



Indicators for the Scheldt estuary

Socio-economic importance of residential tourism



The number of nights spent by Dutch tourists in the tourist regions of Zeeuws Vlaanderen and Walcheren dropped to 17% since 2005. In Bevelanden & Tholen overnight stays are on the rise. However, no data are available specifically for the Westerschelde. The tourist region 'Scheldeland' in Flanders had a 50% growth in the number of holidays and 40% increase in the number of overnight stays between 2002 and 2008. The average length of stay decreased slightly from 2.6 to 2.3 nights. During a holiday in the Scheldeland region, tourists spend an average of €68 per day, compared to €23 in the Zeeland region. The expenditures are partly determined by the type of accommodation on offer. At present it is not possible to determine annual trends in spendings. There is a growing attention for eco-labels in tourist infrastructure and accommodation, although its share in the total offer is still very limited.

Why monitor this indicator?

The touristic and recreational offer of the Scheldt estuary does not jump straight in the eye. Still, tourism and recreation in both the Dutch and Flemish Scheldt area are considered important economic axes and actions are undertaken to strengthen the range and the characteristics of this offer. The open and salty waters of the Westerschelde provide a different experience than the brackish or freshwater environment of the, sometimes meandering, stream of the Scheldt and its tributaries upriver. Each area has an identity and a unique cultural landscape where beach tourism, boating, hiking and biking have different accents. The target 2030 of the Long-term Vision Scheldt estuary expresses this purpose as follows: 'maintain and strengthen an environment where residents and tourists can enjoy the Scheldt in an active and passive way'.

In the Policy plan for the Westerschelde (1991, [1]) the message is to maintain the existing recreation offer and pursue a limited expansion of recreation 'where considered to be possible and in balance with other interests'. For the province of Zeeland, the objective is that 'the Zeeland leisure industry realizes in the period 2009-2012 a turnover increase of 10% compared to 2008 by investing in new sustainable product / market combinations'. The Socio-economic Policy plan - Recreation and Tourism Programme - 2009-2012 [2] aims to monitor this evolution on the basis of i.a. spendings of foreign and Dutch tourists in Zeeland. In addition, the plan specifically focuses on the increasing importance of environmental labels such as the Blue Flag, the Green Key and the ECO XXI Award.

'Scheldeland' is one of the tourist regions of Flanders and is a collaboration of 29 predominantly rural communities with a connection to the landscape, cultural and / or natural heritage of the Scheldt and its tributaries. Larger cities like Gent and Antwerpen belong to the tourist regions 'art cities', however some less populated communes of Gent and Mechelen are part of the region 'Scheldeland'. One of the objectives of the 'Strategic Policy Plan Scheldeland 2007-2011' [3], aims to broaden the range of accommodation in Scheldeland 'with special attention for small scaled and creative business'. Achieving the targets will be measured by indicators such as recreation on the waterways and in open space, spendings of the day tourism and the residential tourism.

The number of overnight stays is a measure of the economic importance of tourism in an area and provides guidance for the infrastructure needs (water treatment, waste collection and disposal, parking spa-



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ce) and services (drinking water, energy, health, transportation). The (residential) tourism in our regions remains strongly tied to the summer season. This requires additional demands on the environment and infrastructure to absorb seasonal peaks in the provision of tourist facilities. The tourist spendings however stimulate new economic investment, including in environmentally friendly infrastructure and services.



Bringing sustainability in policies on tourism mainly occurs through coordination between the existing international, European and local (environmental) legislation on the one hand and also by implementing mechanisms based on voluntary participation and entrepreneurship. Flanders and the Netherlands increasingly focus on international environmental labels such as 'Blue Flag' (beaches and marinas) and Green Key. The Blue Flag Programme is working actively to achieve an optimum water quality (e.g. Water Framework Directive and the Directive on bathing water quality) and providing and promoting environmental management, education and information in marinas and beaches.

What does the indicator show?

Volume of residential tourism

Both in Flanders and in the Netherlands tourism services seek to accurately map the developments in residential tourism. In Zeeland this is closely followed by the Centre for (Coastal) tourism Zeeland and the Province of Zeeland, with the support of consultin agencies. In Flanders there are several players at municipal and provincial level cooperating with the governmental services of 'Tourism Flanders' under the umbrella of the tourist region 'Scheldeland'.

In Zeeland there is no insight into the number of foreign tourists overnight stays by region or municipality. These data are only available at provincial level, and provided by Statistics Netherlands (CBS). For domestic tourism in Zeeland, data is available on the above-municipal level for the period 2005-2008. These data are collected through sampled questionnaires conducted by the Continuous Holidays Research or ContinuVakantieOnderzoek (CVO). For the area of the Westerschelde, the three relevant tourist areas are Zeeuws-Vlaanderen, Walcheren and Bevelanden & Tholen. The data therefore provide only by approximation what the trends are in residential tourism in the Westerschelde. The number of tourist nights is calculated based on all existing categories of types of accommodation 'hotels / guest houses / youth accommodation', and 'Recreational lodging accommodations' ('Group accommodations', 'Cottage villages' and 'Camping sites'). The rental and the use of second and holiday homes is also taken into account. More information about definitions, coverage and methods is available in the technical fact sheet [5].

The number of holidays by Dutch holidaymakers decreased by 25% to 175,000 in four years time, since 2005 (see Figure 1). Approximately one quarter of these vacations are from 'permanent guests'. Permanent guests, as opposed to 'tourists', use a private accommodation in a fixed location such as a caravan, a permanent place on a camping site or a holiday home [4]. The number of overnight stays dropped by 17% to less than 1.2 million, of which 76% by tourists and 24% by regular guests. The average length of stay of the regular guests increased slightly from 6.2 to 6.9 days, including the day of arrival and of departure. The vacations of tourists are on average slightly longer than those of the permanent guests (7.0 vs. 6.7 days).



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In Walcheren the number of holidays increased slightly from 368,000 in 2005 to 372,000 in 2008 but the length of stay was on average less: 5.5 in 2008 versus 6.5 in 2005. The total number of overnight stays dropped by 14% from 2.4 to 2.1 million. There were 345,000 less overnight stays, especially the number of overnight stays by permanent guests fell by almost 40%.

In Bevelanden & Tholen, residential tourism is slowly rising both in terms of number of holidays and overnight stays. However, an average holiday lasted 5.4 days in 2008 versus 5.9 days in 2005.



Figure 1: Number of holidays (arrivals) and overnight stays of domestic (Dutch) tourists and regular guests in the tourist regions of Walcheren, Zeeuws-Vlaanderen and Bevelanden & Tholen 2005-2008. Source: CVO of NBTC-NIPO Research and Research Centre for (Coastal) Tourism Zeeland.

In relative terms (as a percentage of the total in the three regions), the share in the number of overnight stays of 'permanent guests' in Zeeuws-Vlaanderen is larger (31%) than that of tourists (23%) (see figure 2). This also applies to the number of holidays. The reverse is true for Walcheren where the share of tourist nights (44%) is more important than that of permanent guests (36%). The available data are applicable to a wider area and do not allow specific statements about the importance of residential tourism in the Westerschelde.

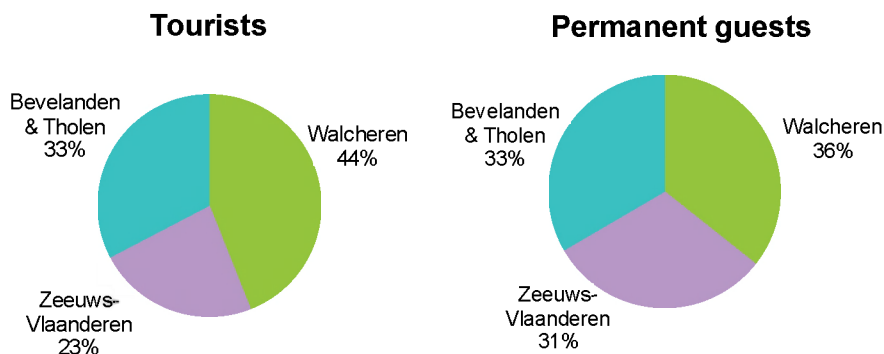


Figure 2: Relative share of domestic (Dutch) tourists (left) and permanent guests (right) in the total number of overnight stays in the tourist regions Walcheren, Zeeuws-Vlaanderen and Bevelanden & Tholen (Situation 2008). Source: CVO of NBTC-NIPO Research and Research Centre for (Coastal) Tourism Zeeland.

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In Flanders, data at municipal level are made available by the Directorate-general Statistics and Economic Information (ADSEI). These data are collected at source for the accommodation types 'hotels', 'campings', 'holiday villages' and 'accommodation for target groups'. The results are not based on samples and can be brought up to the commune level. In municipalities where less than 4 active tourist accommodations are registered, a statistical secret is applied to protect privacy. An additional number of municipalities have no (active) accommodations. In practice this means that for some years, in more than 50% of the communes no data is available or may be released.

On the other hand, Toerisme Vlaanderen (Flanders Tourism Service) and the ADSEI calculate the data for domestic (Belgian) and foreign guests at the level of the 'Scheldeland' region, including the data for the municipalities where a privacy policy is valid (data for the individual underlying municipalities are hereby not disclosed).

The number of overnight stays in the 'Scheldeland' region increased with 40% from 157,000 in 2002 to 220,000 in 2008 (see figure 3). The number of holidays has risen by more than half from 61,000 to 95,000. The average length of stay for a holiday in the region slightly decreased from 2.6 to 2.3 nights. Even expressed in days (3.3 days) this seems quite shorter than the holidays of Dutch guests in the tourist regions of Zeeland.

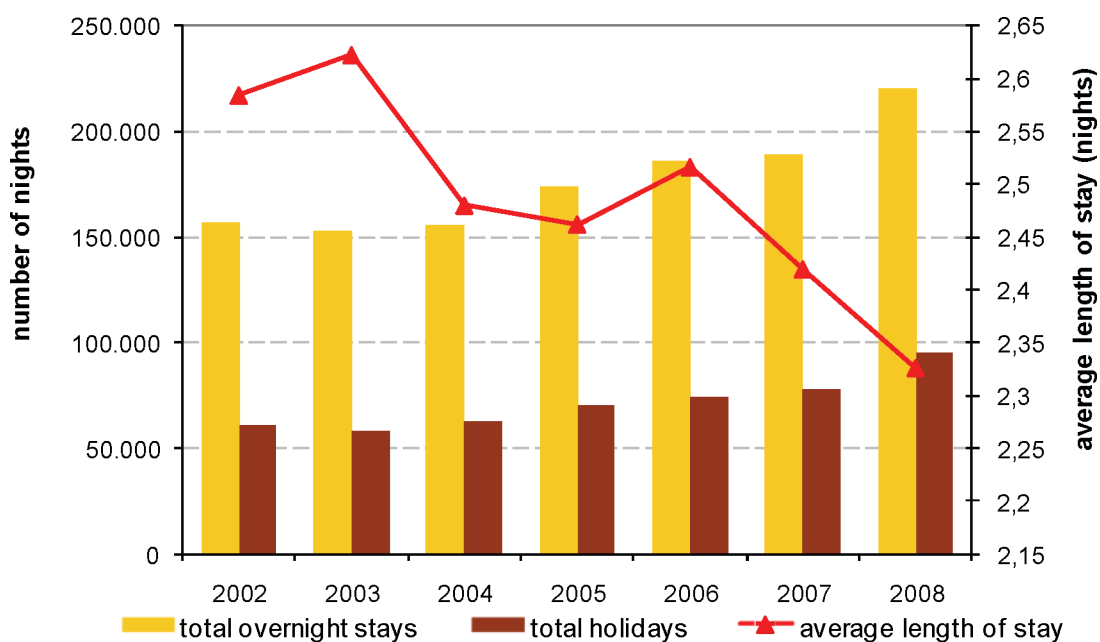


Figure 3: Number of overnight stays and average length of stay (in nights) in the tourist region 'Scheldeland' 2002-2008. Source: Data ADSEI, adapted by Flanders Tourism, Scheldeland vzw.

The volume of residential tourism is generally much lower in the 'Scheldeland' region in Flanders than in the Zeeland tourist regions. This can only in part be explained by the geographical boundaries of the area and the presence or proximity of larger cities. The tourist nights in 'second and holiday homes' of permanent guests e.g. are not taken into account for the 'Scheldeland' region, while in the province of Zeeland these account for 40% of the estimated nights. Figures on overnight stays in campings used as 'second homes' in Flanders are not known, but this form of holiday is taken into account in the Netherlands. A direct comparison of absolute numbers between the two regions is therefore not possible.

In Scheldeland, 44% of the reported overnight stays is spent in hotels (see figure 4). A typical type of accommodation seems to be oriented to 'target groups' (youth accommodation and others) representing 54% of all nights. 'Holiday villages' are virtually non-existent and campings account for 2% of the nights. Zeeland instead, has an extensive range of camping sites, a type of accommodation which generates lower spending.

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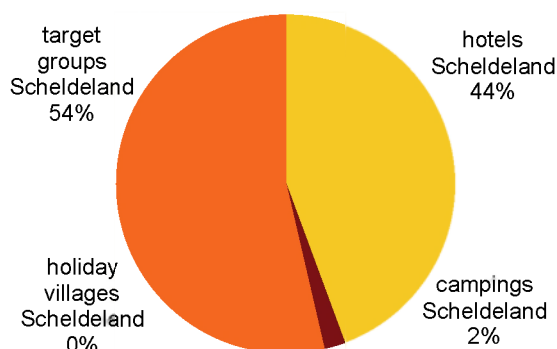


Figure 4: Share (in %) of overnight stays by type of accommodation in the 'Scheldt region': hotels, campings, holiday villages and target groups, 2008. Source: Data ADSEI, adapted by Flanders Tourism.

The offer for group accommodations focuses on the domestic market (Belgians). The overnight stays in hotels are for 30% spent by Belgians, 20% by Germans and 13% by Dutch tourists. In campings, 57% of the overnight stays are on behalf of Dutch guests.

Expressed in terms of the annual number of overnight stays per inhabitant [5], the ratio of residential tourism is put in a slightly different context: Walcheren counts 18 overnight stays per permanent resident in 2008. In Bevelanden & Tholen, this ratio is 13, while in Zeeuws-Vlaanderen 11 tourist nights are counted per capita. Compared with the Netherlands at national level (5 nights per capita), this is rather high. In comparison, the Dutch 'North Sea beach resorts' provide accommodation to 23 tourists for each permanent resident per year. The Wadden sea municipalities set the limit with over 220 tourist nights per permanent resident (figures 2004) [6].

In the municipalities bordering the Scheldt estuary in Flanders, the number of tourist nights per inhabitant is at a ratio of 0.8 (median). The municipalities of Westerlo and Zandhoven are outliers, with around 3.5 nights per capita (see data fact sheet for an overview of the municipalities 'adjacent' to the Scheldt estuary and for which data at municipal level can be released). In comparison, in Flanders as a region, the total number of overnight stays by tourists per annum reach 1.5 per permanent resident.

These figures partly reflect the cultural, recreational offer and typical accommodation in the regions. Together with the delimitation of the area, definitions and methodology, they explain part of the differences in the volume of residential tourism in the regions of the Scheldt estuary.

Spending

Spending in the tourist and recreational sector in the Netherlands are calculated according to the methodology (online sampling) of the Continuous Holidays Research (CVO) [4]. 'Flanders Tourism' conducts an estimate every 5-years (face-to-face survey with tourists on location) [7]. Both studies provide a picture of the extent of the spending of domestic tourism. There are similarities in the demarcation of sectors and types of spending that are taken into account in both methodologies. To determine a trend, it is important to use the same methodology in comparison to a reference year in the same area. It is also useful to have figures corrected for inflation.

Dutch guests spend on average €167 during a holiday in Walcheren. This includes the cost of accommodation, shopping, day trips and other activities during the holiday. This amounts to an expenditure of €25 per person per vacation day (data 2008). The average spending per person per vacation day in Zeeuws-Vlaanderen amounts to €24 and in Bevelanden & Tholen the daytime spending is estimated at €21 per person.

A tourist in the region Scheldeland spends on average €68 per night, compared to an average of €58 in Flanders (2005). The comparison shows that the traveler in the Scheldt region even spends almost 50%



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more for meals, drinks and food items compared to other Flemish regions. The higher spending in this region somehow compensates for the rather limited volume of the residential tourism.

Environmental Quality Label

The 'Green Key' (www.green-key.org/) and the 'Blue Flag' (www.blueflag.org) eco-labels are part of the program of the FEE (Foundation for Environmental Education) [8]. The Green Key is an international standard for environmentally friendly tourist accommodations and is operational since 2007. This eco-label is aimed at youth accommodation and attractions, hotels and guest rooms. These accommodations and attractions need to draw an environmental action plan, and receive guidance in this process. In Flanders, the 'Green Key' and the 'Blue Flag' are managed by the 'Bond Beter Leefmilieu' (Federation for a Better Environment) with support from Flanders Tourism. In the Netherlands, both labels are run by the Foundation for Labeling Environment, Safety and Quality. The Green Key replaces the former 'Environmental Barometer'.

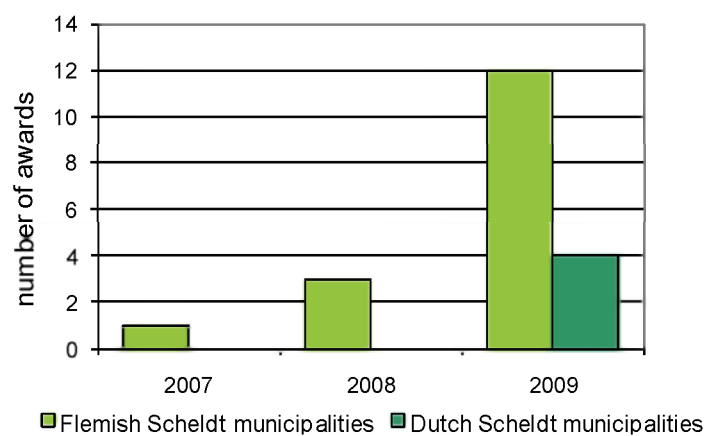


Figure 5: Number of Green Key awards in Flemish (2007-2009) and Dutch Scheldt municipalities (2009). Source: Federation for a Better Environment (Flanders) and Foundation for Labeling Environment, Safety and Quality (NL)

Although the number of Green Key awards in the Scheldt municipalities seems to be rising since the label was launched - in 2009 there were 16 in total - the share of these Green Keys in the total accommodation offer is very limited. In the Netherlands, data from previous years are not stored or made available and it is therefore not possible to determine trends.

The number of 'Blue Flag' awards in the Netherlands tripled since 1999: in 2010 there are 122 at national level and 28 in the province of Zeeland. The majority of the 13 awards in the Scheldt municipalities are located in the North sea coastal bathing areas of Sluis and Veere, but Vlissingen (2) and Breskens (1) also hoist the Blue Flag. In Flanders this increasing popularity of the label is not so clear. Of the 15 approvals in Flanders in 2010, only one Blue Flag is located next to the Scheldt estuary (Marina Willemdok Antwerpen).

Where do the data come from?

- Data on the extent of residential tourism in Zeeland are provided by the Research Centre for (Coastal) Tourism Zeeland, based on data from the Continuous Holidays Research (CVO), NBTC-NIPO Research.
- Spendings in the tourist regions of Zeeland are collected by the CVO and reported by the Research Centre for (coastal) tourism Zeeland.



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- Flanders Tourism reports on arrivals and overnight stays (based on source data from the ADSEI), and conducts market research on recreational tourism in Flanders (spendings, profile, behavior, ...) with specific reporting on for example the tourist region Scheldeland.
- The 'Steunpunt Buitenlands Beleid, Toerisme en Recreatie, Spoor Toerisme en Recreatie STeR (K.U.Leuven)' (Centre for Foreign Policy, Tourism and Recreation, Rail Tourism and Recreation) reports on the extent of the accommodation offer.
- The Federation for a Better Environment (Flanders) and the Foundation for Labelling Environment, Safety and Quality (NL) provide, in cooperation with the Foundation for Environmental Education, data on the European eco-labels.

Opportunities and threats

The (provincial) policy plans provide for an expansion and upgrading of the tourist and recreational services and infrastructure in the municipalities around the (Western) Scheldt. In this process, it is also envisaged to broaden the range of and generate new additional income opportunities for e.g. farmers. Specific projects to leverage the local economy and create new jobs are in design or in execution. While targets and actions are clearly defined, data collection at local level is sometimes limping behind. For the Scheldt estuary and across-border cooperation, it is relevant to dispose of data and visualise trends at the appropriate spatial level, particularly for the measurements 'extent of residential tourism' and the 'spending of day tourists and residential tourists'. Given the limited availability of data, no conclusions can be drawn on the Westerschelde. Data on holidays of foreign tourists is only available at provincial level, while domestic tourism is only reported per region.

In addition to local expansion and addition of tourist infrastructure, cross-border cooperation between municipalities and provinces is also receiving more attention, including the land-water boundary. Recreational boating is increasingly connected to recreational activities along the shore, and passengers are given the opportunity to visit cultural heritage and to participate in recreational events and trips.

The dikes along the Scheldt provide a major attraction for walkers, cyclists and other passive vehicles. This recreational use will be further strengthened and improved. New infrastructure coupled with protection against flooding and for the purpose of conservation and biodiversity protection will not go unnoticed in the tourist and recreational industry. Priority functions such as conservation, tourism and security (the Flemish Sigma plan, the Dutch 'Natuurpakket') go hand in hand.

The Green Key and the Blue Flag labels give recognition to the efforts in the area of environmentally friendly and sustainable business. Environmental sustainability and certification provide an opportunity for a more balanced relationship between the socio-economic interests and nature and environmental protection. They promote and encourage the use of regional products, supporting local economy, and help to alert the local population, government and the tourists' attention to the protection of nature. The potential benefits are considerable. The share of tourism infrastructure, particularly of the accommodations, with an eco-label is still limited. Both in Flanders and Zeeland governments and companies work closely together to explore new sustainable business.

Integration with other indicators / measurements?

In areas with high natural and environmental values, the quality of the tourist infrastructure is to be closely connected to the quality of the environment. The 'status of species and habitats', the 'protection and development of natural areas' and the 'surface water quality', are some elements that determine the quality of the experience of the holidaymaker. Tourists also know how to value this quality money-wise. In addition, indicators for new 'opportunities for recreation on water and land' measure the increase in recreational boating, cycling, the use of walking and hiking trails, and in the offer of accessible cultural heritage around the Scheldt. With an eye for environmentally friendly and sustainable business, enterprises and municipalities also contribute to achieving the targets set forward for the Scheldt estuary.



How to refer to this fact sheet?

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Available online at <http://www.scheldemonitor.org/indicatoren.php>

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