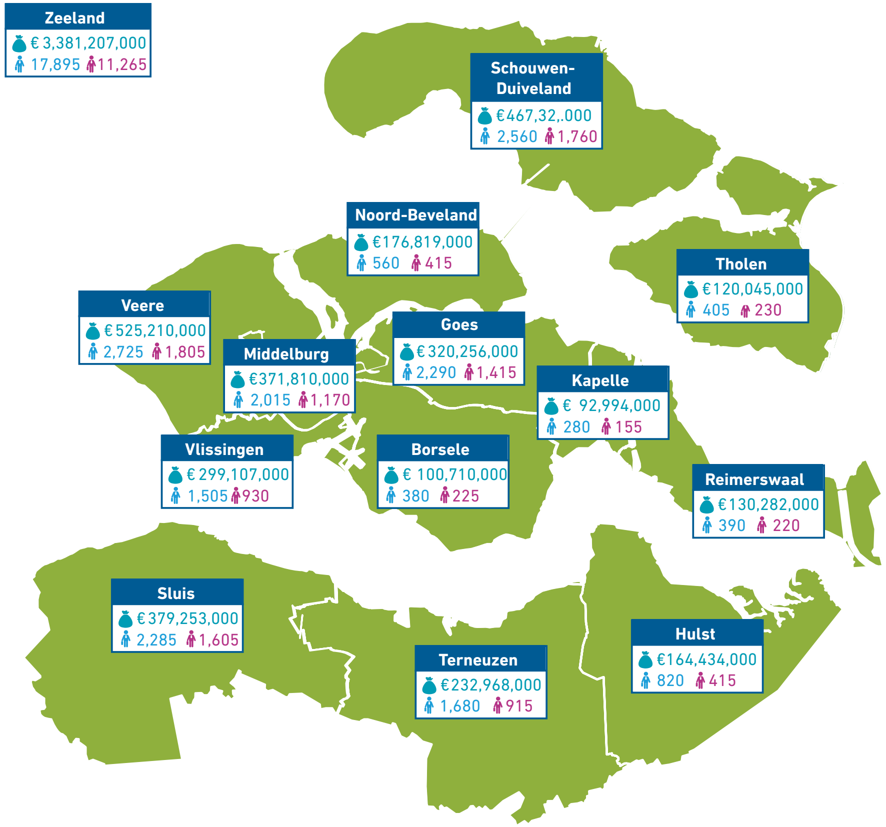
As described in Chapter 2, the leisure sector - with €3.4 billion in annual spending and direct employment in tourism-recreation businesses of almost 18,000 jobs - was one of the top sectors for the Zeeland economy in 2023. A report on the economic value of the sector explains this in detail. Here we focus on both spending and employment.

Spending can be broadly divided into spending on accommodations, catering, shopping, excursions and other spending. The largest share of spending was made in the hospitality industry (approximately 38%) and shops (approximately 31%). About 14% of the spending was done directly at accommodation facilities, about 11% on outings and about 6% of the spending is in the other category. Another interesting question is where in Zeeland the money was spent. Most of the spending took place in the coastal municipalities (Veere, Schouwen-Duiveland, Sluis and Noord-Beveland). Almost 46% of spending was done in these municipalities. In addition, relatively large amounts were spent in the urban municipalities (Middelburg, Goes, Vlissingen, Terneuzen and Hulst): over 41% of spending. This relatively often involved spending during leisure activities by inhabitants of Zeeland.

A similar picture emerges when we zoom in on the distribution of employment at tourism-recreational businesses across Zeeland: tourism-recreational employment is highest in the coastal and urban municipalities. With over 2,700 jobs, the municipality of Veere has the largest tourist-recreational employment.

Tourism-recreation employment has developed strongly in recent years (2019-2023). The corona pandemic caused a temporary drop in employment, but by 2023 the number of jobs was already more than 4% higher than in 2019. The total number of jobs in the Zeeland tourism-recreation sector was around 17,900 in 2023. This is about 11% of all jobs in Zeeland. However, tourism and recreation also create many jobs outside its own sector, e.g. in retail and in supplying companies such as construction, cleaning and business services.

Figure 9 - Economic value tourism and leisure in the Zeeland municipalities
(source: KCKT estimate)



Expenditures (source: calculation by HZ Research Centrum Coastal Tourism)

Employment in jobs (source: Arbeidsmarktmonitor Gastvrijheidssector NBTC)

Employment in FTE (source: Arbeidsmarktmonitor Gastvrijheidssector NBTC)

Residents and their perception of tourism

As part of working towards a destination in balance, it is important to know how residents view tourism. On behalf of Zeeland's governments, HZ Research Centre Coastal Tourism has been doing periodic research into this since 2019. In collaboration with municipalities, a random selection of residents is invited to complete an online questionnaire. Using a weighting on characteristics such as age and place of residence, a representative picture of the survey results emerges at municipal level. Since experience shows that there are large differences between residential centres, we also draw an indicative picture at residential centre level at the request of a municipality.

Some key insights from surveys in recent years:

- The percentage of residents supporting tourism is between 50% and 70%;
- One-fifth to one-third of residents are neutral about tourism;
- Residents see economic value as the biggest benefit of tourism;
- Traffic and parking nuisances are by far the biggest annoyance;
- The extent to which residents experience certain advantages and disadvantages and support tourism varies significantly between the coast and inland, as well as between centres.

Based on surveys over the years, the first tentative conclusion is that residents see more and more drawbacks and, on the contrary, fewer benefits from tourism. In addition, especially on the coast, more and more residents are worried about the increasing crowds. In some places, this leads to a decline in support for tourism. The next edition of the survey, which will take place in 2026, will show whether there is a trend. It is valuable that all municipalities take part in it, so that we have a complete picture at the Zeeland level and can also make comparisons between municipalities.

WORKING TOWARDS BENEFITS FOR RESIDENTS

Our research results help governments to engage in targeted discussions and take action with residents, entrepreneurs and other relevant parties. This involves not only minimising the drawbacks of tourism as much as possible, but also increasing the benefits. Under the heading 'resident benefits' a national group of destination management organisations (DMOs) and knowledge institutions has been working on this topic for some time. HZ Research Centre Coastal Tourism is part of this, to share knowledge with other regions and in turn use their knowledge and experiences for Zeeland. A CELTH project has also emerged from this collaboration, exploring how to visualise the benefits residents experience from tourism. The final result of this - a selection tool - will be published in the spring of 2025.

Tourist mobility

Chapter 3 describes in detail the number of overnight stays, day visits and leisure activities undertaken in Zeeland. Here, the car is a frequently used means of transport. There are several reasons for wanting to reduce car use; from an ecological perspective (reducing emissions), to improve traffic safety, to reduce nuisance caused by residents and to enhance the experience during the visit. Until now, there was no clear picture of exactly how much car use is related to tourism and leisure behaviour. KCKT therefore used existing data sources to make a well-founded estimate of the number of car trips related to tourism and leisure behaviour in Zeeland.

Figure 10 - Car trips in Zeeland related to tourism and leisure behaviour (source: KCKT estimate)

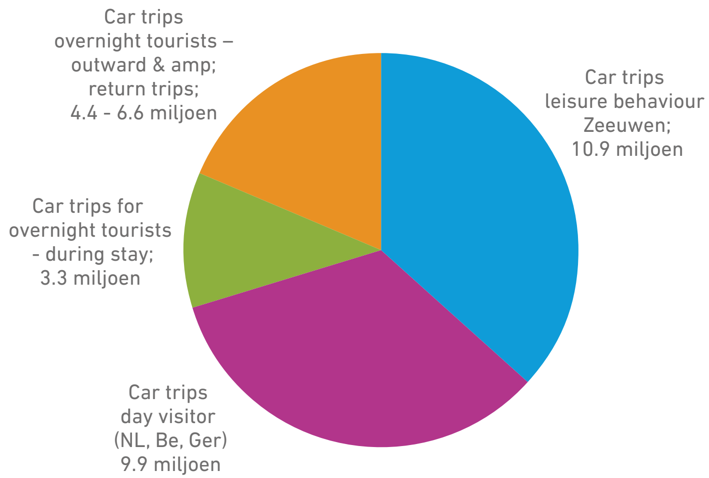


Figure 10 shows that residents of Zeeland themselves make the most car trips for leisure activities: nearly 11 million. Day visitors from home and abroad make nearly 10 million car trips to and from Zeeland every year. Overnight tourists make about 3.3 million car trips for travelling to and from Zeeland. During their stay, they are estimated to make between 4.4 and 6.6 million car trips. It is expected that car use for travelling to and from Zeeland is likely to be difficult to influence. Therefore, the ambition is to reduce car use during the stay.

In the report '**Tourist Mobility. Insight into demand, supply and best practices**', car use during the stay was further analysed for 10 residential areas with the largest number of residential tourists in Zeeland. The number of car trips per month was estimated and a picture was drawn of common destinations. Subsequently, alternative transport options that are already available and good examples of alternative transport in other regions were identified.

6 INTERNATIONAL PROJECTS

For many years, KCKT has worked with partners across the border: universities, tourism organisations and governments. Thanks to these collaborations, we are able to bring together the knowledge and expertise of many parties and make it useful for the issues in the leisure sector in Zeeland. KCKT is currently working on two international projects: 3ST and (Be)Leefbare Schelde.

Speeding up sustainability with 3ST

The tourism-recreation sector faces significant sustainability challenges. It is crucial to carefully manage natural resources such as fresh water while focusing on sustainable energy generation and reuse of materials. While technological innovations increasingly offer solutions, actual implementation in practice often lags behind.

Co-funded by the European Union, the 14 partners of the Interreg North Sea Region project '**3ST: Speeding up Sustainability Skills in Tourism**' aim to change this. This project focuses on developing skills and cooperation models that support tourism entrepreneurs and policymakers to engage with sustainability in practice. The emphasis is on collaboration: not individual experimentation, but working together with other stakeholders to find solutions with greater impact. Within the project, nine regions in six countries act as testing grounds. Zeeland is one of those regions. In collaboration with four Zeeland municipalities, Impuls Zeeland is testing solutions in waste management, water saving and energy use.

KCKT and HZ Kenniscentrum Ondernemen & Innoveren are supporting all living labs with research into effective forms of cooperation and ways to strengthen the skills of stakeholders involved. These insights should help accelerate the sustainability transition in tourism. The project started in late 2023 and is on-going until 2027.

3ST | Interreg North Sea | Co-funded by the European Union

Multiple studies for a (Be)Leefbare Schelde

The Interreg Flanders-Netherlands project **(Be)Leefbare Schelde** has as its overarching objective the tourist development of the cross-border region as an accelerator for sustainable, social and cultural development of the UNESCO Global Geopark Schelde Delta. KCKT is working with 21 partners, including provinces and municipalities in Flanders and the Netherlands, on this project. Within the project, the aim is to increase the recognition of the region as a valuable tourist destination. This includes strengthening the tourism offer and connecting various places in the region. Thus, the story of the present, the past and the future of the area will be a good environment to live in and experience.

KCKT, together with research partners, develops knowledge promoting distribution and connection in the region. This includes research into the most appropriate methodology for capturing visitor flows and involving local stakeholders in sustainable tourism development. Another challenge focuses on monitoring visitor segments and understanding visitors' reasons for visiting the region. In the pursuit of sustainability, how to measure visitor engagement with climate change and/or climate adaptation around the pearls is also being explored.

Interreg Vlaanderen-Nederland | Gefinancierd door de Europese Unie

(Be)Leefbare Schelde

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