

# Niche Market Exploration for Enhancing Quality Tourism



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A Qualitative Benefit Segmentation Study of German Tourists  
Visiting the Dutch Province of Zeeland in Low Season for  
Contributing to the Temporal Distribution of Tourism Flows

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**Research Report**

**May 25, 2020**

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## Preface

The document at-hand is a research report that was written for the graduation from the study programme “Vitality & Tourism Management” at the HZ University of Applied Sciences in Vlissingen and on behalf of the Marketing Department of the VVV Zeeland in Domburg, both located in the Netherlands. Inspired by the new national marketing strategy for tourism that aims at spreading tourism over the country and over the season for making it a more sustainable and profitable business for every Dutch citizen any place and at any time, the student focused in her own research on the spread of tourism over time in the province she has learned to call her second home: Zeeland.

The student’s big gratitude goes at first to her University supervisor, Lotte Hendriks, who guided the student through her graduation year, approachable and supportive at any moment of question and doubt until the last day of work. Constructive feedback and warm support enhanced motivation and trust into the steps taken. Besides that, the student thanks her work colleagues from the VVV Zeeland, especially the marketing department, who welcomed her in their joyful team, integrating the German “newbie” wherever possible, and coping with any moments of unintelligible Dutch without showing it but being there for any question. Furthermore, special thanks deserves the student’s housemate and close friend Irina Ciobotaru for her unconditional support whenever required.

At last, this research is dedicated to two groups of people: Firstly, the student’s fellow students and friends Akvile Asmenatie, Glory Carrascal, Martina Baleska, Parissa Amirian, and Sarah Ullrich with whom these four special years of study will remain connected with heart-warming memories; and secondly and foremost, to the student’s parents: Nobody else has been there with more understanding, more supportive words, more patience, and more acceptance of nearly any moment of despondency and insecurity in the many years of studying and examination for the student. Thank you a lot!

Miriam Günter

Vlissingen, 25<sup>th</sup> of May, 2020

## Abstract

Tourism shall be the means to an end and “attract different visitors to different areas at different time” (NBTC, 2019, p.28). What is meant by this new vision of the NBTC for tourism in the Netherlands can be seen when taking a look at tourism’s inherent problem of seasonality, described by Butler (2001, p.332) as the temporal imbalance in touristic liveliness at a destination: Whilst beaches are full and tills are ringing in summer, nature is idyllic yet doors are closed in winter. In Zeeland, low seasons thus go along with few incomes in the province’s second biggest economic sector as well as missing liveliness and supply that would make it an attractive and viable place to live. Chances for mitigating low season are seen in German tourists who come already early in the year and leave late in October, also presenting themselves as “weather resistant” and also income-bringing.

Therefore, it was the aim of this research to explore, which German quality niche markets may allow a qualitative lengthening of Zeeland's tourism season. A quality low season tourist is considered the one who loves, appreciates, and supports Zeeland’s identity, brings income - best while spreading geographically -, and becomes a loyal fan.

Consequently, 36 semi-structured in-depth interviews with German tourists and 8 further interviews with customer service employees from tourism offices and a booking centre in Zeeland were conducted between November 2019 and February 2020. This allowed a segmentation of the presented market based on their sought travel benefits. Photo-elicitation increased result density and validity.

The research results mirrored a market that comes primarily for enjoying low season’s inherent tranquillity at the seaside and take advantage of a short travel distance, yet also meets in many points the criteria of a quality tourist. In terms of quality tourism, most attention still attracted those guests who had a longer travel time and accordingly stayed longer at the province, seemingly leading to more explorative behaviour for filling free time. Due to the importance of fostering a qualitative season lengthening, the overall recommendation included an extension of the current market of North Rhine-Westphalia by the federal states of Hesse and Rhineland-Palatinate. Four potential sub-segments positively gained attention:

- Young families with children under school age due to Zeeland’s child-friendly infrastructure and need for a younger image
- Health tourists due to their high appreciation of Zeeland’s pristine nature and healthy sea air, seemingly resulting in high travel motivation and matching the calm nature of low season itself
- Winter campers who were reported to be increasing in number; self-catering, they may increase tourist numbers despite season-related lacks in tourism infrastructure
- ‘Explorers by chance’ who show interest into topics that profile Zeeland towards other destination, namely maritime topics and war history.

Furthermore, winter holidays in February were found to provide a profitable market for families that can visit the province when children facilities just opened for Dutch spring break. Profitability by activity level and geographical spreading neither seemed to be exclusively dependent on the target group but better responding on limited information search behaviour on-site. At last, according to these findings, it appeared to be of minor importance whether a potential segment formed a niche or not as long as quality criteria were fulfilled.

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## 1. Introduction

The province of Zeeland is located in the southwest of the Netherlands where many dam- and bridge connected islands (European Commission, 2018) form a unique coastal structure that provided the name 'land in zee'. Only in 2017, 2.4 million visitors and more than 10 million overnight stays were registered (VVV Zeeland, 2018a, pp. 6-7, 24). Tourism plays a significant role in the province by being the most active player in the service industry and the second biggest economic sector besides trade (European Commission, 2018). The VVV Zeeland contributes to the touristic management on-site by means of promotion, product development, and B2B (VVV Zeeland, n.d.a) and B2C services (VVV Zeeland, n.d.b).

Yet, the province is facing problems to remain an attractive and viable place to live and recreate all year-round. The shortage of workforce affects the viability of companies, including those serving the tourism and leisure industry, which threatens Zeeland's position as an appealing destination but also economic growth. Socio-demographic developments like population senescence are predicted to fuel this problem (VVV Zeeland, 2018a, pp. 22, 26), for instance is the number of potentially employable people forecasted to shrink by 20,000 between 2019 and 2040 (Kaagman, 2019, p. 30). Further suffers the province low name recognition and a weak image regarding weather, cultural offers, vivid cities, diversity, and supply. (VVV Zeeland, 2018a, pp. 3, 10, 33-35) Consequently, for both, the VVV Zeeland (2018a, p. 27) and the provincial authority (Provincie Zeeland, 2016a), the improvement of liveability *in* Zeeland and the value perception *of* Zeeland are strategic goals in their business and political agendas. Tourism is believed to play a supportive role in this, for instance due to its economic relevance, support of infrastructure and leisure offers, and positive impact on popularity and destination image (VVV Zeeland, 2018a, pp. 27, 33).

However, the way of how tourism growth shall take place will significantly differ to the years before. When tourism numbers rise, this must happen *qualitatively*, meaning by better managing direction and timing of tourism flows so that pressure on touristic hot spots will not further intensify but less popular locations profit more from the development and socio-economic benefits of tourism. In other words, liveability has become a matter of precedence in the Dutch tourism industry and shifted stakeholders' focus to spreading tourism flows *geographically* and *temporally* over the seasons. As a result, visitors and especially Dutch citizens shall benefit from tourism at any place and at any time of the year (Nederlands Bureau voor Toerisme & Congressen [NBTC], 2019, pp. 4, 28; VVV Zeeland, 2018a, p. 24; 2018b, p. 4).

This research focuses on the Dutch province of Zeeland and on means of how to spread tourism flows over the year, i.e. on the problem of seasonality that impedes bearable tourism flows in summer and economic as well as social viability in winter. According to Butler, seasonality is a temporal imbalance in the touristic liveliness at a destination (Butler, 2001, p. 332) and a problem that has been gaining in interest the more the tourism economy is growing and driving economic and social developments (2014, p. 2) as seasonality brings numerous economic, socio-cultural, and ecological challenges (Cannas, 2012, pp. 45-47). For the VVV Zeeland (2018a, pp. 3, 7-9, 14, 50), it is the German market that bears most potential for being attracted to low seasons, for instance due to the positive market developments (33% of the guests, thus 789,000 people, were Germans in 2017 which is an increase by 13.5% to the year before) as well as their readiness for short-term trips and loyal return visits. Most notably is however, that the German tourism inflow is less weather-dependent and already by now, the German season is the longest of the year, lasting from April or May until October thanks to the Easter and autumn school holidays. Still, numbers of guests plummet from more than 100,000 visitors a month in peak season to less than 25,000 in low season. The number of overnight guests is just a tenth in February of what it uses to be in July and August.

Thus, summarised, the underlying problem of this research is the existence of strong seasonality among German guests in Zeeland which adds to the restriction of year-round economic viability and perceived liveability within the province. In return, it is the aim of this study to extend the ‘German season’ by the months from November until March (low season) by addressing promising quality niche markets among the existent German target market. This includes an adaptation of marketing efforts and tourism products to the niche markets’ sought travel benefits. Thus, the following main research question results: Which German quality niche markets, segmented by benefits sought, may allow a qualitative lengthening of Zeeland’s tourism season? Three sub-questions shall supportively guide the examination:

- Which tourism products seem to provide tangible travel benefits to German low season tourists in Zeeland?
- Which underlying intangible benefits do German low season tourists seek to gain from tourism products offered in Zeeland?
- Which further demographic, geographic, and behavioural characteristics describe the identified German quality low season niche markets?

Since season lengthening can impact destinations also negatively, the research findings shall, as indicated, critically consider ‘quality tourism’ as it is defined by the VVV Zeeland in the company profile.

## 2. Company Profile







|  <span style="font-size: 24px;">•</span> <b>Factsheet</b> |  |   |   |  |
|---|--|---|---|--|
| <i>Legal form<sup>1</sup><br/>&amp; Executive Board<sup>5</sup></i>   | Association  | <i>Director:</i>  | Erik van den Dobbelsteen  |  |
|   |  | <i>Supervisory Board:</i>   | Mr Ezinga (president), Mr Damen, Mr van Dijke, Mr Suurmond, Mrs de Milliano-Van den Hemel   |  |
| <i>Sources of Income<sup>1</sup></i>  | <ul style="list-style-type: none"> <li>• Own sales</li> <li>• Subsidies from Provincie Zeeland and local municipalities</li> </ul> |   |   |  |
| <i>Address<sup>2</sup> &amp; Communication Channels<sup>2</sup></i>   | VVV Zeeland<br>Schuitvlotstraat 32<br>4357 EB Domburg  | <i>Tel.:</i>  | 0031 – (0)118 583484  |  |
|   |  | <i>E-Mail:</i>  | <a href="mailto:domburg@vvvzeeland.nl">domburg@vvvzeeland.nl</a>  |  |
|   |  | <i>Other:</i>   | Newsletters, Apps &      |  |
| <i>Departments<sup>3, 4, 5</sup></i>  | Marketing & Product Development<br><i>(Route Planning + Digital Innovations &amp; Marketing)</i>                                   | Inspiration-management<br><i>(15 tourist information offices)</i> | Sales<br><i>(B2B Relationships &amp; Reservations)</i>  | Operational Management<br><i>(CEO, secretary, HR, Finance, ICT, Logistics, Facilities)</i> |
| <i>No. of Employees<sup>3</sup></i>   | 19   | 32  | 10  | 9  |

Table 1. Company factsheet about the VVV Zeeland (VVV Zeeland n.d.a<sup>4</sup>/c<sup>3</sup>/d.<sup>2</sup>; VVV Zeeland, 2018b, p. 11<sup>5</sup>) and (A. Woudstra, personal communication, September 13, 2019)<sup>1</sup>

Since January 2014, the VVV Zeeland (also see Table 1) is a merger of all four VVV organisations of the province and the ‘samenwerkingsverband Promotie Zeeland Delta’ (VVV Zeeland, 2013). Together with Kenniscentrum Kusttoerisme and Economische Impuls Zeeland, it forms the “Toeristische Uitvoeringsalliantie” (TUA) that develops complementary tourism products in Zeeland whereby the VVV focuses on the fields of marketing and product development in terms of routes and mobility. Besides that, 16 tourist information offices (‘Inspiration Points’) and a booking centre (‘Zeeland Vakantie’) offer diverse products

and services to the tourist. Further cooperation and co-creation takes place with local, provincial, and national parties such as individual companies and the NBTC (VVV Zeeland, 2018b, pp. 9, 11, 78).

More precisely, the marketing department is involved into all steps of the customer journey and targets the core markets of Dutch, German, and Belgian tourists (98% of the total market) by means of a market differentiation strategy. In order to boost the inflow of German tourists from the federal state of North Rhine-Westphalia (NRW), the VVV cooperates with the agency Mediamixx (VVV Zeeland, 2018b, pp. 31-32, 27) that offers diverse German-Dutch cross-border communication services (mediamixx, 2018).

In the new company mission, the VVV Zeeland outlines its societal responsibility and presents tourism as a mean to transform Zeeland into a loveable, valuable, and liveable destination in which the attraction of quality tourists shall contribute to the prosperity and wellbeing of every inhabitant of Zeeland by 2030. As explained in the introduction, this shall be realised by attracting quality tourists to more diverse places at more differing times, best all year round (VVV Zeeland, 2018a, p. 24; 2018b, p. 4). In fact, quality guests are those allowing geographic and temporal distribution who love, appreciate, and support Zeeland's identity, bring income, and become loyal fans. The vision, "iedereen fan van Zeeland", hence still refers to prior aims of quantitative growth and requires adaption. Eventually, the VVV shall turn from a destination marketing more into a destination management organisation, a 'DMO' (A. Woudstra & M. van den Berg, personal communication, September 24, 2019). This mission is also applied on a national level by the NBTC (2019, pp. 4, 16, 21, 28). Besides attracting quality guests, also image and esteem of Zeeland shall be improved lastingly by exceeding experiences (VVV Zeeland, 2018b, pp. 4-5).

### 3. Theoretical Framework

The following chapter elaborates on important terms and theories that underlay the investigation of the research question and sub-questions, starting with the issue of seasonality and moving over to market segmentation, models about tourism behaviour, and factors that were object of analysis in this research.

#### Seasonality in the tourism industry

Butler (2001) defined seasonality as "a temporal imbalance in the phenomenon of tourism, which may be expressed in terms of dimensions of such elements as numbers of visitors, expenditure of visitors, traffic on highways and other forms of transportation, employment and admissions to attractions" (p. 332). Most tourism destinations experience a few months-long high season of high or highest tourism capacity exploitation, a low season which is perceived to prevent full tourism capacity exploitation, and one or two months-long shoulder seasons that slowly herald the switch from the high to the low season, only being interrupted by some formal holidays that may briefly cause increased tourist flows (Butler, 2014). Researchers agreed on many causal factors of seasonality even though categorisation may differ, for instance climate and man-made decisions like holidays, events, sports seasons, habits, social pressure, fashion (Butler, 2001; Frechtling, as cited by Baum & Hagan, 1999; Hylleberg, 1992), but also the ability and willingness of suppliers and tourism providers to offer attractive tourism products in low season (e.g. Hylleberg, 1992; Baum & Hagan, 1999).

In low seasons, destinations can suffer *economically* from seasonality for instance due to reduced income source exploitation (Butler, 2014), inefficient facility and resource usage (Sutcliffe & Sinclair, 1980) as well as too few and insufficiently skilled available staff which may affect the quality and viability of the tourism product and increase training expenditures (Baum, 1993). In contrast, high-seasons hold



*socio-cultural* issues such as interferences with locals' daily life and environment (e.g. price and traffic rise) (Fitzpatrick Associates, as cited in Cannas, 2012) and the growing antipathy towards tourists (Doxey, as cited in Cannas, 2012), but also *ecological* problems like the threat for the living environment of wildlife and vegetation. This indicates that low seasons actually also offer benefits like nature recovery (Butler, 2014) and timeouts in which locals can retain the living of their local community identity (Mathieson & Wall, as cited in Cannas, 2012). The latter also helps to maintain positive awareness of tourism wherefore Butler (2014) recommends involving locals into decision-makings regarding season extensions. Further he expands, that low seasons allow time for tourism providers to conduct renovations and repairs but also preserve the particularity and attractiveness of a destination or activity which would get lost if they were always available.

For balancing seasonality or reviving low seasons, it appears more reasonable to strive for compensation via adaptation or mitigation rather than overcoming seasonality completely, especially the more low and high seasons differ (Butler, 2014). Six actions for improving seasonality were proposed by Butler, two of them resembling the strategy applied by the VVV Zeeland: (1) The extension of a season by improving the attractiveness of existent tourism products (often by price reduction) so that the market can enlarge; And (2), the adding of non-conventional tourist attractions, usually for specific segments like people searching retirement livings who come all year round or at more desired times of the year. The VVV Zeeland combines this by aiming at an expansion of the existent German market by seeking out and learning about niche groups coming in low season. Tourism products and marketing shall get aligned to their needs and wants so that the attractiveness of Zeeland in low season increases.

### Market Segmentation for Niche Markets

Finding suitable markets means identifying those groups of people, whose needs and wants a company can address by products and services which the customer *wants* to buy and is also *able* to buy. For adapting marketing programmes to needs and wants, market research and market segmentation are conducted, meaning the division of a market into smaller homogeneous groups (segments) of shared relevant customer characteristics that lead to similar or ideally the same needs and wants. Only the most attractive segments will be targeted by a provider (Verhage, 2010, pp. 228-230, 235-236). A sub-segment within one segment can form a niche market (Kotler and Michaelson, as cited by Parrish, Cassill & Oxenham, 2006). Dalgic and Leeuw's (1994) definition of a niche overlaps with those of other authors and consider "a niche to be a small market consisting of an individual customer or a small group of customers with similar characteristics or needs" (1994, p. 40) which can be profitable yet has been neglected by competitors (Dalgic & Leeuw, 1994). Market research and customer intelligence superiority towards competitors is even more crucial for niches than it is for normal segments (Kotler, Burton, Deans, Brown, & Armstrong, 2013, p.105; Parrish et al., 2006). As Kotler et al. (2013, p. 105) elaborated, it is one of a niche's benefits that competitors are missing and addressing their specific needs accurately may allow higher product pricing. Finally, a niche should be big enough for being profitable and have chances to grow (2013, p. 105).

The term '*niche tourist*' is borrowed from the marketing industry and, therefore, shares many characteristics of a normal niche (Robinson & Novelli, 2005, pp. 1; 4-6). Although generalisation holds the risk of fallacy, niche tourists tend to hold the image of being less damaging, more sustainable, and more beneficial for local communities because they are viewed as exclusively selected quality guests rather than mass tourists that are served by an economy of scale (Hall & Weiler and Hall & Lew as cited in Robinson and Novelli, 2005; Robinson & Novelli, 2005). No clear rules exist though about what can and cannot be called a niche market wherefore segments may be broader scaled macro-niches, like cultural tourists, or more defined micro-niches, like art tourists (Novelli as cited in Ali-Knight, 2011, p. 2).

At last, for describing new market segments, standard marketing theory uses demographic, geographical, psychographic, and behaviouristic characteristics such as age, place of residence, lifestyle, and visit frequency (Horner & Swarbrooke, 2016, p. 118). Some authors yet also regard benefits sought as a separate segmentation criterion (e.g. Haley, 1968; Jang, Morrison, & O'Leary, 2002; Kastenholtz, Davis & Paul, 1992). Due to the importance of benefits for understanding consumer behaviour and the expediency of this for the aim of this research, benefit segmentation formed the basis of investigations:

### Examining Consumer Behaviour by Benefit Segmentation

People of one segment show a specific consumer behaviour in selecting, obtaining, consuming, and disposing a product or service for satisfying needs and wants (Engel, Blackwell & Miniard and Solomon, as cited in Horner & Swarbrooke, 2016, p. 6). Mathieson and Wall displayed this consumer behaviour specifically among tourists in their 'Travel-buying behaviour' model ([Appendix A](#), Figure 1) in which the tourist walks linearly through five decision-making phases: He (1) notices desires to travel and weights reasons for and against, (2) collects and compares information about different holiday options, (3) takes a final purchase decision on the destination and further tourism products, (4) prepares and starts the travel, and (5) assesses his or her level of satisfaction which will influence also future holiday decisions (Mathieson & Wall, 1982, p. 28). This timeline determined the order of interview questions of this research and, thereby, served the systematic assessment of tourists' reasoning for visiting Zeeland in low season, hence their tourism purchase behaviour foremost within the first three phases ([Appendix C](#)).

As mentioned, for obtaining an understanding of and predicting consumer behaviour, benefit segmentation was presented as a very efficient technique for segmentation (e.g. Haley, 1968; Horner & Swarbrooke, 2016, p. 6-8; Kastenholtz et al., 1999), reasoned in the close relation of benefits to need-satisfaction that render 'benefits sought' *causal* and not *descriptive* to purchase behaviour (Chung, Oh, Kim, & Han, 2004; Haley, 1968). Benefits sought are said to allow precise segment definition and targeting (Horner & Swarbrooke, 2016, p. 8; Kotler and Turner, as cited in Sarigöllü & Huang, 2005), especially in terms of product development and advertising (Horner & Swarbrooke, 2016, p. 8; Woodside & Jacobs, 1985), and to follow market changes over time (Calantone & Sawyer, 1978; Haley, 1968). Segments always consist of a combination of benefits sought whereby overlapping among different segments due to shared benefits sought are normal (Chung et al., 2004; Haley, 1968). Segments assign different relative importance to each benefit which, thus, helps to distinguish the segments. Also, segments are assumed to aim for profiting from as many benefits as possible (Haley, 1968).

In this research, two in segmentation literature used definitions of the term 'benefits' were applied: On the one hand, benefits were examined as the *destination's attributes* (thus the tourism products on site) for retrieving insights into needs for more tailored product development in low season; And on the other hand, benefits were examined as the *emotional expectations* assigned to the destination's attributes as this retrieved insights into how to better promote a product in low season (compare Frochot & Morrison, 2001; Sarigöllü & Huang, 2005). Henceforth, the terms 'tangible benefits' and 'intangible benefits' were used representatively. *Emotional expectations* are usually also referred to as 'motivators' (Frochot & Morrison, 2001). Heitmann (2016, p. 39) described motivators as psychological needs a tourist seeks to satisfy by going on holidays, yet researching them is difficult as respondents may not want or be able to reflect or express their underlying needs to travel (Dann, 1981, pp. 209-211). Therefore, an indirect research approach first examined the tourism products that were used or planned to be used by tourists and then deduced from them the underlying (intangible) benefits (Sarigöllü & Huang, 2008). Involving other variables like demographics or travel purposes should support this derivation of intangible benefits

(Chung et al., 2004). Hence, this study used an indirect research approach with several factors from the model 'Factors influencing the holiday decision' by Swarbrooke and Horner from 1996 ([Appendix A](#), Figure 2) that support the elicitation of tangible and intangible benefits. The model depicts the as most important perceived holiday decision-influencing factors and is strongly related to the theories on travel determinants and travel motivators. Both are said to influence travel decisions like the destination, the time to travel, and the activities performed, yet there is a thin line of difference where only motivators can intrinsically arouse desires to travel and only determinants can influence the *ability* to travel (Horner & Swarbrooke, 2016, pp. 75, 94, 113-114). This could lead to overlapping between the factor 'personal motivators' and other model factors but was considered in the operationalisation.

### Measuring Tangible Benefits

Tangible benefits match with the factor '*availability of suitable products*' from the Swarbrooke and Horner model. As the outcomes of this research were supposed to avail DMO purposes, Morrison's (2013, pp. 13-15) categories of tourism products from a DMO's perspective were applied. They comprise: (1) *physical products* (e.g. attractions, infrastructure, facilities), (2) *Packages* (e.g. routes connecting attractions), (3) *Programmes* (e.g. events), and (4) *People* (service quality and visitor mix, meaning the simultaneous presence of different tourist groups). Three other components of 'people', namely 'human resource', 'training programmes', and 'positive community awareness about tourism', were adapted, renamed, and merged into 'service availability' and 'hospitality' for applying them more out of the tourist's experience perspective and fit them into the operationalisation.

### Measuring Intangible Benefits

For deducing intangible travel benefits, the following other factors got selected from the model's internal decision factors because they were perceived most relevant by the VVV Zeeland: 'Interests & hobbies', 'family commitment', and 'health'. The internal validity of 'interests & hobbies', 'family commitment', and 'availability of suitable products', in the way they were defined in this study, could be verified by their conformity with variables used by other authors of benefit segmentation research ([Appendix B](#)). Although this was not the case for 'health', other (later explained) aspects reasoned the inclusion. Further factors remained unconsidered due to insufficient relevance ([Appendix A](#), Figure 2). The chosen decision factors are explained in the following:

Firstly, for '*Interests and hobbies*', an applicable definition is the one from Schiefele (1991) about interest as a latent characteristic. He described '*interest*' as a motivation that is linked to a specific topic, task, or activity, that is given valence to by intrinsic values (personal significance) or feelings like enjoyment or involvement. In contrast, a '*hobby*' is, according to Stebbins (1982), a specialised pursuit besides a person's job that is perceived interesting, enjoyable, and long-term beneficial. Oxford University Press (2019) also stresses the temporal regularity in which a hobby is followed.

Secondly, '*commitment*' is of interest as, according to A. Woudstra (personal communication, September 13, 2019), Germans tend to travel with more remote relatives than Dutch who rather limit their travel company to the 'gezin', meaning parents with children. Gitelson and Kerstetter (1990) proved significant correlations between travel parties and certain benefits sought, for instance do couples seem to seek less for benefits related to exploration than do parents with children. Becker (1960) described commitment as a person's consistent way of acting due to constraints from the value system of the social surrounding. Friedmann and Weissbrod (2005) put commitment more into the sociological context and said, considering the theory by Stryker (1992) and Stryker and Serpe (1982), that commitment was a form of attitude that describes the degree of importance someone assigns to a specific social role, for

instance a father role. Hence, in this study, 'family commitment' was defined as 'family roles that oblige to a certain behaviour'.

Furthermore, the provincial authority Provincie Zeeland (2016b) saw good preconditions in Zeeland's appealing natural environment for developing a destination for 'health' tourism, a 'healthy region'. Some indicators for the VVV to assume that health benefits may also influence travel decisions of Germans were: (1) Germans' noticeable interest into wellness tourism (A. Woudstra, personal communication, September 13, 2019), (2) the tradition of and future potential assigned to health tourism in Germany (Bundesministerium für Wirtschaft und Energie [BMWi], n.d.), and (3) the worldwide fast increasing and importance gaining trend of health tourism that is though still considered a niche market. A health tourists' primary motivation is the support of his or her physical, mental and/or spiritual health whereby it is distinguished between wellness and medical health tourists (UNWTO/ETC, 2018). Summarised, wellness tourists seek *preventatively* for the maintenance of good health by boosting and balancing life domains and maybe improving lifestyle behaviour, whereas medical tourists suffer or did suffer a disease and seek *reactively* for diagnosis, intervention, or rehabilitation, yet boundaries may be blurred (Smith & Puczkó, 2014, p. 27; UNWTO/ETC, 2018). It may be clarified linguistically, that the special German verb "wellnessen" means the physical relaxation by taking massages, bathing, or going to the sauna (Duden, n.d.a) and the noun 'Wellness' physical wellbeing (Duden, n.d.b), but both have synonyms like 'relaxing' and 'recovering', or 'wellbeing' (Duden, n.d.c;d) that also indicate a possible mental purpose of wellness.

Eventually, due to the qualitative research approach, it was possible that tourists mention motivators that were not assignable to any of the selected intangible benefit factors (compare [Appendix B](#), Direct Approach). Hence, the factor 'personal motivators' was used as a 'catch basin' for non-assignable needs and included the categories physical, emotional, personal, personal development, status, and cultural needs, as they were described by Horner and Swarbrooke (2016, pp. 75-76).

In summary, for lengthening the tourism season in the province of Zeeland, this research aimed at conducting a market research among German tourists for finding the most attractive and targetable niche markets by means of indirect benefit segmentation. Thereby, the term "benefit" comprised both, the tangible and intangible meanings of benefits for allowing the research outcomes to be used for tourism product development as well as promotion strategies. Accordingly, this research investigated the most relevant decision influencing factors from the holiday decision model by Swarbrooke and Horner from 1996 (with regard to benefits sought) as they had presumably been considered consciously or unconsciously by the tourist during his or her decision-taking process for their holidays. Demographic, geographic, and behavioural attributes, as they were also considered in other benefit segmentation studies, were collected for obtaining a more complete understanding of niche segments. [Appendix C](#) shows a visualisation of the planned research procedure.

## 4. Research Method

The following chapter outlines a reasoned description of the research method including the research design, selection of respondents, operationalisation, ethical aspects, and the data analysis.

### 4.1 Research Design

For finding niche segments among German low season tourists in Zeeland, a destination specific indirect benefit segmentation (Sarigöllü & Huang, 2005) was conducted that included, first, an a priori

commonsense segmentation into the German and non-German market, and second (and mainly), a data-driven a posteriori segmentation based on benefits sought (compare Bigné, Gnoth, & Andreu, 2008, p. 154; Haley, 1968, pp. 31-32). Detecting and defining internally content valid niches required a qualitative exploratory study because the 'market depth' of the niches was unknown and required flexible topic consolidation, and because examining 'family commitment' and 'health' asked for elaboration on tourist's attitudes (compare Veal, 2018, pp. 43, 278). Also, some niches like wellness tourism were already known but required more description (A. Woudstra, personal communication, September 13, 2019). Consequently, semi-structured in-depth interviews (Veal, 2018, pp. 287, 290) of on average 15 minutes recording were conducted. Basing conversation topics on Mathieson and Wall's 'Travel-buying behaviour' model allowed strategically assessing the tourist's purchase behaviour in three interview phases that can be seen in [Appendix C](#). Ordering and pre-formulating questions reduced interviewer-induced biases (Doyle, as cited in Qu & Dumay, 2011) and increased the comparability of research results. Presupposition questions were mainly used to examine intangible benefits as they induce tourists to reflect more on their motivation and behaviour instead of hastily denying connections (compare Patton, 2002, pp. 349, 369-371). In adaptation to the content and course of conversation, supplementary questions were used (compare Veal, 2018, pp. 287) to consolidate the talk or avoid misinterpretations (Kvale, as cited in Qu & Dumay, 2011). The 'politely casual' interview style adapted to the guest's relaxed holiday mood ([Appendix E, Tables 4+5](#)).

Besides tourists, customer service employees from tourist offices in Zeeland and the booking centre Zeeland Vakantie served as a second research sample with complementary expert knowledge and received slightly adapted interview questions ([Appendix E, Tables 6+7](#)). Employee interviews added triangulation benefits as they amended the personal and numerically limited tourist narratives by a broader view on the entire low season market (compare Veal, 2018, p. 157). Besides that, some results got compared to information from stakeholders in Zeeland's tourism industry about the current situation regarding supply and demand. Also, elements resembling the Delphi method were applied by discussing statements of other tourists and employees if the opportunity arose in a conversation. Both served the objectification of interview results (compare Veal, 2018, pp. 144, 292-293).

Additional validity was obtained by photo elicitation in the second interview phase which generally serves addressing larger brain areas and deeper parts of human consciousness, helping respondents to access feelings, memories, more and different information, as well as reflecting on social groups and the own social role (Harper, 2002). Hence, photo cards were shown that displayed a variety of thematically ordered tourism products in Zeeland but also different travel party compositions ([Appendix E, Table 8](#)). They notably helped many tourists visualising their holiday planning or experiences and extended the conversation on before unmentioned tangible benefits and intangible benefits. Photos got adapted a first time before the start of tourist interviews according to given feedback in two employee interviews, and a second time in the beginning of February 2020 according to the current state of results for improving their accurate display of low season tourism ([Appendix E, Tables 6+7](#)).

#### 4.2 Respondents

The population under research comprised on average 95,000 German leisure tourists and visitors (here, generally referred to as tourists) who come to Zeeland within one low season cycle between November and March (VVV Zeeland, 2018a, p. 8). Sample criteria therefore included tourists having their main place of residence in Germany and spending their holidays in Zeeland between November 2019 and March 2020. Excluded were guests coming during the already well visited Christmas holidays. German-

speaking tourists were addressed by the researcher and partly also by receptionists of partner companies by probability sampling based on the ISUM method (compare Veal, 2018, pp. 418-419). Due to the VVV's interest into the small market of young people aged 20 to 35 (A. Woudstra, personal communication, September 13, 2019), at least one interview per month was conducted with people from this age group. Field research already stopped end of February 2020 due to the high numbers of respondents and a satisfying level of result saturation in assumption that March tourists will not differ from other low season tourists and that a point of full saturation cannot be expected in niche market research. Children's opinions were considered in so far as they (do significantly) influence parents' holiday decision making, just like any travel company usually does have some impact on the planning. Accordingly, any recorded comment was transcribed and coded (compare Horner & Swarbrooke, 2016, p. 78). Locations for searching for German guests were 6 out of 37 selected VVV tourism partner organisations ([Appendix F, Table 14](#)), 5 tourism information offices, and from December on also outdoor-locations at tourist hotspots such as markets. Also, both weekends and weekdays were used for doing interviews, all for increasing the number and diversity of respondents. In total, 36 interviews with 72 as official respondents listed tourists ([Appendix G, Table 12](#)) were hold at 12 different touristic places in four regions of Zeeland ([Appendix F, Figure 88](#)). 3 interviews were not transcribed as they did not add any content to already existing results.

Beyond that, a non-probability sample of 7 employees was taken out of the work pool of 18 permanent employees from the VVV Inspiration Points and Zeeland Vakantie. One employee came from the tourism office in Middelburg ([Appendix G, Table 13](#)). Former plans of probability sampling got discarded because expert interviews were required but not all employees were evenly knowledgeable about guests at specific places or regions. Thus, those being stationed only or most at a specific tourist office or booking centre got considered. Over the course of the field research, interviews got scheduled with employees at locations which again got selected based on the following regularly checked criteria: (1) the regions and places that had already been "covered" by interviews; (2) the expected number and type of German tourists presumably visiting a specific place at a specific time for effectively scheduling employee and tourist interviews; and (3) perceived knowledge gaps that revealed from conducted interviews. The same criteria played a role in selecting VVV partner organisations and tourism hotspots for finding tourists, whereby partner organisations were also selected by their type of accommodation offered.

Interviews with tourists were hold in German with a German native-speaking interviewer and were piloted on three Germans similar to the sample criteria for improving the validity of the research design. Interviews with customer-service employees were hold in Dutch. 41 out of 44 interviews were recorded and transcribed word by word but with softened dialects. Narratives that drifted too much from the research content was skipped and unrecorded content written down in notes directly after the conversations (compare Veal, 2018, pp. 53, 358).

#### 4.3 Operationalisation

The examination of the research sub-questions in form of a market research followed a structured order (as explained) in which each interview phase dealt with different holiday decision-making factors ([Appendix C](#)). The latter represented the research dimensions which were grouped under five different concepts which corresponded to the different segmentation criteria, i.e. benefits and demographic, geographic and behavioural characteristics. The first research question examined the tourism products used by German tourists in Zeeland during low season and, thus, explored the tangible benefits. The related factor under research was 'availability of suitable products' which was sub-divided into physical

products, people, packages, and programmes. The second research-question referred to the underlying intangible benefits and investigated the factors 'hobbies & interests', 'health', 'family commitment', and 'other personal motivators'. 'Health' comprised the two sub-dimensions wellness and medical tourism and also motivators were broadly sub-divided according to the theory. Sub-question 3 enriched the characterisation of the niches by indicators from the demographic, geographic, and behavioural concepts. [Appendix D](#) shows the final operationalisation table after the completed coding process. Segments were spotted within the grouping of similar benefits and tourist characteristics and, in the future, can be better targeted and enlarged by means of aligned tourism products and promotion.

#### 4.4 Ethical Aspects

The purpose of this research, namely the contribution to more quality tourism in Zeeland, was itself of ethical nature and acted within the societal responsibility to which the VVV Zeeland committed itself. Concurrently, the researcher took distance from any form of altruism or goodwill abuse but obliged herself to honest information provision about all aspects concerning the interview and left it to every respondent's voluntariness to start and stay within the interview until the end and to respond on every question. Answers were dealt with objectivity and tolerance and data protection was ensured by anonymisation of participants and keeping data confidential (i.e. no publication of recordings or transcripts). Day and time of employee interviews were not reported for avoiding backtracking by work schedules yet was interview content also deemed innocuous for job positions. All interviews at non-public properties were taken after agreement from the owning authorities (compare Veal, 2018, Chapter 4). At last, the student declares this research to be her own work and published work of others is clearly attributed.

#### 4.5 Data Analysis

This explorative research was a process of ongoing inductive hypotheses formulation and formulation improvement (compare Veal, 2018, pp. 285-286) regarding which benefits sought could jointly represent potential quality niche markets. Data were stored and processed via the programme QDA Miner lite which focuses on qualitative research analysis and offers good overview on much text and many codes by means of coloured tree structures and fast text search (compare Provalis Research, 2018). After interviews had been transcribed in the language they were held, they were deductively and inductively coded based on the operationalisation indicators or sub-dimension definitions. Since a sub-segment within one segment can form a niche market (compare Kotler & Michaelson, as cited by Parrish, Cassill, and Oxenham, 2006), notably more benefit codes were inductively retrieved since deductive codes from literature described too broad segments that required specification (e.g. water sports). The analysis method took place in three phases ([Appendix H](#)) which technique was derived and adapted from quantitative benefit segmentation studies by authors like Sarigöllü and Huang (2005), Davis and Sternquist (1987), Gitelson and Kerstetter (1990), Frochot and Morrison's (2013) review on benefit segmentation applications, and Haley's (1968) advices on benefit segmentation. Market results were then segmented on benefits sought. Spotted segments got discussed on the basis of literature, industry information, and the definition of quality tourism and lead to several conclusions and recommendations.

#### 4.6 Limitations

This research is a destination-specific benefit segmentation with focus on German low season guests in the province of Zeeland wherefore results and conclusions cannot be claimed applicable on other destinations and guests with other nationalities or on those visiting Zeeland in high season. Also, explorative research for finding niche markets can barely reach a point of saturation considering the large population under research and, as noted by Novelli (as cited in Ali-Knight, 2011, p. 2), the unclear

rules about what can and cannot be called a niche market. The research was still extensive for its kind and the results from triangulation strengthened observations among many benefits of tourists which is also visible in the frequent occurrence of letter codes in the 'fields of benefits' in [Appendix H, Tables 14-15](#). Yet, the quantity of results also restricted the vivid and individually profiled description of each market in the results wherefore more details remain for the research presentation to the company.

Regarding the research results, language- and culture-specific meanings may have been missed by the German native-speaking interviewer since interviews with the customer-service employees were held in Dutch language. However, general understanding was not affected and recording allowed detailed content re-checking. Two recorded interviews at the Brouwersdam (G40,G42) included strong acoustic interruptions by strong gusts wherefore sound quality needed improvement by the programme WafePad Audio-Editor. Text gaps were filled by promptly taken notes from the researcher's memories. Notes were also taken about three unrecorded interviews (G9, G41 and G56/57) and about comments that were added after recording (G12 and G59). Still, this interview content was incomplete regarding details and may include memory-caused biases wherefore notes were not quoted. Furthermore, since interviews with guests happened ad hoc and participants were unknown to each other, interview length depended on the respondents' availability of time. In this point, the photo elicitation often served as a timesaving and also data enriching tool that allowed covering all interview topics. Furthermore, the researcher might have been withheld of information considered as private, such as detailed health-related benefits, yet research purpose and shared nationality seemed to support respondents' openness. Also, in their narratives, respondents sometimes drifted to content about holidays outside the defined low season period which the researcher tried to identify and clarify early enough for ensuring data validity.

In addition, the photo elicitation technique was very useful but the number and variety of available photos for low season in Zeeland was limited wherefore some photos depicted low season topics but in a high season setting (e.g. events). On the one hand, this contradiction usefully triggered discussions about seasonal differences and missing tourism products, on the other hand, certain memories of feelings may not have been addressed and remained unspoken. Also, interim result-evaluation indicated the meaningfulness of a second adaptation of the photos. Accordingly, this happened a bit late during the last month of field research whereby earlier adaptation may have deepened or expanded conversations.

## 5. Results

49 tangible benefits were found in all the four types of tourism products, i.e. physical products, packages, programmes and people ([Appendix H, Table 14](#)) and other 47 intangible benefits in the dimensions interests and hobbies, health, family commitments, and other personal motivators ([Appendix H, Table 15](#)). Certain groups of benefit combinations (compare Haley, 1968) emerged ([Appendix H, Table 16](#)) which stood out differently pronounced during the interview phase, some continuously prevailing, others being mentioned sporadically but striking in content. Since the number of taken interviews allowed seeing differences in less and more dominating benefit clusters, the number of interviews in which a benefit got mentioned is indicated and must be read in relation to the total number of 33 transcribed guest interviews (G.i.) and 8 employee interviews (E.i.), strictly considering that these have no representative meaning for a market's size. Employee answers mainly concerned the



region or city they represent as professionals and should be read in that context<sup>1</sup> and that they refer to low season guests in overall. An overview on the found clusters and potential segments in detail and in combination with relevant demographic, geographic or travel characteristics is found in [Appendix H, Tables 17-19](#). Interview statements of guests and employees dominantly harmonised with each other. The chapter starts with an outline of respondents' overall shared benefits for spending holidays in Zeeland during low season as well as their main activities, followed by a description of specific groups that gained attention as they met certain criteria of a quality and / or niche markets.

#### *Main reasons for coming to Zeeland during low season*

Low season guests were observed and reported from employees to comprise mostly couples aged 50 and above who have adult children or no children whereas other guests are often families with children under school-age ([Appendix G, Table 12](#)). Visible among respondents and confirmed by employees was, that low season tourists are “often recurring guests” (IP.G/V) who visit Zeeland at least once a year (21 G.i., 6 E.i.). Regarding benefits sought, close to consistently (31 G.i., 8 E.i.), the **seaside** “that we do not have at home” (G8) was mentioned as one or the most important reason for spending holidays in Zeeland and appeared largely connected with the **indulgence of nature** (28 G.i., 8 E.i.). Some respondents positively highlighted Zeeland's coastline in comparison to the Belgian one as it “has much more flair” (G7) thanks to its **unspoiled naturalness** (4 G.i., 1 E.i.):

G34: „Well that's also why we don't drive to the Belgian North Sea because Belgium is also, well, there are only these skyscrapers, these stalks, [...], it's a neg.... 'negative-example'.”

**Enjoying Zeeland's “nice” and “pretty” nature in general** (although some guests might have only meant the seaside) was named by markedly many guests (22 G.i.) and was partly even a main reason for coming (11 G.i.). “[M]ostly” **walking** (20 G.i., 4 E.i.) as well as **cycling** (15 G.i., 8 E.i.) belonged to the salient activities. Respondents but especially employees also mentioned Zeeland's **space** that allows “looking far, watching into the distance” (G3; also: IP.A/G,IP.D/Z,IP.F/R,G50/51) and enjoying “these endless walks along the beach” (G50; also G10,G20,G51). However, spending time at the seaside in Zeeland was also noticeably connected to the vicinity of guests' **place of residence** in Germany and the convenience of **reduced travel time** (20 G.i. and 2 E.i., out of these 14 G.i. mentioning vicinity as a main travel benefit).

G2: “[T]hat's the shortest way from us to the sea. Right? Well we also have the German North Sea coast, but that's quite some more far away.”

Also, “one is relatively flexible as one normally comes by car.” (G17) Indeed, almost 75% of respondents came from the southern part of NRW, the region that shares borders with or is closest to Limburg. Also, all employees estimated this area or NRW in general to be the main **place of residence** of German guests, IP.F/R and IP.G/V defining it within a radius of 3.5 driving hours. Driving time among respondents with this benefit ranged indeed from 2 hours from Aachen and western Rhineland, over 3 hours from Cologne and the Ruhr area, to 4 hours from Frankfurt, the latter already lying in the federal state of Hesse ([Appendix G, Fig. 91](#)). Guests with these benefits predominantly stayed for a maximum of 3 nights (15 G.i.): “Well we drove about three hours and a half what, as I find, is acceptable for a weekend” (G7;

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<sup>1</sup> Relevant abbreviations for reading the results in context: IP = Inspiration Point employee; TI=Tourism Information employee; ZV = Zeeland Vakantie employee; last letter of an anonymisation code stands for D = Domburg, G = Goes, M = Middelburg, R = Renesse, S = Sluis, V = Vlissingen, Y = Yerseke, Z = Zierikzee; More: I = Interviewer / Researcher and G(x) = Guest / Tourist

also IP.F/R, [Appendix G, Fig. 92](#)). Another main reason mentioned with striking conformity among respondents and employees for visiting Zeeland during low season, partly preferably (4 G.i.) or even exclusively (6 G.i.), was the reduced number of tourists that allows enjoying a pleasant **tranquillity** (22 G.i., 7 E.i.) which is impossible during high season:

G3: *“It is on purpose that we come now ‘cause then it’s empty here, we don’t want to run over full beaches during high season. [...] We really come specifically in low season [...], then it’s rather nice and calm here. “*

Respondents enjoyed this *“significantly more calm”* (G13) time of the year especially at the empty beaches (G22; 10 G.i.). ‘Empty Zeeland’ was also mentioned to be *„a little bit more authentic“* (G39), giving the ‘chance to experience the real Netherlands’ (G51), for instance by enjoying the **atmosphere** of the ancient buildings (G23) and having more contact with locals (G56/57) who are also more **hospitable** (5 G.i.) and *„not that annoyed yet“* (G23) in low season. As G3 (see quote above) already indicated, some or even heavy dissociation was occasionally expressed to what respondents called judgingly or even pejoratively ‘tourism’, ‘the tourists’, or even ‘the Germans’ in summer (G5/6;G22/23;G30;G39;G43;G51; G56/57;G58;G69;G71/72). G52, G56/G57, and G58/G59 even on purpose spend their holidays in Zeeuws-Vlaanderen as it is calmer than the upper islands, though are they worried about the visible developments and changes towards a tourism place, making them consider about other destinations:

G58: *“And this is what we valued a lot about Breskens, that it’s not a tourism place yet. But there is a tendency towards that now. [...] [T]herefore, we must look again how long it stays like this, that... that it does not become too extreme with the tourism.”* (also: G56/57)

Matching to this was also the appreciation of the **relaxed mentality** that got assigned to the locals (5 G.i.): *“Everything is here some more decelerated”* (G27), *„it’s simply that they chill completely differently than we do, that’s such a hectic at home in Germany, like crazy, [...]. We enjoy that.”* (G20) Guests who did not mention tourist emptiness as a low season benefit were either younger than 40, visited low season only exceptionally, or came exclusively for sporting. Other intangible benefits that got assigned high importance among many guests were **relaxation** (17 G.i., 1 E.i.), **fleeing and recovering from everyday life** (16 G.i.), and for some also overall **wellbeing** (10 G.i., 3 E.i.) which sometimes had small medical connotations. Yoga at the beach was yet rather done in summer, according to IP.F/R. Especially in connection to the first two benefits, guests reported to be *“unwinding”* (G1; 12 G.i.), *“coming down”* (G3,G17), and getting away from *“stress at work”* (G2,G3/4,G20,G29) and *“from home”* (G14,G67).

G68: *“We need a bit of a break from coming under fire at home, whether it’s the children, the job, friends, there is always something... You nearly don’t have any day on which not from anywhere the message comes: ‘Can’t you do this, can’t you do that, do you have that, do you do that’...”*

In particular weekend guests explicitly connected these three benefits with spending time at the seaside (7/10 G.i.), finding that *“[...] the sea itself, per se, is already quite relaxing and recovering, ...”* (G17).

### *Main activities*

A typical activity among respondents and overall low season guests seemed to be visiting **cities** in the surrounding (25 G.i.; 6 E.i.). Usually having their accommodation close to the sea (6 E.i.; see [Appendix G, Fig. 89](#)), they may spend a day for instance in Middelburg (12 G.i., 2 E.i.), Vlissingen, Veere, Domburg, Zierikzee, Goes, Sluis, but also Rotterdam or Belgian cities. According to IP.D/Z and IP.A/G, Zierikzee and Goes are often ‘fortune-destinations’ as *“many people”* (IP.D/Z) come, for instance, when *“they are on*

*their way home and they still have time left and then do an outing. [They] then continue coming back because it's so beautiful* (IP.D/Z). “A bit of **shopping**” (G7) and “*bummeln*” (G10, roughly translatable with ‘strolling through the city and window-shopping’) in the smaller or bigger cities belonged to many respondents’ holidays in Zeeland or the Netherlands in general (18 G.i., 6 E.i.), reasoned by some guests with the “**tiny**” and “**pretty**” shops (5 G.i., 1 E.i.) and the interesting products that cannot be found elsewhere (G25,G56/57,G71). Remarkable was the preference for **markets**: “[Y]es, Germans like everything in the field of markets, all kinds of markets (*laughing*)” (TI.G/V; 13 G.i., 5 E.i.), even the common week market where guests “*look around*” (G44), shop a bit and try some food (G60-65). Certain guests even came over all the way from Zeeuws-Vlaanderen to visit the market in Middelburg (G49-53,G67/68,G69/70,IP.G/V). Most respondents merely liked strolling around and exploring the cities without specific interests, some explaining that they love in general the pretty and well maintained **typical style** of Dutch houses, the historic architecture, and the townscape (11 G.i., 3 E.i.) where everything is a bit “*small*”, “*cosy*”, and spreading a specific “**atmosphere**” (4 G.i.), especially when Christmas lightning is on in December (2 G.i.).

More willingness in **exploring** the city strategically, maybe also **culturally** (7 G.i.), appeared to have those visiting the VVV Inspiration Points: Guests “*come nine out of ten times for getting a city map*” (IP.D/Z), but also “*often [...] with specific questions*” (IP.G/V). Some show interest into **monuments** (9 G.i.) like churches, city halls (IP.A./G,G20,G35,IP.D/Z,G47), city walls and ports (IP.H/S) or **museums** (8 G.i.; 2 E.i.). Guests also “*really come to buy the guided walking tours*” (IP.H/S; also IP.A/G,TI.C/M,IP.D/Z,IP.F/R, G12/13) or at least they accept the employee’s offer to buy one, having the positive effect that “*they come back some more frequently ‘cause it’s nice*” (IP.D/Z). Guests with interest into culture seemed “*to be primarily the some older, older German guests*” (IP.G/V), meaning those 50 years and more (12/16 G.i. with cultural interest, 2 E.i.) and “*the back-coming guests who already know some more*” (IP.G/V) about the province or a city. Yet also families showed interest (4/15 G.i. culturally interested guests).

Regarding city trips, it was also mentioned to be specific about winter that “*the villages are kind of died-out, there are not that many people and there’s nothing open, so then [...the tourists...] come to the city*” (IP.D/Z). Indeed, guests appeared to come to cities for accessing **shopping infrastructure** (18 G.i., 6 E.i.), but eventually also for experiencing more “**Geselligkeit**” (IP.D/Z), “*liveliness*” (IP.G/V), “*variety*” (G25, also G24), as well as for the second very important **infrastructure of gastronomy** (12 G.i., 4 E.i.; total for gastronomy: 25 G.i., 4 E.i.): “[I]n cities like Middelburg, you can dine somewhere every evening” (TI.C/M) and in Vlissingen, one “*can sit here cosily and enjoy eating outside, so there are some nice bars, cafés and restaurants here*” (G25). Although the overall closing of premises in low season received broad understanding in light of low rentability or needs for renovations (G1,G37,G40,G20,G42,G71/72), the infrastructure of shops, gastronomy, and bike rental in more rural areas was mentioned to be improvable (7 G.i., 3 E.i.) by more alternating opening times of restaurants (G1/2,G3/4) and clearer and more consistent online and offline communication of closing times (5 G.i.). Thus, it could happen that „on Google, it says also that the pavilions are closed, but many are indeed open” (G20), and the other way around, “*when you call, nobody picks up, no voice mail for instance telling you: ‘we are closed’, ‘we are on holidays’, something, an info, [...] well and then it’s closed.*” (G4) More transparent opening times were even recommended for the tourism hotspot Domburg (G1/2,G10/11,G12/13).

G20: „Well one has such a feeling that it’s not taken that seriously, the tourism season now.“

G4: „[B]ut the low season is also a season.“

IP.D/Z added further, that *“it must be looked up when there is a feast day in Germany, eh, in November, there are still some days, [...] that then it’s open here, also the museums and such things”* (IP.D/Z). Indeed, the **information infrastructure** also seemed to impact guests’ activities on-site: Short- but also long-staying guests mentioned, that they would probably do more if offers were more visible (6 G.i.), meaning that information was findable online *“more straight away”* (long-staying G21) or even without *“explicitly searching [...] When one came across something randomly, then one would say for sure: ‘Oh yes, that could maybe be something’, but otherwise...”* (long-staying G26; also short-staying G17,G30/32). G30 proposed to hang out more posters like in summer, *“[t]hat’s also something that addresses us a lot”* (G32), and G17 recommended *„[...] coupons, or more brochures in the accommodations, like I haven’t seen any leisure offer I could have done here now. Anything obvious [..., though...] I find it good not being bombed by ads“*. Indeed, weekend guests G71 and G72 visited the Watersnoodmuseum because of a flyer that was lying out in their hotel. However, it was also notable during the field research, that tourist offices outside of Domburg were not intensively visited by Germans, reasoning among other aspects the extension of the research field to on-street interviews. TI.C/M summed up her opinion about the variability, quality, accessibility, and communication of tourism infrastructure in Zeeland as follows:

TI.C/M: *“[T]hat the information is just 100%, that I find most important. You must really make use of the things that are already there [also IP.D/Z,IP.E/Y,IP.G/V], that are already very good, what they already come for, and that you must make good. And keep it good. [... A]nd then you say on a birthday festivity: ‘I was here and there, and oh, and so nice, and we did this and that. We had a beautiful accommodation, we dined well’, that’s promotion! [...But...]look, when there is nothing to do and there is nothing open, then also nothing happens. So you must keep the ball rolling...”*

IP.E/Y from the more remote destination of Yerseke though looked at the accessibility of premises from a different perspective: *“[I]f there are no tourists in the region during low season, then the gastronomy must of course close, or at least for a few days.”* In relation to this debate about demand and supply and who needs to set the incentive, the tourist or the provider, one group of guests was showing noticeably more demand in explorative holiday benefits than others, standing out by their place of residence:

### **Long-Staying Guests**

As mentioned, a substantial part of German low season guests comes from NRW, though according to TI.C/M *“[...] also increasingly from more far away”*. These guests, were perceived to be more from the southern part of Germany (TI.A/G, TI.C/M, TI.F/R) which corresponds to data from guest interviews: **Guests from outside of NRW** arrived from Hesse, Thuringia, Rhineland-Palatinate, and southern Bavaria ([Appendix G, Table 13 and Fig. 90](#)), though did G11 remark that her arrival from Rosenheim was indeed an exception as the Italian sea was actually closer. Related to that, IP.F/R and TI.C/M also mentioned assumptions about the competing position of other holiday destinations at the Northern and Baltic Sea, addressing what was already stated by G2 who came to Zeeland for the vicinity:

TI.C/M: *“[P]eople who, let’s say, live ‘on the level’ of Friesland, those people, they go there, [... ‘to Friesland and the water islands’,...] there you also have sun, sea and sand.”* (also: IP.F/R)

Furthermore, whilst **length of stay** of respondents from NRW was often remarkably short with at maximum three nights (18/23 G.i.) and focused on the weekends, almost all guests from more distanced federal states stayed longer (9/11 G.i. from outside NRW, 2 E.i., [Appendix G, Fig. 91](#)), G11 from Rosenheim who came with her parents from Frankfurt commenting on her 8-day-long stay with: *“Well when you drive that long...”* (G11). Interviewed guests with a longer stay made up a bit less than half of

the sample (46%) but stood more in connection with explorative and culture-related activities such as visiting museums, monuments and sights, and attending cultural events. These were never the main reasons for spending holidays in Zeeland in general but self-selected activities for spending time. The **museum visitors** (8 G.i., 5 E.i.) among them were usually associated with rather broad interests (also IP.A/G;TI.C/M;IP.F/R;G44) and visiting “*all kinds*” (TI.C/M) of museums. Guests also appeared to visit those expositions that are nearby. Especially when length of stay in Zeeland was short, guests’ decision to visit museums appeared influenced by factors like weather (IP.A/G,G52,G71), costs (IP.A/G), and availability of time (G17,G52). However, when considering also **sights and monuments** (11 G.i., 2 E.i.), **World War II** memorials were predominantly mentioned (7/13 G.i. with interest into monuments and/or museums), G20 even telling about a friend “*who visited all that, the places [that witness ‘what all happened there’... ‘also during war times’]*”. Guests visited or consciously passed by sights (G24,G26,G44/45), reported about “*very interesting*”(G13) but also ‘moving’ (G13) and “*shameful*” (G13) moments of unplanned confrontation with the topic (G12/13), and showed theoretical but genuine interest into visiting museums such as the ‘Bevrijdingsmuseum’ (G13,G17,G26,G44). However, employees could not confirm any interest into World War II attractions (TI.C/M, IP.F/R,IP.G/V,IP.H/S):

IP.G/V: “*No, I also rather have the impression that, now and then, it’s a feeling of shame, maybe... Yeah, just because: ‘Well, I’m German and what all happened there during the war...’, I think that it’s also quite some shame why they don’t ask. [also TI.C/M,IP.H/S] ... [A]nd we also have, for example, the bunker route tour in our assortment [...]. I’ve actually never sold it to a German.*”

Besides World War II, more specific interest also existed among some guests in **maritime** attractions: **Ships** in general (G44) and “*[w]atching ships*” (G7; 6 G.i., 2 E.i.) at the boulevards of Vlissingen and Breskens seemed to be appealing, IP.H/S reporting that “*you often see [people doing] that*”. “*[C]onnected to the ships [is] also going on boat trips ‘cause a German often loves that*” (IP.G/V; 6 G.i., 5 E.i.). The request for **boat trips**, which also includes ferries, appeared to not always being met by supply though, either because at harbours like in Goes “*we don’t have a boat trip*” (IP.A/G), “*there are not many boat trips offered in low season*” (IP.E/Y, also IP.D/Z), or because offers were not extensive or well communicated enough for guests like G24 and couple G25/26. The latter two had specific interests into **harbours** and “*the movements on the Westerschelde*” (G24) and missed “*guided harbour tours, and then really [about] these big transshipment ports [...] and also the information about this [in Vlissingen]*” (G24; also G25/26). However, G26 also admitted that they “*haven’t really looked for [...a harbour tour...] yet*” (G26). As IP.G/V summed it up for the destination of Vlissingen: “*[E]verything related to water and ships, they really like a lot.*” Related to this, the **Deltaworks** got notably more selected from the photo cards and described closer by some as a “*very interesting*” (G13) and “*impressive*” (G39; 10 G.i., 3 E.i.), yet did guest respondents with a short stay ‘*always [...only...] drive over it*’ (G42).

Regarding cultural events, **Sinterklaas arrival**, especially by boat in Vlissingen and Breskens, stood out as a specific event which “*people who have been more frequently to the Netherlands and know Sinterklaas*” (IP.G/V), whether they come with or without children (IP.G/V), “*consider as a nice festivity [...] where they also come for*” (IP.D/Z). Indeed, long-standing guests raved about the event (3 G.i.) as something they either come for (G67) or would always like to see (G58), calling it a “*beautiful*” and “*real spectacle*” for the children and themselves as grandparents (G67) and a “*nice tradition[...] that one likes to participate in a bit*” (G10). As a second, **Straô-riding** was visited by house-owners G43-45 and mentioned to be an event where some Germans “*come for extra*” (IP.D/Z) or at least “*coordinate a bit their time of taking holidays with*” (IP.F/R). Furthermore, unlike longer staying guests, guests with a short stay partly

mentioned **missing time** to be a **reason for not exploring** more the destination (8 G.i.), stating that „if we had more time, I'd also go into a museum here” (G52), or „ [i]f one stayed here for a week, then one could look around whether there is a small festival at the beach or something like that” (G4, also G18/19,G70).

G19: „I think that's just for people who come here for a week or something like that, then you rather look around a bit.“

G71: „[B]ut when we go to Holland for three nights [...], then we don't plan a lot.“

Planning behaviour indeed differed seemingly: Among those respondents who mentioned their source of information about offers or events on-site, all those staying three nights and longer looked up some information online (some more, some less thoroughly) or additionally visited an Inspiration Point, either for questions or getting the 'badkoerir' (12/12 G.i.). In contrast, most shorter staying guests did not look up anything, merely a good place to eat (8/12 G.i.). This planning behaviour is in line with IP.A/G's and IP.D/Z's experience that the first trip to Goes or Zierikzee was often by chance and time-dependent.

### **Families**

Guests from other federal states than NRW were not only interesting due to their longer stay and higher activeness, but also regarding their family life-cycle: 6 employees said, that low season is a time to be visited by families with children under school age, 2 also mentioned families with schoolchildren who are though bound to holidays. Families who came or had once come to Zeeland with their children (11 G.i.) stood out with special interests: “[T]hey come for other things [...], really something specifically for the children” (IP.G/V) that is mostly aimed at bringing **fun**. Thus, **entertainment facilities for children** such as swimming pools, indoor playgrounds, child-attractions like 'Stoomtrein' and 'Vlindertuin', and child animation were intensively used tourism products (7 G.i., 6 E.i.), but also going with the children to the **beach** (4 G.i., 2 E.i.), doing **activities related to animals** (8 G.i.), going on a **boat trip** (4 G.i.), following the **Sinterklaas** event (3 G.i.) but also visiting **museums** (2 G.i.). In overall, children activities dominated in holiday-descriptions of interviewed families (8 G.i., 5 E.i.).

G18: “[Y]ou change, you know, with a child also the priorities change a bit regarding what you do [... although...] we normally wouldn't be interested.“

Indeed, G67 and G68's main reason for coming regularly to Zeeland was their daughter's health status, G43 drove “who knows where” (G43) for her daughter could do horse riding, and G63 searched a museum “where it's also interesting for children” (G63). Employees also described family's place of stay to be outside the city (TI.C/M,IP.G/V) and where there is **space, nature** (G67,IP.G/V), the **sea** (TI.C/M,IP.E/Y), and maybe “a very child-friendly **park**” (TI.C/M) like “Landal or in Roompot [...] 'cause there they have those facilities” (IP.D/Z; also IP.G/V, 5 G.i. [not known for all families]). Some parents also highlighted very positively Zeeland's child-friendly infrastructure, from the play corners at the gastronomy and in shops to the indoor-playgrounds, animations, and events at living and recreation parks (4 G.i.). However, offers are also time-dependent in low season as “there is not that much open for children [...until...] holidays start”. Families G60-65 from Speyer noticed this difference during their winter holidays that got introduced in Rhineland-Palatinate in 2019, seemingly not knowing that their holidays overlapped with Dutch spring break:

G61: „ It's really a lot during this week, it surprises me. When we were there in autumn, there was not that much programme.” [Dutch autumn holidays started one week later that year]

G63: *“And in other areas... we are rather the people who fly, you know? Now in winter, you don’t get that much there for children. The season has then not opened yet, right? It’s more in the summer-, autumn holidays [‘that they have so much for children’]. I find that quite good [here].”*

Winter holidays in other German Federal States are no focus for promotion by the VVV Zeeland, though did contacted partner organisations recommend this time for doing research due to higher visitor numbers. The owner of a campsite on Walcheren mentioned that in the week around carnival, *“a combination of families and couples [...booked this year and that...] this is also a time period that used to be calmer before and that for us has been becoming more busy exactly since the last year”* (R. Westrate, personal communication, January 17, 2020). Furthermore, spending childhood in Zeeland also appeared interesting in terms of **nostalgia** and **familiarity**: IP.A/G and ZV.B/D reported, that *“some Germans, they were already here in the past as child [...]. Then they have children themselves and remain coming”* (IP.A/G), just like young mother G19 who *“grew up in Domburg”* (also G39,G49,G69) and 58-year-old G72 who *“always spent holidays here 50 years ago. As a child. [...] ‘I’m on old paths’, one could say. How everything has changed, because in the path we could only go via the bridge to Zierikzee, this dike wasn’t there yet, you know? That’s of course interesting.”* ZV.B/D described it as follows:

ZV.B/D: *“[T]hey want to ‘bring’ their own experiences to their children. Those are stories like: ‘I’ve been to Zeeland with my parents for thirty years and now I also want to show it to my own children.’ Such stories, that, indeed, that feeling of safety indeed... Yes... A feeling of safety and familiarity, you know what to expect.”*

### **Health Tourists**

Besides striking geographic and demographic characteristics that stood in connection with certain benefit patterns, other specific benefits stood out by themselves, for instance those related to health: Guests connected to their holidays with the *“fresh”* (G13,TI.C/M,G27,G35,G37, G43), *“clean”* (IP.E/Y) and *“always good”* (G45) **sea air** (13 G.i., 6 employees), especially when being asked about connection between their stay and wellness and health purposes. 6 G.i. and 5 E.i. even pointed it out as a main reason for coming. The beneficial effects of taking a walk outside and breathing the sea air ranged, with flowing transitions, from the support of **wellbeing** (9/10 G.i. who mentioned wellbeing in overall) and a form of *“outdoor-wellness”* (IP.D/Z; also G13,G25, G29), to **general health** or even **specific medical health**. As G26 summed it up: *“Sea air is wellness and health”* (G26). Guests described the sea air as generally *“benefitting”* (G17; also G3,G25,G29), for instance *“for the general wellbeing”* (G3), *“for one’s psyche and also for the body”* (G17), but also more specifically for the **recovery** like from a stressful job or urban life (G3,G10,G29,G37):

G3: *“You have the feeling that when you drive home now, you did something good for yourself this weekend.”*

More specifically, sea air was also connected with better sleep (G51/53), recovery from a cold (G10,G50), allergy issues (G10), maintaining health in the future (G29), and for G67 and IP.H/S in detail with a beneficial air composition for iodine insufficiency or asthma:

G67 (coming to the coast of Breskens since 1978): *„[M]y oldest daughter was born without a thyroid and for her, the iodine-rich air here was important, and we only had a flat and here the children could go out. And the air, the iodine-rich air, in terms of health, was good for her.”*

IP.H/S: *"I also worked for Roompot, ehm, I was sitting in Cadzand and then there were often guests coming with asthma for... well, also really for the sea air because then they had better breathing, a bit more, ehm... probably because of the salty air..."*

Notably, those respondents who connected sea air seriously with health instead of "only" a good feeling seemed to assign high to critical importance to this benefit for their decision of coming to Zeeland (G3/4,G10,G20/21,G29,G43/44,G67/68). However, respondents from Cadzand-Bad and Domburg, who indicated interest in or issues with health (G3/4,G10,G12/13), denied any influence of the **health resort** status on their holidays, though did G12 show himself disappointed about the information that making a real 'Kur' was not possible in Domburg. Rather in contrast, mentioning the plans about building a Thalasso centre in Cadzand-Bad made G4 mention *"another point of criticism, [...namely...] that these huge houses got built, there along the beach line. Because that I also find so special here, that one can walk along the water without having to look at these constructions"* (G4).

Indeed, respondents who enjoyed the sea air valued walking or hiking activities (10 G.i., 4 E.i.), yet did a firm need into real **wellness facilities** appear low: On the one hand, an affinity of Germans for spa visits was confirmed by TI.A/G, TI.C/M, and IP.D/Z, TI.C/M saying that the hotel spas like at Van der Val and de Parel *"indeed really attract[...] German guests, that I know a 100%"* (TI.C/M), but on the other hand, only for weekend guests G3/4 and kite surfer G42, a spa was really a **necessary** facility for the chosen accommodation. Similarly, the *"one or two apartments with a sauna"* (ZV.B/D) at Zeeland Vakantie were said to cover the sporadic demand (ZV.B/D) and there were *"never"* (IP.A/G) or *"very few"* (TI.C/M, also IP.F/R) requests for spas at tourism information offices. Indeed, it rather applied to the interviewed guests that if a spa offer was given (like some of them had access to a sauna), they *"would make use of it, but that this was not pivotal. So, we don't come here for doing wellness holidays but for the nature"* (G2; 7 G.i., 1 E.i.). Using wellness facilities was also made dependent on more visible promotion of it (G17,G58,G71), having enough time left (weekend guest G35), 'feeling like it' (G37), being independent from children (G42,G62), as well as on a reasonable size (G58). Ideas about a quality and sufficiently big facility indeed differed: G4 was satisfied with *"three saunas, a small pool, [and] a relaxation room"* in his hotel – *"those are the small things where one can increase quality, where one can go into the niche"* (G4) –, holiday house users G17/18 and G58 contemplated about a thermal bath:

G58: *"I really support that, I'm an absolute fan of thermal baths, but I've never seen a thermal bath here, or something like that. Also, this one sauna that this one park offered once is not what we know from Germany."*

In line with this is IP.D/Z's opinion who mentioned about wellness tourism, that Zeeland *"does not have capacities there, at this moment"*, agreeing also with the researcher's assumption that this might reason the low number of spa tourists in Zeeland yet who rather *"go elsewhere"* (IP.D/Z). Taking a last look at medical tourism in Zeeland, TI.C/M and IP.D/Z both reported in view of **accessibility and medical care**, that *"a lot of people with disabilities"* (TI.C/M) tend to come in groups with organisations in the shoulder seasons but are *"not much seen"* (TI.C/M) in low season. Only IP.F/R reported that there are *"sometimes"* (IP.F/R) some requests for beach wheelchairs. Also, *"in the past, [...Roompot...] had built houses in Renesse specifically for people in wheelchairs, disabilities and something like that, but that did not really get off the ground [...], they are used as holiday houses for everybody now, [...] I think like 15 years ago. [...] I think that there is a need [...but...] I don't know why it's not that good yet"* (IP.D/Z).



## **Campers**

Whereas facilities for medical tourism seemingly did not earn much attention, camping facilities in winter did: From nine interviewed guests it was known that they **camp**, coming either with their own caravan or camper, or using (or owning) a mobile home. Some connected camping passionately with the freeness of “*simply driving off*” (G72) and more spontaneous planning (G71/72), a “*spleen*” (G29), or with a community (G23). Guests and employees reported, that many campsites are closed in low season, in specific mini-campsites needed to do so due to regulations (G22/23,G40,G41,IP.F/R,IP.H/S), though did both of them also talk about existing if not even increasing demand in low season. IP.F/R owns a campsite on Schouwen-Duiveland and reasoned plans of expansion by 55 more winter pitches as follows:

IP.F/R: “*So, ‘cause I noticed also extremely during the winter holidays here that really a lot of people were searching for a place to camp, [...] and nearly don’t find anything here in Renesse anymore [...]. [A]nd people with campers [...], they bring everything themselves, they, you know, they don’t need any further facilities, they just want to surf or want to, want to do something, [...] those people who come and camp in winter, they do indeed exist, you also have them quite a lot, especially, in particular now also during the Christmas holidays [...].*”

As IP.F/R did already indicate, there was a combined demand of camping and **water sports** in low season, observable in water sportsmen G40, G41, and G22/23. Also, TI.C/M noted:

TI.C/M: “*I also get continuously more campers, also German guests with caravans, an enormous number, and they surf. [...They ask...] where they can stand in the evening or where they can park with their camper [...]. More than in the past. Those are older but also younger people.*”

G40 and G41 from NRW, however, merely stayed for a day as “*only few places are available*” (G40) at campsites which are perceived **expensive**. Diver G23 shared his opinion, that “[...] *if the province wants to have more tourists in winter, then the camping factor is a big one. There are for sure many who would like to come with the caravans or with a camper for staying here a few days [...] when it’s just a bit calmer.*” However, some campers seemed to feel a bit ousted and arbitrarily treated in Zeeland’s tourism industry, for instance due to an increasing focus on gaining income by holiday houses (G34/35,G58/59,G68/69). Currently, for instance, caravan owners in Breskens who need to make space for holiday houses “*all search for new pitches to stay*” (IP.H/S), wherefore G67/68 now leave the province and mini-campsites try to use the new demand for obtaining permission to open in low-season (IP.H/S). The increasing development of the tourism industry with focus on quantity and more luxury accommodations was subject to quite some criticism and brought into connection with a loss of naturalness in the holiday experience (G34) and of the pristine coastal environment (G3,G34/35, G56/G57,G58/G59).

G34:“*The question is about how you want to develop, whether you want to adapt it a bit to the landscape or whether you put something like over there, [this new bungalow park on Noord Beveland,] the [...] grey concrete blocks that are standing in the dunes*” (G34).

G23 and G39 also appreciated the coastal protection and renaturation that had been done years ago. Another point of concern was the rising **price** (G8,G34/35,G56/57, G58/59) that is already perceived high (7 G.i.). For some, this soon appears becoming unaffordable:

G35: *“I mean, families with children somewhen cannot afford that anymore [...and...] common camping is getting less and less, right? [...] One must also once think about the other social layers, they also just want to continue going on a normal campsite, you know?”*

### **Water and beach sport hobbies**

At last, the water sports enthusiasts gained attention with their specific benefits: *“[S]ports is a big factor here. Meaning surfing, sailing, and diving.”* (G23) Indeed, certain respondents (G22/23,G40,G41,G42, G45) came to Zeeland for doing water sports, such as **diving, sailing** (G22/23), blow karting, **kitesurfing** (G42,G45), or **windsurfing** (G40,G41), whereby G40, G41 and G42 came exclusively for this reason and stayed for only one (G40,G41) or two (G42) days. All of them valued the **vicinity to their place of residence** in southern NRW. As mentioned, staying for more than a day was also rather unattractive for G40 and G41 due to few offers and high costs at campsites. As G40 and G41 explained (also 3 E.i.), the **wind** conditions at Grevelingenmeer were the best for **windsurfing** close to their home and the main decision factor for a trip to Zeeland on short notice, also at the sea for kite surfer G42:

G42: *„Well this is... one of the biggest kitesurfing spots in Europe [...], I think even worldwide and that’s why I come here, yes. There, there are restaurants, toilets, you can switch clothes and shower inside, it’s a bit the entire layout... Yes, there is everything you need.”*

IP.D/Z described surfers as *“a distinct group”* (IP.D/Z), TI.F/R adding that *“people doing water sports in winter, those are anyway the real ‘die-hards’, let’s say, and those are really people who are already coming for years [...and who are...] experienced”, “the freaks”* (G42) who come with good and own equipment (IP.F/R,G23,observation). Cold weather was mentioned as the main reason for not sporting (G40,G22,G42) and leaving the waters to the (much more seen) Dutch sportsmen (G40). Respondents’ age ranged from 36 (G42) to 60 years (G23,G60,G61) and also IP.D/Z talked about an age span up to 50 and above. Besides the surfers, part of an entire community of **divers** were G22 and G23 who visit diving spots at the Oosterschelde and the Grevelingenmeer. *„There are videographers and photographers, biologists, there are also many many insiders and one knows each other”* (G23), but also more tourists who come for fun but also research, observing the lively and colourful underwater world with its riff-like overgrown bridge pillars and interesting water animals that partly come from Mediterranean waters.

G23: *“[T]hat’s a super interesting area here. A bit exhausting, but besides that a challenge.”*

Diving time starts, according to G23, with the mating season in the beginning of February. Over the past decades, a lot has been done for divers and diving infrastructure has been improved, but *“[a]ccordingly is of course also the diving tourism here, so... throughout Europe a very known diving area here....”* (G23). One last noted *“really separate group of people”* (IP.F/R) were **fishermen** (2 G.i., 2 E.i.). Fishing in Zeeland can be done for free in the North Sea and in the Westerschelde, whereas a permit is needed for inland waters. However, statements regarding low season remained vague: *“Ehm... no, yes...[...] it’s not that in winter we sell much more fishing permits, that’s really from Eastern on, let’s say, from March, then it starts running a bit...”* (IP.F/R) and *“now and then, we have indeed Germans who come for a fishing permit, asking also for the entire year, and then you notice that those are people who have a caravan or something like that [...]. Yeah, but it’s not the ... the biggest group, let’s say. [...] but I think that fishing, yes they always stand there [in Cadzand-Bad] in winter for fishing (laughing).”* (IP.H/S; also observed by G3/4). (For more interview results with less relevance for the research, see [Appendix I.](#))

## 6. Discussion

Certain groups of benefit combinations (compare Haley, 1968) seemed to depict market segments, at least within the 'market' of randomly selected interview respondents in this research. Independent from their individual characteristics and travel features, the pivotal reason for visiting Zeeland in low season among respondents and German low season guests in overall (as reported by employees) was the seaside. Thus, the seaside appeared to be the core benefit and intersection where several potential markets overlap with each other (compare Chung et al., 2004; Haley, 1968), as well as the most impact-having benefit on the first three stages of Mathieson and Wall's (1982) 'Travel-buying behaviour' model, including the destination choice. Other frequently shared and strong benefits sought seemed to be, for instance, low season's inherent tranquillity and the vicinity of the sea to the own place of living. Besides that, the relative importance that is assigned to benefits and helps distinguishing segments (compare Haley, 1968) appeared visible in the other tangible and intangible reasons that got connected to or seen as an addition to enjoying the seaside. For instance, some guests came to the coast for pure recuperation and others for doing water sports. This observation in mind, the following potential segments are discussed in view of their criteria of being a quality segment, a niche market, and having the ability of attracting more German tourists to Zeeland during low season.

### *Low season tourists meeting many criteria of a quality tourists*

Quality guests are those allowing geographic and temporal distribution, who love, appreciate, and support Zeeland's identity, bring income, and become loyal fans (A. Woudstra & M. van den Berg, personal communication, September 24, 2019). Most interviewed but also other low season tourists indeed appeared and were reported to be loyal and very frequently returning guests who perceive the undisturbed experience of Zeeland's identity at least in terms of coastal and spacious nature and 'laid-back' atmosphere as an *important benefit*, but they also valued locals' mentality and the urban surroundings in their overall smallness, cosiness, and Dutch style. Mass tourism was often rejected and, instead, the benefit of enjoying tranquillity was assigned critically high importance for holidays (compare Haley, 1968). Thus, the tourists apparently shared the same benefit with many locals who live at destinations with high seasonality, namely the use of a timeout (compare Mathieson & Wall as cited in Cannas, 2012) which also matches the aim of several respondents to relax, escape, and enhance their overall wellbeing. Also, low season tourists were maybe no eco-tourists but the importance of enjoying natural coastal landscapes and the criticism about ongoing constructions indicated the high valuation of Zeeland's intrinsic rusticity and naturalness. Butler (2014) already named the threat for vegetation as a typical negative side-effect of high season. Considering the advantage of naturalness that Zeeland is said to have over the Belgian coast, the question may arise whether the increasing effort in exploiting high season might affect important competitive benefits and related chances in low season tourism on a long-run. Regarding other characteristics of quality tourism, the salient activities of hiking and cycling alone are however no major income-bringing activities. As Butler (2014) stated, expenditures are especially important in low season due to economic threats like the reduced income source exploitation.

### *Long stay as an important criterium for quality tourism*

In this point, longer stays seemed to take over a critical role: Those respondents staying 3 nights and more tended to use their additional time for focusing also on other travel benefits of less assigned importance (compare Haley, 1968), meaning benefits sought that were not the primary reason to come to Zeeland. These tourists went beyond the enjoyment of seaside-related products and the main infrastructures of eating and shopping by also exploring more fields like culture and events (if offered),

thereby getting more involved with Zeeland's identity from a *cultural perspective* and, possibly, spending more on products and service fees. Guests with a longer stay came foremost from the more distanced and southern federal states Hesse and Rhineland-Palatinate, evoking the impression that holidays were also made worth their travel time by adapting length of stay. Markets outside of NRW are though not targeted by the VVV Zeeland yet, wherefore it might be assumed, that enlarging the radius of the targeted area in Germany for low season beyond the borders of NRW might not only go along with a rise in guest numbers, but eventually also in length of stay and activity level among these. Demographic characteristics of guests would though not change but still comprise people aged 50 and above without family obligations, as well as young parents with children under school-age. However, both belonged to the more active tourist groups by focusing on cultural and / or fun activities.

Whether this group also fulfils Dalgic & Leeuw's (1994) niche market criterium of being neglected by competitors may be doubted, yet did the benefit of visiting the sea by the lowest travel effort possible appear having a strong causal and thus competitive power on the destination selection (compare Chung et al., 2004; Haley, 1968) in the travel decision phase (compare Mathieson & Wall, 1982). Maybe therefore, as assumed by TI.C/ and IP.F/Z, more northern living Germans also make increasingly use of the manifold options at other coastal destinations (or G11 from the Italian coast), representing a strong competition for Zeeland 'by nature'. Another possible threat for attracting northern markets might therefore also be the decreased maximum velocity on highways to 100 km/h since March 2020, prolonging driving time to Zeeland's coast the more northwards a German area is. The assumed impact of destination vicinity on destination choice might, however, also be a financial advantage since potential tourists with a very short travel time might need less additional marketing efforts than others.

#### *Communication as a mean to more effective income source exploitation*

However, the higher *profitability* of longer staying guests may not be taken for granted or sufficient to render opening times of local providers profitable. Considering Butler (2014) who said that improved attractiveness of existent tourism products is the mean for enlarging markets in low season, there is also room for improvement in Zeeland for turning guests into repeat-visitors and stimulating word-of-mouth. TI.C/M was supported by other employees in the aspect that the variety of offers in Zeeland must be well visible, 'findable best at first glance' as interviewed guests expressed it. Indeed, in the 'Travel-buying behaviour' model by Mathieson and Wall (1982), it must be considered that information search behaviour seems to take place also during the travel experience phase and apparently deals with sought benefits of lower relative importance, determining what people do on-site once their main benefits have been obtained (compare Haley, 1968). Many respondents yet seemed to prefer obtaining information the most 'comfortable' way and being more proposed what to do rather than searching themselves, especially when length of stay is limited and no specific plans have been made. Assuming that secondary benefits might gain more interest once the main benefits have been obtained, more pro-active information offering on-site (without 'ad-spamming') for compensating the low active search behaviour may be required. Furthermore, since low visitor numbers and the resulting tranquillity were the most important selling points of low season itself, spreading people also over the place appears critical for keeping also future low seasons with increased visitor numbers sufficiently calm.

Another point to improve was seen on the provider level: Respondents showed broad understanding for restricted opening times of premises for seasonality-induced reasons as also Butler (2014) described them, though was efficiency for guests and providers also perceived improvable by taking low season tourism more seriously. Sutcliffe & Sinclair (1980) stated, that low season typically causes inefficient

facility and resource usage, though did also Baum & Hagan (1999) mention, that also provider's inability or unwillingness to offer attractive tourism products can be a barrier for effective low season exploitation. Seen in context of respondents' narratives, also in Zeeland, low season could be exploited more by entrepreneurs if guests' needs and information search behaviour were understood and taken as a chance to use more income possibilities. IP.D/Z added, that this also includes paying more attention to formal holidays in low season that, as Butler (2014) noted, can briefly cause increased tourist flows.

#### *Winter holidays as a profitable interruptive season*

However, a diversity of benefits sought seemed already to be well addressed by Zeeland's manifold and quality infrastructure for families. Special commitment to fulfil children's needs for activity and exploration (like entertainment offers at parks and indoor-playgrounds) appeared observable among interviewed parents and grandparents and is in line with findings from Gitelson and Kerstetter (1990) who observed this also in their research about the influence of different travel parties on benefits sought. According to narratives from employees, good holiday memories and familiarity might also influence later travel behaviour of people when having family commitments themselves, making them to loyal guests who return to Zeeland maybe for the felt obligation to offer positive experiences and a safe surrounding to their own children (compare Backer, 1960; Weissbrod, 2005). Beyond that, exploring is not only a preferred characteristic of quality tourists, but it might also be connected to higher expenditures. Families with children under school age therefore seem to remain an important target group for low season. Moreover, the assumption by A. Woudstra (personal communication, September 13, 2019) that Germans tend to travel with more remote relatives could not be observed, yet did families with schoolchildren show potential to be benefited from more: Targeting federal states that have winter holidays apparently form a small interruptive season in the month of February (compare Butler, 2001; 2014) and a niche sub-segment within the big segment of families (Kotler and Michaelson, as cited by Parrish, Cassill & Oxenham, 2006). As these can fall together with Dutch spring break, inefficient facility and resource usage of suppliers and providers could be reduced by higher occupancy (compare Sutcliffe & Sinclair, 1980) while at the same time, family's needs, as G60-65 experienced it, can be well addressed by the increased service range. Interviewed parents also notably highlighted their satisfaction with the child-friendly infrastructure in Zeeland, some even mentioning this as an advantage above Germany and other flight destinations. Thus, the two niche criteria of profitability and competitive superiority appear to be met (compare Dalgic & Leeuw, 1994) and positive holiday assessments might favourably influence future holiday decisions (compare Mathison & Wall, 1982, p. 28). Still, advertisement on-site may remain important for avoiding parents to stay on the parks only.

#### *The old-new concept of health tourism by nature tourism*

Furthermore, health tourists are assumed by the provincial authority Provincie Zeeland (2016b) to be an attractable market thanks to Zeeland's appealing natural environment. Yet, according to A. Woudstra (personal communication, April 06, 2020), the focus lies more on what the UNWTO and ETC (2018) define as preventatively acting wellness tourists than on reactive medical medical tourists. Although two places acquired the status of a health resort in 2014 (Timmermans, Marijs, Bijl, & Tempelman, 2016) Zeeland shall not be a 'destination for the ill'. Both types of tourism were though found to be existent in Zeeland: Wellness and medical health both belonged to those intangible benefits that were assigned high or highest importance in travel purpose by a notable number of respondents (compare Haley, 1968), hence health was a, or the, primary motivation to visit Zeeland and hence indicated health tourism (compare WTO/ETC, 2018).

Still, it was rather wellness tourism with preventative intentions for maintaining health and obtaining other benefits like relaxation, escapism, and general wellbeing that stood out. A few overall glimpses into some respondents' private lives hinted, that the need for wellness by destressing was very strong for some (compare Haley, 1968). Considering that tranquillity was the most important benefit for visiting Zeeland during low-season, it may be assumed that low season is especially suitable for balancing life domains (physical, mental, occupational, etc.) which was defined as the core of wellness tourism by the UNWTO and ETC (2018). How much the purpose of better health was also mirrored in guests' lifestyle on holidays cannot be said by this research. According to Timmermans et al. (2016) at least, enjoyment and 'let sin be sin' among tourists in Zeeland was prevailing. Among wellness tourists, the benefit of 'health' might thus rather be seen on the mind- than on the physical level.

In contrast, asthma, atyreosis, a cold, and allergic reactions were examples of medical tourism. The boundaries between both types sometimes remained fluent (as also noted by Smith & Puczkó, 2014, p. 27), yet was fresh sea air the benefit that connected them and made both medical, as well as many wellness tourists from the sample, come to Zeeland. Thus, the walk along the beach while enjoying the fresh sea air was the dominating core *tangible* benefit of the potential health tourism segment that seemed to profit from diverse and as important perceived *intangible* benefits (compare Haley, 1968), be they resting and overall better health, better sleep, symptom relieve of smaller or more severe respiratory diseases, or iodine-intake. Indeed, better sleep was proven in a research by Ratcliffe (2015) at the British coast to be a significant benefit of walks along the coast.

Independent from the type of health tourist, it was salient that enjoying Zeeland's seaside and the sea air by walking or hiking appeared sufficient for most for fulfilling the need for wellness or medical health. Although interest into wellness tourism by Germans in form of spa tourism was confirmed by some employees, demand for wellness facilities in Zeeland was observed to be low or the offer more perceived as a benefit of no high importance (compare Haley, 1968) yet representing 'a nice extra' that would be used under certain conditions. Health tourism tradition and growing potential (BMW, n.d.) might though also be the reason why some respondents' ideas or expectations about the size of a good spa (i.e. a "Therme") surpassed the current supply in Zeeland. Wellness tourism was indicated to be offered in different dimensions in Germany and indicated that expectations in wellness (spa) tourism can be met on very different levels. Reflecting this on respondents' core benefit of staying at the seaside and inhaling the sea air for wellness or medical health, the high appreciation of Zeeland's natural surroundings and the criticism about ongoing constructions, and the low active request for wellness facilities which were rather seen as a nice but mostly not "pivotal" (G2) offer, it might be drawn the conclusion that offering spa offering facilities for German guests like those in the sample can be an income-bringing unique selling point (USP) for accommodation providers (compare Timmermans et al., 2016), yet might the development of a massive spa infrastructure, that is to the detriment of nature, possibly be counterproductive to the purpose itself. As G34 stated: "*The question is about how you want to develop, whether you want to adapt it a bit to the landscape [...]*". In terms of competitiveness, Zeeland might at least not be unchallenged with offering spa facilities at the North Sea for targeting the possible niche of wellness tourists on the spa-level. What seemed to shine through in respondents' answers and was supported in a reflective e-mail conversation with C. Versprille from the Inspiration Point Cadzand-Bad (personal communication, May 12, 2020), Zeeland may already have the image of a 'healthy region' and the current type of guest does rather not appreciate the development towards a pricy and luxury destination that indicates a switch to a new target group of high-end guests. Since price increase may not only affect tourism products but also products of everyday life, including real estate,

Butler's (2014) recommendation to involve locals into decision-makings regarding season extensions appears advisable, also for maintaining positive awareness of tourism (compare Doxey, as cited by Cannas, 2012).

In overall, the discussion about whether and to what extent to target wellness tourism as a sub-form of the overall niche of health tourism (compare UNWTO/ETC, 2018) may finish by reflecting on the current low season tourist who seems to fulfil quality criteria: Kotler et al. (2013, p.105) and Parrish et al. (2006) stressed, that market research and customer intelligence superiority towards competitors is even more crucial for targeting niches than for normal market segments. This might support the impression, that further targeting the apparently already existing, well-known, and quality-criteria wellness tourist by promoting intrinsic assets (as also recommended by Timmermans et al., 2016) and offering small-scale spa facilities may be more controllable and sustainable for Zeeland's identity than tapping unknown luxury markets that might oust the existing one and might also be targeted by other coastal destinations.

Shifting the view to medical tourism, it should be considered that according infrastructure in Zeeland was described as barely developed and uncompetitive by Timmermans et al. (2016) in 2016 and seemingly barely found demand according to employees. Further industry research revealed, that only dialysis offers by Roompot Care is used by German guests (Roompot Care, personal communication, December 18, 2020) whereas care hotels and nursing care are barely requested (Sharon Lukasse – van de Guchte / Zorgstroom, personal communication, April 28, 2020; Buurtzorg team Middelburg, personal communication, May 08, 2020). Medical tourists from this research did not need such facilities either but only Zeeland's sea air. Coming with relatively light impairments like asthma, insomnia, a cold, and allergies, they may still suit and even support the desired image of the province as a healthy region that is not too medical. Furthermore, the few statements about the recognition of the health resort label discourage the formulation of an idea about its perception within the German market. The critical importance that got assigned to the benefit of sea air for people with medical interests though appeared to play a role in the travel-decision (compare Chung et al., 2004; Haley, 1968; Mathieson & Wall, 1982, p. 28) and could represent a niche in terms of size and less competitive distance to other health resorts at the German North and Baltic sea (compare Dalgic & Leeuw, 1994; Schuh, 2004, pp. 134-138).

### *Campers*

An already mentioned challenge of low season is that, if demand was given, serving this demand must also go along with efficient facility and resource usage (Sutcliffe & Sinclair, 1980). Campers are for themselves no niche tourists in Zeeland, yet are many campsites closed in low season but demand for winter camping was reported to be given and growing. One campsite provider seemed to see the opportunity in the independence of those coming with campers as self-catering guests to make more profitable use of the growing demand. Being equipped with necessary household tools, it might be assumed that campers in winter get along with the same facilities as locals but may, as tourists, also use more additional leisure infrastructures (so far open) that was used by guests from the sample, i.e. premises to eat and drink outside, diverse shopping options, but also museums and other attractions. Thus, by addressing a segment with reduced tourist needs but usual tourist behaviour, a contribution to tackling what Baum and Hagan (1999) described metaphorically 'the chicken and egg dilemma' could be made and what was also seen oppositely by employees, i.e. whether the first incentive for opening up low season must come from the tourist or from the provider side. However, also tourists living in holiday houses are self-catering guests and gaining increasing focus by entrepreneurs such as campsite owners, reported to be partly leading to a displacement of campers. In this point, similar considerations as with

the type of wellness tourist arise, i.e. which target market should be attracted up to which luxury level while ensuring control over quality tourism. Still, suitable markets only remain those that are also *able* to buy a product (compare Verhage, 2010, p. 230) yet price was described as a matter of concern not only among the respondents, but also in the latest marketing report of VVV Zeeland's Department of Marketing (2018a). Higher product pricing, as it is a possible side benefit of niches (Kotler et al., 2013, p.105), may thus not apply to the normal camper when being attracted during low season.

#### *Water sports enthusiasts*

Price and closed campsites also influenced the length of stay of two interviewed windsurfers who just came for a day. Doing water sports in Zeeland's waters with highly competitive sporting conditions and a relatively short travel time was usually the most important benefit for coming to Zeeland among the interviewed sportsmen, thus possibly having a strong causal power on the destination selection in the travel decision phase (compare Chung et al., 2004; Haley, 1968; Mathieson & Wall, 1982). The facetious description of these people by IP.F/R's as "die-hards" and G42 as "freaks" seem to underline the power of water sports as a benefit which is also a passionate hobby (compare Stebbins, 1982). Considering that hobbies are activities that are usually conducted in temporal regularity (Oxford University Press, 2019), profitability might be assumed. However, the interviewed sportsmen often had a very short stay of only one or two days and brought equipment themselves. Barely having spendings on-site but long car-rides, they contradict the profitability of a niche market (compare Dalgic & Leeuw, 1994) and the image of a quality, more sustainable, and beneficial market for local communities (compare Hall & Weiler and Hall & Lew as cited in Robinson and Novelli, 2005; Robinson & Novelli, 2005). However, as TI.C/M and the interviewed sportsmen indicated, camping and water sports can be connected benefits of one segment (compare Chung et al., 2004; Haley, 1968), meaning that better priced and open campsites might also increase length of stay and spending of this small appearing market. At last, closer assumptions of whether fishermen form a niche market or not may not be made due to only vague statements about these. Merely may the perceived suitability of calm low seasons for them appear reasonable.

#### *The meaningfulness of niches for low season*

At last, there were other less known and rather inconspicuous groups of respondents of specific interests, namely delta-related topics, World War II, and special events like Straô-riding and Sinterklaas. Considering the aspect of sufficient profitability and chances to grow (Dalgic & Leeuw, 1994; Kotler et al., 2013, p. 105), especially the first two of them seemed interesting: On the one hand, respondents with maritime interests formed a benefit cluster of sights that belong to Zeeland's identity as a 'land on sea', namely harbours, ships, and the Delta Works. Especially for families, boat trips were apparently related to enjoyment for the children whereas the reason for more serious interest into maritime attractions (except for G26) remained unknown. On the other hand, respondents showed interest into World War II monuments, presumably due to their involvement in this part of history as Germans which may increase the valence and involvement with this topic (compare Schiefele, 1991). Yet, certain restraint in showing this interest towards the Dutch employees seemed given and cannot be explained by literature from this research wherefore the researcher herself leaves it to an unverified and non-valid comment that shame and fear to behave inappropriately seemed to be observable among respondents in this respect. In overall, these interests could indeed be niches as they are small, addressed by USPs, and have potential to drive income from tourists if given infrastructure like museums or guided tours are used (compare Dalgic & Leeuw, 1994). A certain increase in activeness at the destination was indeed observable (compare Schiefele, 1991), yet time restrictions and search behaviour seemed to act hinderingly again.



Neither were these interests reported to be decisive criteria for coming to Zeeland (compare Mathieson and Wall's, 1982) which lowers the relevance for the research question. Instead, these niches seemingly belonged to those benefits of low importance that are paid attention to once the main benefits have been obtained on-site. Chances may though be seen in the overlap of these maritime and history-related interests with the topics 'Nederland Waterland' and the 'Liberation Route' by which the NBTC already tries to drive specific interest tourism to Zeeland (compare NBTC, 2020), thereby providing a promotion structure for indeed tapping specific markets besides those who primarily come for the sea.

Still, considering that for most of the other described potential segments, it is debatable whether they fulfil all the criteria of a niche, be it the small market size (e.g. of tourists from other federal states), the profitability (e.g. of water sportsmen), or the neglect by competitors in overall if distance does not play a decisive role, it might be assumed that the true niches rather serve the profiling of the province towards other coastal destinations and have most impact on spreading people over place than over time. Consequently, it appears more important to consider which of the above-mentioned target groups, that visit Zeeland in the winter months, are most attractive in terms of quality criteria, i.e. geographic distribution, appreciation of Zeeland's identity, profitability, and loyalty.

## 7. Conclusion and Recommendations

The observations indicated that the pivotal and by all respondents shared benefits for visiting Zeeland in low season seem to be the unspoiled coastal nature with the seaside in combination with the vicinity to guests' place of living, as well as (for most respondents) low-season's inherent tranquillity. Low season tourists from this research appeared to be quality tourists in themselves who appreciate Zeeland's intrinsic identity in terms of nature, rusticity, locals' mentality, and "cosiness". However, one of the critical factors determining profitability appeared to be the length of stay: Spending more time at the destination seemed to inspire guests to search also for 'secondary benefits' that go beyond the seaside and the core infrastructure of accommodation, gastronomy, and shopping. They may thus be connected with the involvement with Zeeland's culture and more spending behaviour. Secondary benefits depended on the individual segment and may include guided tours, attractions, or museums especially regarding maritime topics and possibly also Word War II-related sights, but also attending an event or using spa facilities. Consequently, based on the statements of 72 interviewed guests and 8 employees, and considering Butler's (2014) six possible actions for mitigating mild tourism flows in low season, the idea got formulated that a qualitative lengthening of Zeeland's tourism season might be achieved most not necessarily by niche market targeting, but by attracting a geographically broadened market from the federal states of Hesse and Rhineland-Palatinate. As these are less attracted by other coastal destinations in terms of travel distance and seemingly opt for a longer length of stay for compensating travel time, they might have the capacity to enrich Zeeland's low season tourism in quantity and quality.

Segmenting this geographically extended market on benefits sought revealed five interesting potential segments with the belonging tangible and intangible benefits and demographic characteristics:

1. **Young families with children under school age** whose benefits sought circle around (age-appropriate) entertainment offers for children such as child animation, indoor-playgrounds, animals and attractions that bring fun and invite for exploration
2. **Health tourists**, including wellness and light medical tourists whose benefits sought circle around the seaside, fresh sea air, pristine natural surroundings, a good hiking infrastructure and possibly

the tranquillity that is inherent to low season itself; Spa facilities may constitute an extra benefit that is usually not pivotal for the travel itself

3. **Winter campers** whose benefits sought circle around open and affordable campsites; a sub-segment of these are water sportsmen whose benefits circle around the outstanding wind conditions, fascinating underwater world, and maybe silent surroundings for fishing
4. **Explorers by chance** whose benefits sought (though may these not always be assigned high importance and have effect on the destination choice) circle around the maritime topics in connection with ships, harbours, and the Delta Works, as well as the Liberation Route by Zeeland as it is also included in the Holland-City-Strategy by NBTC; These guests may seek for related sights, information facilities, and guided tours.

Another specific possible segment is defined by:

5. **Families with schoolchildren who come during winter holidays** in February. Their benefits are the same as those from segment (1) yet is the age group of children different which might go along with small adaptations in the details of benefits sought.

These holidays are only scheduled in some German federal states, one of them Rhineland-Palatinate yet only when Eastern falls late wherefore, in terms of geographic characteristics, also other close federal states like Saarland form attractive markets for the month of February. Furthermore, Butler (2014) stated that widening the market is dependent on an improvement of the attractiveness of existent tourism products. In this context, it is further concluded that profitability might be increased among the current and new market by more cost-efficient product offering and a more pro-active communication infrastructure from tourism providers and marketing organisations for supporting tourists in making use of secondary benefits which boosts geographic spreading and spending behaviour.

*The method as a suitable mean to find niches*

The research method itself appeared appropriate for finding niche markets due to the vast dominance of inductive codes over deductive codes in the final operationalisation ([see Appendix D](#)), indicating that a quantitative method would have missed the required depth of information that was gained by in-depth interviews. Furthermore, results were checked by the in-company supervisor and destination marketer A. Woudstra (personal communication, May 06, 2020) from the VVV Zeeland who confirmed most benefits to be known but surprises lay in the details of guests' responses. The tendencies towards a quantitative method in number and shortness of interviews with tourists may appear contradicting to the in-depth research instrument and was already partly discussed among the limitations. Yet, this method is still assessable as a strong one due to the explorative purpose of this research that enabled finding but also describing existent niche segments within the entire market including by means of a cluster of benefits sought. Furthermore, the intensive question-answer interaction and the photo elicitation increased the result density. The number of interviews helped to see benefit constructions of markets (Haley, 1968) and provided a starting idea about bigger and smaller patterns and, thus, the niche-potential of possible segments as well as the value of individual interests. At last, since main activities of German respondents were in line with the description of the German target market in the latest marketing report of the VVV Zeeland (VVV Zeeland, Department of Marketing, 2018a, p. 32), there is support for the validity of the spotted patterns.

## *Recommendations*

Based on the conclusions drawn from the research, the following recommendations are formulated for the VVV Zeeland for achieving a qualitative lengthening of the German tourism season in Zeeland:

Firstly, since the current low season guest seemingly has a good potential to fulfil the criteria of a quality tourist, it is recommended in terms of marketing efforts to remain focused on this market and enlarge it in quantity and length of stay. The latter is assumed to result in higher activity and spending behaviour, ensuring an economically more viable low season in Zeeland. Consequently, the main advice contains to enlarge the target group in low season geographically by the federal states of Rhineland-Palatinate and Hesse which seem to stay longer due to a prolonged travel time and can be addressed with the competitive advantage of vicinity and pristine coastal surroundings. Considering that the closest living guests appeared to stay the shortest, to be least active but also very loyal, it seems recommendable to more trust in the effect of travel time convenience and positive word-of-mouth and shift successively more financial focus from the very closest to the more geographically distanced markets. These may require more marketing effort yet may also be more profitable, also for businesses providing less used tourism infrastructure by the coast but also at any other place (compare VVV Zeeland, 2018a, p. 24).

Depending on the level of attractiveness (Verhage, 2010, p. 236), profitability, and chances to grow (Kotler et al., 2013, p. 105), the VVV Zeeland could focus within this existent market on the sub-segments of (1) young families since their needs can be met well by a number child-friendly facilities, their chances to return, but also due to the effect they may have on the maintenance and further development of family-friendly infrastructure in overall. The latter should also serve Dutch families, thereby making also Dutch families benefit from tourism (compare NBTC, 2019, p. 4) and attract more of them to the province that is struggling with population senescence (compare VVV Zeeland, 2018a, p. 22); (2) self-catering campers which apparently growing market can add to the quantity of guests that is needed for profitably offering more tourism infrastructure in winter; also, camping water sportsmen might stay overnight if price and offer make this worth it; (3) health tourists who come for staying in coastal nature and may be 'common tourists' yet appreciate and support Zeeland's intrinsic assets in terms of pristine nature; and (4) families with schoolchildren from federal states that schedule winter holidays (e.g. Saarland, and sporadically Rhineland-Palatinate) as these fall into the small interim season of Dutch spring break, increasing the profitability of February where the number of overnight guests is at the lowest (compare VVV Zeeland, 2018a, p. 8). For convincing these segments to come to Zeeland in low season, they should be targeted by their shared main benefits, i.e. the idyllic seaside landscapes as well as by their individual main benefits sought that have been worked out in this research. However, since this research was of very explorative nature and applied on a large market, further research on more in-depth information within the found potential segments is recommended where needed.

Secondly, for increasing all the segments' profitability during their stay, the observed tendency to reduced information search for secondary benefits should be tackled by more pro-active communication effort in form of "first-sight" and "first-click"-advertisement. Hence, more information must come to the guest than the guest to the information for knowing *that* there is something and *what* there is to do in Zeeland, using offline and online media also outside the seemingly not well-visited premises of the Inspiration Points. Zeeland's low name recognition in terms of cultural offers (compare VVV Zeeland, 2018a, p. 33) could be counteracted by that, too. Specific focus should thereby be put on maritime topic (including ships, harbours, and Zeeland's Deltaworks) in the Experience as well as the Planning Phase of the Customer Journey. This can serve profiling the province in its unique identity for addressing a

possible niche interest of German guests but also for supporting national sustainable tourism strategies for attracting explorer tourists. This is similar in terms of Zeeland's World War history, yet might attention have to be paid to possibly preferred unobtrusive search behaviour of Germans. This translates into the overall advice to further research about preferably used information tools at the destination itself for supporting tourists in exploring the province and spreading tourists geographically, thereby increasing the chance for locals to benefit from tourism at any time *and* at (mostly) any place (compare NBTC, 2019, pp. 4; VVV Zeeland, 2018a, p. 24). A first recommendation on the application on marketing techniques can be read in the Implementation Plan. Furthermore, special interest may also lie in how to spread tourists not only by day tourism but also by using accommodations that lie further away from the open sea, raising the question about possibly existing USPs.

The latter leads to the topic of wellness tourism, where small-scaled spa facilities might indeed bear the chance for differentiating from other providers. Not pivotal for coming yet appreciated by German respondents, inland-lying accommodations may obtain preferred allowance from authorities for offering spa-tourism that suits the province's natural identity to stand out more from suppliers at the coast. Besides that, Zeeland's seemingly well-developing image as a healthy region can be further outlined by the VVV towards the German guest by focusing communication on coastal landscapes but also healthy sea air – a highly appreciated benefit among respondents, also for medical reasons that still match the desired image. The health resort label may be advertised as a proof of quality for the latter. However, popularity and perception of this label among Germans could be subject of new research as perceived value and profitability should justify the expensive prolonging of the label in a few years.

Thirdly, also entrepreneurs and authorities can contribute to the enhancement of quality tourism in low season by reflecting on attractive and effective product offers and development: Accommodation providers should support longer stays by price incentives such as arrangements that support mid-week or shoulder days occupancy. Also, gastronomes should collaborate and effectively alternate their opening times for they can benefit evenly from the tourist and the tourist can benefit from more continuous service supply over the week. Effectivity of service provision can also be risen by paying attention to formal holidays in Germany that increase tourism flows and by communicating opening times more consistently on all offline and online channels. Furthermore, municipalities can support more camping tourism by loosening closing regulations for mini campsites.

In overall, all stakeholders, from DMOs, entrepreneurs, municipalities, to the province, and other organisations should work together on the same idea of making Zeeland remain an attractive and viable place to live and recreate all year-round (compare VVV Zeeland, 2018a, p. 24). The indicated increasing trend towards targeting luxury markets might though oust the quality market that is given and increase prices not only for tourists but also locals. Due to the latter, involving locals into decision-making for extending seasonality is recommended. Whether targeting high-end customers is a matter of necessity or opportunity should therefore be well considered and weighted with the unused chances that seem to lie in the given market. Finally, the VVV Zeeland can use its position as a marketing authority for communicating these recommendations and agreeing on well-aligned strategies for supporting more year-round quality tourism in Zeeland.

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## APPENDIX A –Models Considered for the Theory-Based Research Process

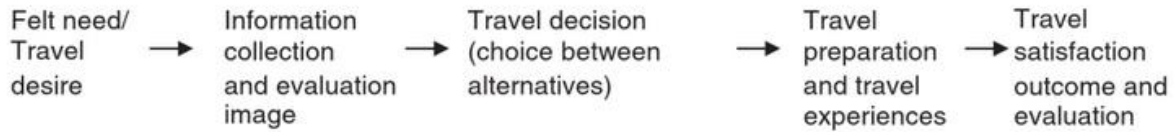


Figure 1. Travel-buying behaviour as adapted from Mathieson and Wall (1982). Reprinted from *Consumer behaviour in tourism* (p. 52), by S. Horner and J. Swarbrooke, 2016, New York, NY: Routledge. Copyright 2016 by Routledge.

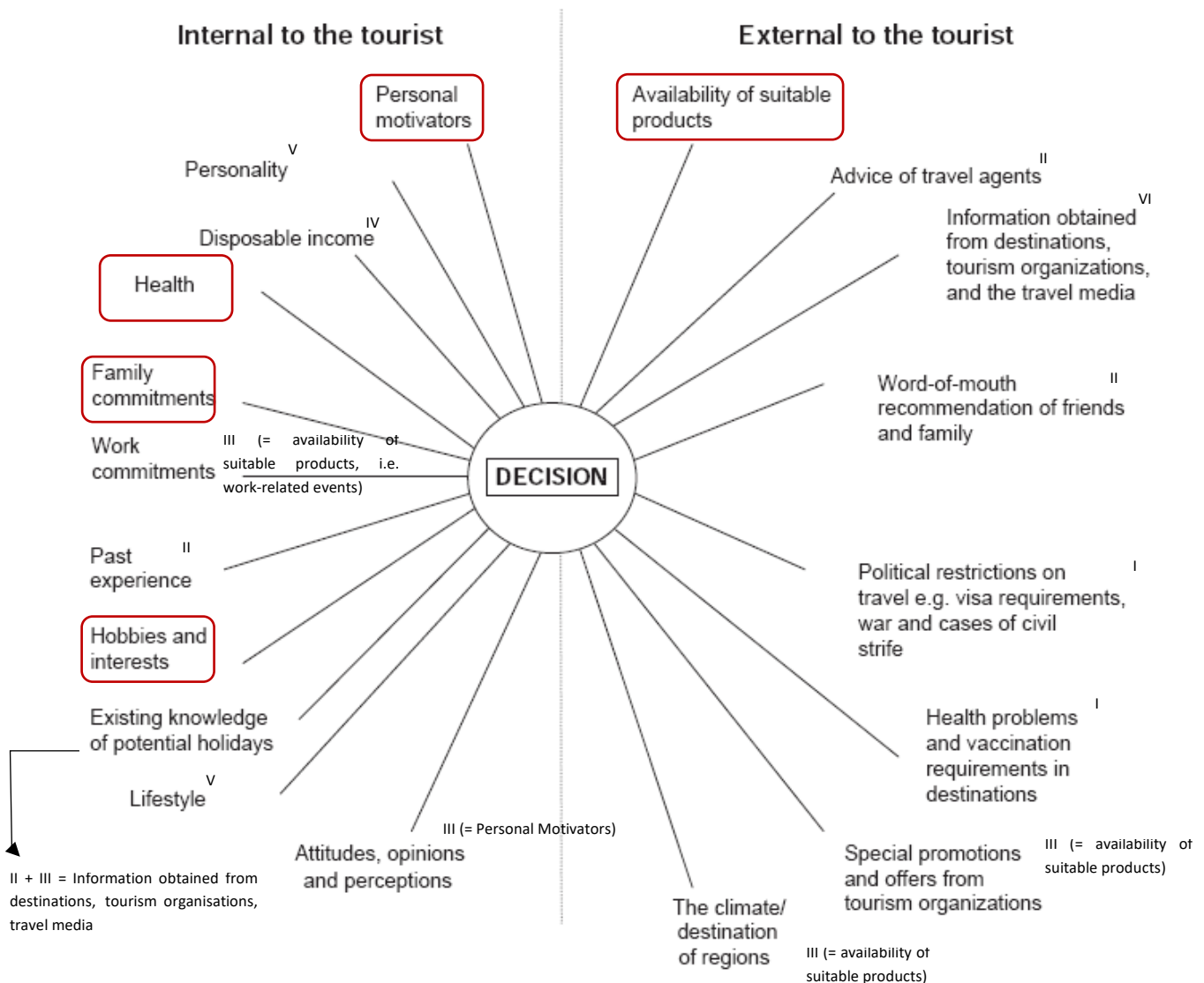


Figure 2. Factors influencing the holiday decision as adapted from Horner and Swarbrooke (1996). Adapted from *Consumer behaviour in tourism* (p. 114), by S. Horner and J. Swarbrooke, 2016, New York, NY: Routledge. Copyright 2016 by Routledge; Red boxes show factors examined in this research. Roman numerals refer to reasons for excluding factors from the examination: High safety and security of the travel destination (compare Auswärtiges Amt, 2019, September 22) <sup>I</sup>, lack of direct influence of the VVV Zeeland on the factor <sup>II</sup>, major overlapping with included factors of examination or factors that got excluded for other reasons <sup>III</sup>, reasons of courtesy as the interviews are spontaneous, short, and initiated by a profit-oriented company <sup>IV</sup>, necessity for extensive and complex additional research <sup>V</sup>, and consideration of that factor during the student's internship work <sup>VI</sup>

## APPENDIX B – Examined Literature on Benefits Segmentation

| Indirect Approach  |  |   |  |   |
|--|--|---|--|---|
| Sarigöllü & Huang (2005)   | Davis & Sternquist (1987)  | Woodside & Jacobs (1985)  | Johns & Gyimóthy (2002)  | Chung, Oh, Kim & Han (2004)   |
| Quantitative   | Quantitative   | Quantitative  | Quantitative   | Quantitative  |
| Frequency of Travel  | Tourist-Attracting Attributes = Facilities for Activities  | Travel Company  | Personal Values  | Front office attributes   |
| Travel Party   | Mode of Transportation   | Frequency of Visit  | Visitor Autonomy = Way of Arranging the Trip (e.g. agent, package, etc.)   | Food and beverage attributes  |
| Package Types  | Reasons for Visiting the Area  | Length of Stay  | Amenities Found on the Island, Vacation Activities, Attractions on the Island  | Atmospheric attributes  |
| Information Sources  | Travel Distance  | Used Contact for Obtaining Travel Info  | Party Size, Party Composition  | Demographics (Age, continent of origin, sex)  |
| Vacation Activities (rated by importance on Likert-scale)  | Length of Visit  | Island Visited, Cultural Attractions, Accommodations  | Sociodemographic (Country of Origin, Age, Gender)  | Reservation done by oneself / another person  |
| Other decision drivers (Infrastructure, local environment, services, costs) (rated by importance on Likert-scale)  | Number and Composition of Travel Party   | Experiences & Benefits Realised (post-trip)   |  |   |
| Personalities  | Expenditures   | Purpose of Trip   |  |   |
| Interests  | Demographics (Age, Family Income, Level of Education)  | Demographics (Age, Marital Status, Education Completed, Nationality)  |  |   |
| Demographics (Sex, Age, Education, Occupation, Household Income / Year)  | Frequency of Visiting Destination X  | Average Costs of Trip   |  |   |
|  | Frequency of Visiting other Destinations   | Other Destination choices Considered  |  |   |
| Direct Approach  |  |   |  |   |
| Gitelson & Kerstetter (1990)   | Kastenholz, Davis & Paul (1999)  | Jang & Cai (2002)   | Jang, Morrison & O'Leary (2002)  | Frochot & Morrison (2013)   |
| Qualitative / Quantitative   | Qualitative / Quantitative with open and closed questions  | Quantitative  | Quantitative   | Review on Previous Applications of Benefit Segmentation   |
| Purpose of Trip  | Frequency of holidays  | Socio-demographic (Age, Gender, Marital Status, Income, Party Size)   | Type of Trip   | Benefits: get away from everyday life/routine, be with friends, do something with the family, relax, develop my knowledge and abilities, experience something new, engage in physical activities/keep fit, be with others who enjoy the same thing, release tensions/stress, experience the tranquility/solitude, be outdoors/in nature, do something different, have fun, do exciting things, for interest in history, be entertained, for social recognition, learn about nature/wildlife, meet new people, do nothing, observe scenic beauty, experience new cultures/places, experience something authentic, for adventure, for own self-esteem/self development, |
| Season Visited   | Preferred Seasons for Holidays   | Package Tour  | Travel Expenditures  |   |
| Length of Stay   | Preferred Lodging Types  | Length of Trip  | Number of Person in Travel Party   |   |
| Section of State Visited   | Demographics: Place of Residence, Nationality, Age, Gender, Education Level, Occupation, Position in Family Life Cycle, etc.   | Activities  | Usage of Package Tours   |   |
| Sociodemographic (Age, Education, Gender, Income)  | Benefits of Visiting a Rural Area (qualitative): <b>Informed, well-priced Independent Travel</b> incl. ease in finding location or signposts / Independence or Flexibility / Price / Information; <b>Culture and Tradition</b> incl. Traditional way of life / Get to know culture and history / Architecture or monuments / Culture and folklore events / Get to know rural life / agriculture; <b>Social and Active Hedonism</b> incl. Entertainment or night life / Opportunities for socialising / Opportunities for families with children / Opportunities for sports; <b>Calm and Unpolluted Environment</b> incl. Peaceful or quiet atmosphere / unpolluted environment | Philosophy  | Destination Image  |   |
| Travel motivations (1st study round, qualitatively): <b>Relaxation</b> incl. relax / experience solitude / get away from it all / get recharged be able to do nothing / release tension / have privacy / escape from the routine / not have to rush, learn new things; <b>Excitement</b> incl. see interesting sights / explore new places / view scenery; <b>Excitement</b> incl. do exciting things / be entertained / do a specific activity / experience luxury / be in control; <b>Explorer</b> incl. visit friends / share a familiar place with others / return to a favourite vacation site / do something with the family; <b>Others</b> incl. eat good food / go shopping / meet new people / learn about yourself |  | Levels of Satisfaction  | Activities   |   |
|  |  | Travel Motivations: Visiting new places, increase knowledge, escape from the ordinary, meet new and different people, be together as a family, go to places friends haven't been yet, do nothing at all, best deal I could get, nice weather, value for money, primitive outdoor camping, Outdoor activities, driving on my own, arts & cultural attractions, exotic atmosphere | Information Sources  |   |
|  |  |   | Season of Trip   |   |
|  |  |   | Country visited  |   |
|  |  |   | Sociodemographic (Age, Gender, Marital Status, Education, Occupation, Income)  |   |
|  |  |   | Travel Companion   |   |
|  |  |   | Levels of Satisfaction   |   |
|  |  |   | Benefits Sought: <b>Nature and environment</b> incl. Environmental quality / air / water / soil / standards of hygiene and cleanliness / personal safety / nice weather / interesting rural countryside; <b>Knowledge and Entertainment</b> incl. having sth. to talk about / seeing sth. new / seeing sth. friends have not seen / increase knowledge / having fun; <b>History and Culture, Outdoor Activities</b> incl. activities / appreciate nature / see native groups; <b>Family and relaxation</b> incl. being together / doing sth. together / doing nothing a all / shopping / relaxing; <b>Escape</b> incl. escape from the ordinary / demands at home / busy job; <b>Value</b> incl. value for money / best offer / tourist info / scenery; <b>Lifestyle</b> incl. experiencing new lifestyle / simpler lifestyle / trying new foods |   |

Table 2. Examined literature on indirect and direct benefits segmentation, including research by Chung et al. (2004), Frochot & Morrison (2001), Davis & Sternquist (1987), Gitelson & Kerstetter (1990), Jang & Cai (2002), Jang et al. (2002), Johns & Gyimóthy (2002), Kastenholz et al. (1999), Sarigöllü & Huang (2005), Woodside & Jacobs (1995)

# APPENDIX C – Theory-Based Research Process

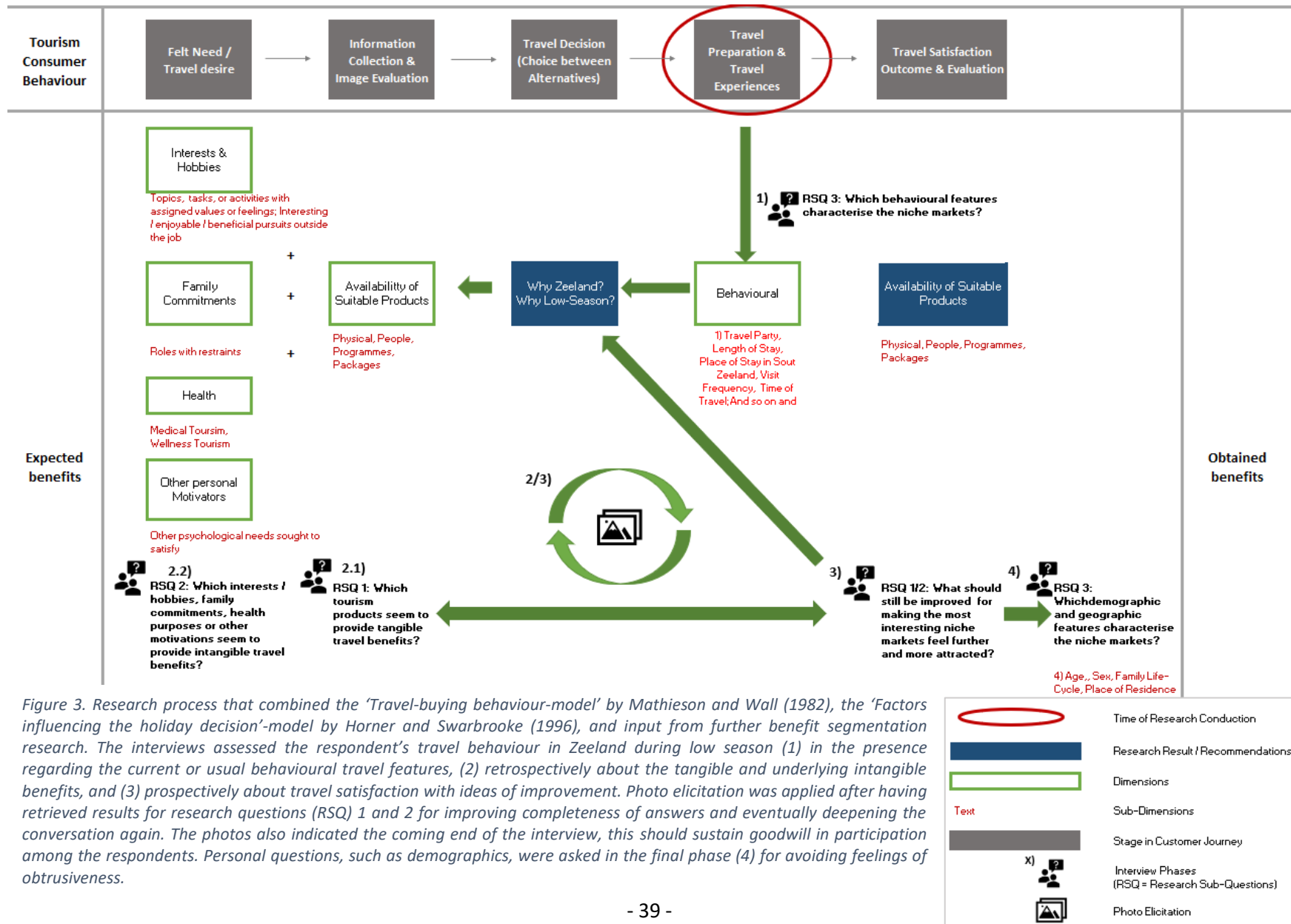


Figure 3. Research process that combined the 'Travel-buying behaviour-model' by Mathieson and Wall (1982), the 'Factors influencing the holiday decision'-model by Horner and Swarbrooke (1996), and input from further benefit segmentation research. The interviews assessed the respondent's travel behaviour in Zeeland during low season (1) in the presence regarding the current or usual behavioural travel features, (2) retrospectively about the tangible and underlying intangible benefits, and (3) prospectively about travel satisfaction with ideas of improvement. Photo elicitation was applied after having retrieved results for research questions (RSQ) 1 and 2 for improving completeness of answers and eventually deepening the conversation again. The photos also indicated the coming end of the interview, this should sustain goodwill in participation among the respondents. Personal questions, such as demographics, were asked in the final phase (4) for avoiding feelings of obtrusiveness.

APPENDIX D – Operationalisation

| Concept                  | Dimension                         | Sub-dimension     | Indicator   | Sub-Questions   | Sources  |
|--------------------------|-----------------------------------|-------------------|---|---|--|
| Tangible Benefits Sought | Availability of suitable products | Physical products | Good Weather, Wind, Seaside (and Lakes), (unspoiled) Nature*, Sea Air, Space, Vicinity to Home, Cycling Infrastructure, Hiking Infrastructure, General Infrastructure, Wellness Infrastructure*, Seaside Resort, Accessibility & Medical Care, Dog-Friendly Facilities, Campsite, Accommodation*, Open Fire Place, Entertainment Facilities for Children, Entertainment Facilities for Young Adults, Cities, Small Shops & Boutiques, Dutch Style (inner and outer architecture / city style), Deltaworks, Ships & Harbours, Boat Trip, Mills, Animals-watching / Horse Riding, Museums / Exhibitions, Monuments/Sights, Oyster Beds, Biological Food, Fish (Food), Mussels (Food), Other Regional/country-specific Food, Childhood Experiences, Holiday Park | Which tourism products seem to provide tangible travel benefits to German tourists who visit Zeeland in low-season? | compare Morrison 2013, pp. 13-15; Duden n.d.a/b; Smith & Puczkó (2014); WTO/ETC (2018) |
|                          |                                   | People            | Visitor Mix: Meet Friends / Acquaintances, Visitor Mix: Emptiness, Visitor Mix: Type of Tourists Hospitality, Dutch Mentality, Service Availability: Inspiration Points*, Hospitality*  |   |  |
|                          |                                   | Packages          | Arrangements, Seasonal Price Benefit  |   |  |
|                          |                                   | Programmes        | Sinterklaas, Straô-Riding, Market, Unspecific Event, Guided City Tour, No Carnival  |   |  |
|                          | Hobbies & Interests               | Hobbies           | <i>Interesting, enjoyable, and long-term beneficial pursuit (outside the job):</i><br>Photography, Diving, Kitesurfing, Sailing, Surfing, Windsurfing, Beach- & Watersports (in general), Flying Model Airplanes, Fishing, Horseback Riding   |   | Schiefele 1991   |
|                          |                                   | Interests         | <i>Motivating topics, tasks, or activities with assigned values or feelings:</i><br>Reduced Travel Time (Convenience), Enjoy Nature, Animals, Hiking & Walking, Cycling, Photography, Explore, Dutch Culture, WWII, Other History, Maritime, Art, Culinary, Shopping, Entertainment by Events, Fun, Camping, Sustainability, Quality (Reliability), Low Price   |   | Stebbins 1982; Oxford University Press (2019)  |

|                             |                           |   |  |  |  |
|-----------------------------|---------------------------|---|--|--|--|
| Intangible Benefits Sought  | Other Personal Motivators | Physical needs  | (No codes found)   | Which underlying intangible benefits do German low-season tourists seek to gain from the tourism products offered in Zeeland?  | compare Horner & Swarbrooke (2015, p. 76)                      |
|                             |                           | Emotional needs   | Familiarity, Nostalgia*, Atmosphere  |  |  |
|                             |                           | Personal needs  | "Geselligkeit"   |  |  |
|                             |                           | Personal development needs  | (No codes found)   |  |  |
|                             |                           | Status needs  | Celebrating Personal Events*   |  |  |
|                             |                           | Cultural needs  | (No codes found)   |  |  |
|                             | Health                    | Wellness health   | Tranquillity, Relaxation*, Flee & Recover from Everyday Life*; Wellbeing*, Pampering (Wellness Facilities are a Necessity)*, Pampering (Wellness Facilities are no necessity but may be used)* |  | compare Duden n.d.a/b/c; Smith & Puczkó (2014); WTO/ETC (2018) |
|                             |                           | Medical health  | General Medical Health*, Specific Medical Health*, Seaside Resort, Accessibility / Medical Care  |  |  |
|                             | Family commitments        | Family roles that oblige to a certain behaviour   | Parents / Grandparents, Other Family Relationships   |  | compare Becker (1960); Friedmann & Weissbrod (2005)            |
|                             |                           | Non-family roles that oblige to a certain behaviour (in case travel decision-relevant influence exists) | Dog-Owners   |  |  |
| Demographic Characteristics |                           | Age   | 18-24*, 25-49, 50-69*, older than 69*  | Which further demographic, geographic, and behavioural features characterise the identified interesting quality niche markets? | compare Johns & Gyimóthy                                       |
|                             |                           | Sex   | Female* / Male*  |  |  |
|                             |                           | Family life-cycle   | Families with children under school age*, Families with school children*, Families with adult children*, Childless (couple)  |  | compare Woodside & Jacobs (1985)                               |
| Geographic Characteristics  |                           | Place of residence  | City (> 100,000 inhabitants)*, Town (10,000-100,000 inhabitants)*, Small town (5,000-10,000 inhabitants)*, Village (< 5,000 inhabitants)*  |  | Bundesinstitut für Bau-, Stadt- und Raumforschung (2017)       |
|                             |                           |   | North Rhine-Westphalia, Other federal states   |  | (inductively retrieved)  |

|                             |                          |   |  |
|-----------------------------|--------------------------|---|--|
| Behavioural Characteristics | Visit Frequency          | First visit*, every other year or less*, once a year or more frequently (*); coming to Zeeland since being a child; coming to Zeeland since having children | Davis & Sternquist (1987)  |
|                             | Length of Stay           | Visit for day*, 1-3 nights(*), 4 nights or more nights(*), if one stayed longer;  | compare Davis & Sternquist (1987)  |
|                             | Place of Stay in Zeeland | Name of town / village  | compare Gitelson & Kerstetter (1990)                                     |
|                             | Time of Travel           | November*, December*, January*, February*; holidays, preferably in low-season, only in low-season, usually in summer; in winter holidays                    | compare Gitelson & Kerstetter (1990) and Jang, Morrison & O'Leary (2002) |
|                             | Travel Party             | Partner, Family, Friends & Groups, Other family members, Dog  | compare Jang, Morrison & O'Leary (2002)                                  |

\*confirmed deductive indicators (/ codes); (\*) confirmed but merged deductive indicators (/ codes)

Table 3. Operationalisation table of the main concepts 'Tangible Benefits Sought' and 'Intangible Benefits Sought' as well as the side concepts 'Demographic Characteristics', 'Geographic Characteristics', and 'Behavioural Characteristics'. The column about indicators shows deductive indicators (marked with \*) and inductive indicators, both used as codes for the analysis of the interviews. The right-hand column shows the sources that defined the dimensions, sub-dimensions, and deductive indicators.

## APPENDIX E – Research Instruments

### Interviews for Tourists

*Interview introduction based on advices by Kvale, as cited in Qu and Dumay, 2011, and McNamara, n.d.:*

**(English)** I am a student in the field of health tourism at the University of Applied Sciences in Vlissingen and currently writing my Bachelor thesis in the course of a project of the VVV Zeeland (,thus the tourism office for this province,) about quality tourism in low seasons. That means, that the low season, which we are currently in, shall be revived by attracting more guests for it becomes possible to provide more touristic offers, to prolong opening times, to keep shops and restaurants open all year round, and so forth. The other way around, this has the advantage for locals to benefit from more continuous income, more fulltime job instead of seasonal work, and that the province can become an attractive place to live for Dutch people. Actually, Zeeland is a bit like ‘the Schleswig-Holstein of the Netherlands’: Everybody wants to spend holidays there but living there is unattractive. With quality tourism, the province shall become more vibrant and attractive all year-round while staying authentic and being a benefit for guests as well as locals.

In my study, I focus on how to make low season more attractive for German guests. Therefore, I would like to know: ‘What do German guests do in Zeeland during low season?’, ‘Why do they like doing this here?’, and ‘What can be further improved about Zeeland as a holiday destination during low season?’ Thus, I am making little interviews with guests and you may feel warmly invited to participate and enjoy some ... *(incentives provided)* ... . Depending on how much you can and would like to tell me, the interview will take around 15 minutes, though you may decide anytime not to answer on a question or to leave the interview. All your answers will only be used for my Bachelor thesis. If you do not mind, I would like to record the answers for not losing details of your answers.

**(German)** Ich bin Studentin im Bereich „Gesundheitstourismus“ an der Fachhochschule in Vlissingen und schreibe gerade meine Bachelorarbeit im Rahmen eines Projektes des VVV Zeelands (,sprich des Tourismusbüros für diese Provinz,) über Qualitätstourismus in der Nebensaison. Das heißt, dass man die Nebensaison, in der wir uns ja gerade befinden, mehr beleben möchte, indem man etwas mehr Gäste, sodass es sich lohnt, in der Nebensaison mehr Angebote bieten zu können, Öffnungszeiten zu verlängern, Geschäfte ganzjähriger geöffnet zu haben, und so weiter. Das hat umgekehrt auch für die Anwohner den Vorteil, dass kontinuierlicheres Einkommen besteht, mehr Vollzeitstellen statt Saisonarbeit geboten werden kann, und die Provinz attraktiver für die Niederländer zum Leben wird. Zeeland ist nämlich so ein bisschen wie das Schleswig-Holstein der Niederlande: Alle möchten dort Urlaub machen, aber zum Wohnen ist es eher unattraktiv. Mit Qualitätstourismus soll die Provinz ganzjähriger belebt und attraktiv gemacht werden und dabei aber authentisch bleiben und zum Vorteil sowohl für Gästen als auch für Anwohner sein.

Ich spezialisiere mich in meiner Studie darauf, wie man die Nebensaison für deutsche Gäste attraktiver gestalten kann. Das heißt, ich möchte gerne wissen: „Was machen deutsche Gäste in Zeeland in der Nebensaison?“, „Warum machen sie das gerne hier?“, und „Was kann weiter verbessert werden an Zeeland als Urlaubsort in der Nebensaison?“ Ich mache also ein kleines Interview. Fühlen Sie sich herzlich eingeladen daran teilzunehmen und etwas ... *(incentives provided)* ... zu genießen. Abhängig davon, wie viel Sie mir erzählen können und wollen, dauert das Interview ca. 15 Minuten. Sie müssen aber auch nicht auf alle Fragen antworten, wenn Sie mögen oder weiterwollen. Alle ihre Antworten werden ausschließlich für meine Bachelorarbeit genutzt. Falls es Ihnen nichts ausmacht, würde ich gerne die Antworten aufzeichnen, nur um keine Details Ihrer Antworten zu vergessen.



| Phase 1: Which behavioural features characterize the niche markets?   |  |  | Background / Demographic questions   |  |   |
|---|--|--|--|--|---|
| 1   | Who are you traveling with?  |  |  |  |   |
| 2   | How frequently do you spend holidays in Zeeland?   |  |  |  |   |
| 3   | How long do you (usually) stay here in Zeeland for holidays?   |  |  |  |   |
| 4   | In which village or town are you staying?  |  |  |  |   |
| 5   | I would like to ask you now, why you decided to spend your holidays in Zeeland. Which benefits does Zeeland offer you as a holiday destination during this season? <i>(Transition to Phase 2)</i>  |  | Opinion and values questions<br><i>Prefatory statement + presupposition question</i> |  |   |
| Phase 2.1: Which tourism products seem to provide tangible travel benefits?<br>Experience and behaviour questions |  | Phase 2.2: Which interests/hobbies, family commitments, health purposes or other motivations seem to provide intangible travel benefits?<br>Opinion and values questions |  |  |   |
| 6   | <ul style="list-style-type: none"> <li>What do you do here in Zeeland?</li> <li>What do you like about this province?</li> <li>Which kind of event offers or other types of offers do you use here?</li> </ul>   | <i>Specifying presupposition questions</i>   | 7  | <ul style="list-style-type: none"> <li>Why do you do ... / like ... here? <i>(build up on wording)</i></li> <li>Which hobbies or interests can you connect with your holidays here?</li> <li>Are these holidays connected to wellness or health for you? <ul style="list-style-type: none"> <li>In how far?</li> </ul> </li> <li>You are traveling alone / with ... <i>(answer from Q1)</i>. In how far did this influence your decision to come to Zeeland? <ul style="list-style-type: none"> <li>In how far is Zeeland an attractive or also not attractive destination, when travelling alone / with ...?</li> </ul> </li> </ul> | <i>Specifying presupposition questions</i><br><br><i>Direct question</i><br><i>Probing question</i><br><i>Specifying presupposition question with prefatory statement;</i><br><i>Specifying questions</i> |
|   | <ul style="list-style-type: none"> <li>Which of these are the three most important ones (/...) for you? <i>(in case too many tourism products are mentioned)</i></li> <li>Do you mean, that you ... <i>(used tourism product) ...</i>, but you did not come specifically for this to Zeeland?</li> <li>Repeat significant words</li> <li>What are you doing there exactly?</li> <li>Do you have any specific preferences there?</li> </ul> | <i>Specifying question</i><br><br><i>Interpreting question</i><br><br><i>Follow-up question</i><br><i>Probing questions</i>  |  | <ul style="list-style-type: none"> <li>Which of these are the three most important ones (/...) for you? <i>(in case too many intangible benefits are mentioned)</i></li> <li>Repeat significant words</li> <li>Do you mean ...? / Does that mean that...?</li> </ul>   | <i>Follow-up question</i><br><i>Interpreting question</i><br><i>Probing question</i>  |
| 8   | <ul style="list-style-type: none"> <li>Why did you travel to Zeeland specifically during this time (for this)?</li> </ul>  |  | <i>Probing question</i>  |  |   |
| Phase 3: Improvements   |  |  | Opinion and values questions   |  |   |
| 9   | What would you say could still be improved about Zeeland as a holiday destination in low season? <ul style="list-style-type: none"> <li>Which offers or facilities do you miss or could be improved?</li> <li>Which services do you miss or could be improved?</li> </ul>  |  |  |  |   |
| 10  | Here I have some photos about Zeeland as a holiday region. I would like to ask you which of these photos you can connect with your own holidays here. Maybe there is something that you have already done yourself or that you would still like to do.   |  |  |  |   |
| Phase 4: Which demographic and geographic features characterize the niche markets?                                |  |  | Background / Demographic questions   |  |   |
| 11  | Where in Germany do you come from? <ul style="list-style-type: none"> <li>Do you come directly from that city?</li> <li>Around how many inhabitants does that place have?</li> </ul>   |  | <i>Specifying questions</i>  |  |   |
| 12  | Do you have children?<br>Are your children still living at home?   |  |  |  |   |
| 13  | At last, would you also tell me your age (and the age of your travel company?)   |  |  |  |   |

Table 4. Four research phases with the related English interview questions as they will be applied during the interviews with German tourists

| Phase 1: Which behavioural features characterize the niche markets?  |  |
|--|--|
| 1  | Mit wem sind Sie angereist?  |
| 2  | Wie häufig machen Sie Urlaub in Zeeland?   |
| 3  | Wie lange geht Ihr Aufenthalt (in der Regel)?  |
| 4  | In welchem Ort sind Sie untergebracht?   |
| 5  | Ich würde Sie jetzt gerne fragen, warum Sie sich dazu entschieden haben, Ihren Urlaub in Zeeland zu verbringen. Welche Vorteile bietet Ihnen Zeeland als Urlaubsort zu dieser Jahreszeit?  |
| Phase 2.1: Which tourism products seem to provide tangible travel benefits?  | Phase 2.2: Which interests/hobbies, family commitments, health purposes or other motivations seem to provide intangible travel benefits?   |
| 6  | 7  |
| <ul style="list-style-type: none"> <li>• Was unternehmen Sie hier in Zeeland?</li> <li>• Was gefällt Ihnen so gut an der Provinz?</li> <li>• Was für Veranstaltungen oder Angebote nehmen Sie hier wahr? <ul style="list-style-type: none"> <li>○ Was davon sind die drei wichtigsten [...] für Sie?</li> <li>○ Sie meinen, Sie haben ... (used tourism product) ..., sind aber nicht speziell deswegen nach Zeeland gereist?</li> <li>○ <i>Repeat significant words</i></li> <li>○ Was machen Sie genau? / ...schauen Sie sich genau an?</li> <li>○ Haben Sie dort irgendwelche Vorlieben?</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• Warum machen Sie ... / gefällt Ihnen... hier?</li> <li>• Welche Hobbies oder Interessen können Sie mit Ihrem Aufenthalt hier verbinden?</li> <li>• Steht dieser Urlaub für Sie im Rahmen Wellness oder Gesundheit? <ul style="list-style-type: none"> <li>○ In wie fern?</li> </ul> </li> <li>• Sie sind alleine / mit... (<i>answer from Q1</i>) angereist. In wie fern hat dies die Entscheidung, nach Zeeland zu reisen, beeinflusst? <ul style="list-style-type: none"> <li>○ In wie fern hat ist Zeeland ein attraktives oder auch nicht attraktives Reiseziel, wenn man alleine / mit ... reist?</li> </ul> </li> </ul> |
| 8  | <ul style="list-style-type: none"> <li>• Warum sind Sie (dafür) gerade zu diesem Zeitpunkt nach Zeeland gereist?</li> </ul>  |
| Phase 3: Improvements  |  |
| 9  | Was würden Sie sagen, könnte an Zeeland als Urlaubsort in der Nebensaison noch verbessert werden? <ul style="list-style-type: none"> <li>• Welche Angebote oder Einrichtungen fehlen oder könnten verbessert werden?</li> <li>• Welche Serviceleistungen fehlen Ihnen oder könnten verbessert werden?</li> </ul>   |
| 10   | Ich habe hier einige Fotos von Zeeland als Urlaubsregion. Ich würde Sie gerne fragen, welche von diesen Fotos Sie mit Ihrem eigenen Urlaub hier binden können. Vielleicht finden Sie etwas, dass sie selbst schon gemacht haben oder noch gerne machen wollen.   |
| Phase 4: Which demographic and geographic features characterize the niche markets?   |  |
| 11   | Woher kommen Sie aus Deutschland? <ul style="list-style-type: none"> <li>• Kommen Sie direkt aus der Stadt?</li> <li>• Wie viele Einwohner hat der Ort ungefähr?</li> </ul>  |
| 12   | Sind Sie verheiratet?<br>Haben Sie Kinder?<br>Sind diese schon außer Haus?   |
| 13   | Würden Sie mir noch Ihr Alter verraten (und das Alter Ihrer Reisebegleitung)?  |

Table 5. Four research phases with the related German interview questions as they will be applied during the interviews with German tourists

## Interviews for Customer Service Employees

*Interview introduction based on advices by Kvale, as cited in Qu and Dumay, 2011, and McNamara, n.d.:*

**(English)** I am a student in the study programme 'Vitality and Tourism Management' at the HZ University of Applied Sciences in Vlissingen and currently writing my bachelor thesis about German niche markets that allow quality tourism in Zeeland and could be addressed in low seasons. As you know, tourism should be more spread over the year, be to the advantage of both tourists and locals, and support Zeeland in being an attractive and authentic destination.

Therefore, I would like to ask you as an expert on German tourists who visit Zeeland in low seasons: 'What do German tourists *do* in Zeeland during low season?', 'Why do they like doing this here, and specifically during low season?', and 'What can be further improved about the holiday destination of Zeeland during low season?'. Besides that, I will have some formal questions like 'With who do German tourists travel to Zeeland during low season', and so on. For me, low season defines the time from the months of November until March.

The interview can take up to 30 minutes. All your answers will remain confidential, though I would like to record the interview for myself for avoiding misinterpreting or not memorizing certain answers. If you prefer, I can also take notes only. I would like you to talk as a representative for your German clients, stating what would mirror them best and which interesting outliers you have experienced. As not all tourists are the same of course, you may describe several types of tourists. Please, just make clear during our interview, which type of tourist (e.g. people aged 65+) you are referring to in that moment.

**(Dutch)** Ik studeer "Toerisme en Vitaliteits-Management" aan de HZ Universiteit in Vlissingen en doe mijn afstudeeronderzoek over Duitse nichedoelgroepen die kwaliteits-toerisme in Zeeland mogelijk maken en voor het laagseizoen angeworven kunnen worden. Als u al weet, zal toerisme verder in seizoenen worden gespreid, voordelig zowel voor gasten als voor de inwoners van Zeeland zijn en Zeeland als aantrekkelijke en authentieke vakantiebestemming ondersteunen.

Om deze reden zou ik u als experte voor Duitse toeristen in het laagseizoen graag vragen: "Wat doen Duitse gasten in Zeeland tijdens het laagseizoen?", "Waarom vinden ze deze activiteiten / aanbiedingen leuk?" en "Wat kan er verder worden verbeterd op de bestemming Zeeland tijdens het laagseizoen voor Duitse gasten?". Verder heb ik enkele formele vragen, zoals "Met wie reizen Duitse gasten naar Zeeland in het laagseizoen?" enzovoort. Met "laagseizoen" bedoel ik alle maanden tussen november en maart.

Het interview kan wel tot 30 minuten duren. Al uw antwoorden worden vertrouwelijk behandeld. Wel zou ik het interview mogen opnemen, alleen voor mijzelf om later nog een keer te controleren of ik alles goed heb begrepen en of ik ook niets heb vergeten. Anders kan ik ook alleen notities maken. Omdat natuurlijk niet alle toeristen gelijk zijn, kunt u graag over verschillende typen toeristen tijdens het interview praten. Voor mij zal het dan behulpzaam zijn als u verduidelijkt welke specifieke typ toerist je juist bedoelt.

| <b>Phases 1 and 4: Which demographic, geographic, and behavioural features characterize the niche markets?</b>                                  |  |
|---|--|
| 1   | With who do German tourists travel to Zeeland in low season?   |
| 2   | In which stage of family life-cycle are the tourists <i>(always referring to low season tourists)</i> ?  |
| 3   | What is the age the tourists (and the age of their travel company?)  |
| 4   | How frequently do the tourists spend holidays in Zeeland?  |
| 5   | How long do the tourists stay here in Zeeland for holidays?  |
| 6   | In which villages or towns of ... (name of municipality)... do the tourists stay?  |
| 7   | Where in Germany do the tourists come from?<br><ul style="list-style-type: none"> <li>• What is more or less the size of cities or towns that the tourists come from?</li> </ul>   |
| 8   | Now I would like to ask you, why German low season tourists decide to spend their holidays in Zeeland. Which benefits does Zeeland offer to the tourists as a holiday destination during low season?   |
| <b>Phase 2.1: Which tourism products seem to provide tangible travel benefits?</b>  |  |
| <i>Experience and behaviour questions</i>   |  |
| 9   | <ul style="list-style-type: none"> <li>• What do the tourists do here in Zeeland?</li> <li>• What do the tourists like about this province?</li> <li>• Which kind of event offers or other types of offers do the tourists use in Zeeland?</li> </ul> <ul style="list-style-type: none"> <li>○ Which of these are the three most important ones (/... for the tourist? <i>(in case too many tourism products are mentioned per tourist type)</i></li> <li>○ Do you mean, that they ... <i>(used tourism product)</i> ..., but they did not come specifically for this to Zeeland?</li> <li>○ <i>Repeat significant words</i></li> <li>○ What do they do exactly?</li> <li>○ Do they have any specific preferences there?</li> </ul>  |
| <b>Phase 2.2: Which interests/hobbies, family commitments, health purposes or other motivations seem to provide intangible travel benefits?</b> |  |
| <i>Opinion and values questions</i>   |  |
| 10  | <ul style="list-style-type: none"> <li>• Why do the tourists do ... / like ... here? <i>(build up on wording)</i></li> <li>• Which hobbies or interests can the tourists connect with their holidays in Zeeland?</li> <li>• Are holidays connected to wellness or health for some of the tourists? <ul style="list-style-type: none"> <li>○ In how far?</li> </ul> </li> <li>• When the tourists travel alone / with ... <i>(pick one answer from Q1)</i> ..., in how far did this influence their decision to come to Zeeland? <ul style="list-style-type: none"> <li>○ In how far is Zeeland an attractive or also not attractive destination, when travelling alone / with ...?</li> </ul> </li> </ul> <ul style="list-style-type: none"> <li>○ Which of these are the three most important ones (/... for the tourist? <i>(in case too many intangible benefits are mentioned)</i></li> <li>○ <i>Repeat significant words</i></li> <li>○ Do you mean ...? / Does that mean that...?</li> </ul> |
| 11  | <ul style="list-style-type: none"> <li>• For what reasons do the tourists travel to Zeeland specifically during low season?</li> <li>• In how far do German tourists differ depending on the month in which they travel to Zeeland during low season?</li> </ul>   |
| 12  | <ul style="list-style-type: none"> <li>• Which niche markets have you eventually come across among German low season tourists?</li> </ul>  |
| 13  | Looking at these pictures, which of these represent the holidays of German low season tourists?<br>Which photos do you miss?<br>Which photos do you think are abundant as they are irrelevant for low seasons in Zeeland?  |
| <b>Phase 3: Improvements</b>  |  |
| 14  | What would you say could still be improved about Zeeland as a holiday destination in low season?<br><ul style="list-style-type: none"> <li>• Which offers or facilities do German low season tourists miss or could be improved?</li> <li>• Which services do German low season tourists miss or could be improved?</li> </ul>   |
| 15  | At the end of our talk, is there still anything left that you would like to say about German low season tourists that you have not been able to say yet?   |

Table 6. Four research phases with the belonging English interview questions for employees of the VVV Inspiration Points and the tourism information in Middelburg

| Phases 1 and 4: Which demographic, geographic, and behavioural features characterize the niche markets?   |  |
|---|--|
| 1   | Met wie reizen Duitse gasten naar Zeeland in het laagseizoen?  |
| 2   | In welke gezinsituatie zijn de toeristen ( <i>always referring to low season tourists</i> )?   |
| 3   | Hoe oud zijn de toeristen (en hun reisgenoten)?  |
| 4   | Hoe vaak komen de toeristen naar Zeeland voor hun vakantie?  |
| 5   | Hoe lang is het verblijf van de toeristen in Zeeland?  |
| 6   | In welke dorpen of steden van ... (naam gemeente)... verblijven de toeristen?  |
| 7   | Waar precies vanuit Duitsland komen de toeristen vandaan? <ul style="list-style-type: none"> <li>Hoe groot zijn de steden of dorpen waar Duitse gasten komen vandaan?</li> </ul>   |
| 8   | Ik zou je nu graag vragen, waarom Duitse gasten beslissen, hun vakantie in het laagseizoen in Zeeland door te brengen. Welke voordelen biedt de bestemming Zeeland aan toeristen tijdens het laagseizoen? ( <i>Transition to Phase 2</i> )   |
| Phase 2.1: Which tourism products seem to provide tangible travel benefits?   | Phase 2.2: Which interests/hobbies, family commitments, health purposes or other motivations seem to provide intangible travel benefits?   |
| 9   | 10   |
| <ul style="list-style-type: none"> <li>Wat doen de toeristen hier in Zeeland?</li> <li>Wat vinden de toeristen leuk aan de provincie?</li> <li>Welke evenementen en aanbiedingen gebruiken de toeristen? <ul style="list-style-type: none"> <li>Welke van deze ... (activiteiten / aanbiedingen) ... zijn de drie belangrijkste voor de toeristen?</li> <li>Bedoel je, dat... (<i>used tourism product</i>) ..., maar dat ze niet speciaal voor deze reden/hiervoor naar Zeeland reizen?</li> <li><i>Repeat significant words</i></li> <li>Wat doen zij er precies? / Waar kijken ze precies naar?</li> <li>Hebben zij eventuele voorkeuren?</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>Waarom doen toeristen ... / vinden toeristen ... leuk hier in Zeeland?</li> <li>Welke hobby's of interesses kunnen de toeristen met hun verblijf in Zeeland combineren?</li> <li>Zijn de vakanties van enkele toeristen verbonden met wellness of gezondheid? <ul style="list-style-type: none"> <li>In hoeverre?</li> </ul> </li> <li>Als toeristen alleen / met ... (<i>answer from Q1</i>) ... reizen, in hoeverre heeft dit hun beslissing om naar Zeeland te komen beïnvloed? <ul style="list-style-type: none"> <li>In hoeverre is Zeeland een aantrekkelijke of onaantrekkelijke bestemming als je alleen / met ... reist?</li> <li>Welke van deze ...(<i>voordelen</i>)... zijn de drie belangrijkste voor de toeristen?</li> <li><i>Repeat significant words</i></li> <li>Bedoel je ...? / Dat betekent...?</li> </ul> </li> </ul> |
| 11  | <ul style="list-style-type: none"> <li>Voor welke precieze reden reizen de toeristen naar Zeeland in het laagseizoen?</li> <li>In hoeverre verschillen Duitse toeristen ten opzichte van de maand in welke zij tijdens het laagseizoen naar Zeeland reizen?</li> </ul>   |
| 12  | <ul style="list-style-type: none"> <li>Welke nichemarkten zijn jullie eventueel opgevallen?</li> </ul>   |
| 13  | <p>Als u op deze fotos kijkt, welke van deze representeren de vakantie van Duitse toeristen tijdens het laagseizoen?<br/>Welke onderwerpen ontbreken?<br/>Welke fotos, denkt u, zijn overbodig omdat ze niet relevant zijn voor een vakantie in Zeeland tijdens het laagseizoen?</p>   |
| Phase 3: Improvements   |  |
| 14  | <p>Wat denkt u kan er nog verder worden verbeterd op Zeeland als vakantiebestemming tijdens het laagseizoen?</p> <ul style="list-style-type: none"> <li>Welke toeristische producten of faciliteiten ontbreken voor Duitse toeristen of kunnen verder worden verbeterd?</li> <li>Welke diensten ontbreken voor Duitse toeristen of kunnen verder worden verbeterd?</li> </ul>  |
| 15  | Aan het einde van ons gesprek, is er nog iets, dat u graag wil toevoegen over Duitse gasten in het laagseizoen, maar dat u nog niet heeft kunnen zeggen?   |

Table 7. Four research phases with the belonging Dutch interview questions for employees of the VVV Inspiration Points and the tourism information in Middelburg

Photo Elicitation

*Content removed in published version for reasons of privacy rights.*

## Changed Photo Cards

| New or repositioned photos for photo elicitation in February  | Unselected or repositioned photos for photo elicitation in February   |
|---|---|
| <b>First changes before tourist interviews</b>  |   |
| <p>Fig. 12 Goes harbour – Employee from Goes (IP.A/G) recommended representation of a harbour (preferably harbour in Goes) among photos</p> <p>Fig. 32 Boat Tour – Better representation of the topic boating</p> <p>Fig. 48 Fish – Employees (also from Domburg in an informal conversation) mentioned fish being a preferred dish among German guests</p>   | <p>A photo of the Badhuis in Domburg – Twice representation of Domburg on the city card, Fig. 5 showing Domburg more in total</p> <p>A photo of tourists in a moored boat – Direct visibility of the topic boating doubtful</p> <p>A photo of a cheese retailer – Cheese does not belong to primary special local dishes of Zeeland</p>   |
| <b>Second changes before interviews in February (see changes in Table 10)</b>   |   |
| <p><b>Cities &amp; architecture</b></p> <p><u>Fig. 12.1 Terneuzen*</u> – Preparation for interviews in Zeeuws-Vlaanderen, more representation of Zeeuws-Vlaanderen in general, selection of a city with maritime topic and lying far from the coast; Recommendation of IP.H/S to choose Breskens or Cadzand-Bad instead of Terneuzen as they are visited more</p> <p><u>Fig. 13.1 Zierikzee*</u> – A “hidden pearl” among Zeeland’s cities that addresses interests such as culture, Dutch architecture, and shopping</p> <p><u>Fig. 16.1 Sluis*</u> – Preparation for interviews in Zeeuws-Vlaanderen, more representation of Zeeuws-Vlaanderen in general, selection of a city with a VVV Inspiration Point that addresses interests such as culture and shopping and that does not lie the coast</p> <p><b>Wellness &amp; health</b></p> <p><u>Fig. 23.1 Sauna*</u> – Saunas are part and parcel of the German wellness culture and got mentioned by some respondents</p> <p><b>Events</b></p> <p><u>Fig. 59.1 Straô</u> – Shifted from the tradition to the event card as it revealed to be a well-visited event to which some people adapt the time planning of their holidays</p> | <p><u>Fig. 12 Goes harbour</u> – Twice representation of the city of Goes and of a harbour on the card (due to the new photo 13.1). Also, churches were sporadically mentioned among sights or places of interest</p> <p><u>Fig. 13 Catacombs</u> – Location was a frequent point of discussion but photo got never chosen or connected with any interests</p> <p><u>Fig. 16 Castle Westhove</u> – Nnever chosen except of by one couple because they connected it romantically to their relationship</p> <p><u>Fig. 23 Loungers</u> – No very special wellness facility, also mostly connected with rest and relaxation which respondents mentioned to achieve when coming to Zeeland in general</p> <p><u>Fig. 59 Lectures &amp; Presentations</u> – Never chosen by guests, presumably more relevant for business guests</p> |

Fig. 63.1 Sinterklaas\* – Interest was shown among the young and the older guests and was confirmed by employees

### **Culture (merged category of culture and tradition)**

Fig. 42.1 Mill – Shifted from the tradition card to the culture card since the topic of the tradition card sometimes appeared to be unclear for respondents

Fig. 43.1 Brochures – Shifted from the tradition card to the culture card since the topic of the tradition card sometimes appeared to be unclear for respondents

Fig. 47.1 Girl in traditional cloth – More modern representation of culture and traditions; Replaced Fig. 82 that got shifted from the tradition card since the topic of the tradition card sometimes appeared to be unclear for respondents

### **Watersports**

Fig. 81.1 Windsurfing\* – Discovered specific interest with niche-potential in interviews with IP.F/R, G40 and G41 (IP.H/S was not sure nationality of windsurfer)

Fig. 84.1 Divers\* – Discovered specific interest with niche-potential in interviews with G22 and G23

Fig. 85.1 Kitesurfing\* – Discovered specific interest with niche-potential in interviews with IP.D/Z, IP.F/R, G42 and G45

### **Families with Children (new category, replacing “Geselligkeit”)**

Fig. 74.1 Stoomtrein – Shifted from culture card into the new card category about families and children as it is especially a child attraction

Fig. 75.1 Het Arsenaal – Shifted from culture card into the new card category about families and children as it is a child attraction

### **Social roles**

Fig. 73.1 “Geselligkeit” in a good restaurant - Shifted from card about “Geselligkeit” to card about social roles where “Geselligkeit” also plays a role and also covers the social roles in friendships

Fig. 63 Onderstroom Festival – Summer event; Concert at Sea remained in Fig. 62 as also the discussion about not existent offers was valuable

Fig. 42 Painting – Making room for mill photo, the topic of art still remains represented by Fig. 55

Fig. 43 Het Arsenaal – Child attraction that got shifted to the new card about families with children

Fig. 82 Old woman in traditional cloth – Never chosen card, assumption that the photo could be connected with culture being something for older and maybe also conservative generation

Fig. 81 Paddling – Never chosen by guests

Fig. 84 Ice-surfing – Never chosen by guests and too much dependence on very long and cold weather conditions that happen less and less

Fig. 85 Yacht harbour – Double representation of yachts whereby Fig. 80 shows more the active sports activity of sailing

Fig. 74 “Geselligkeit” in a café – Difference to Fig. 75 seemed not visible for respondents, also was Fig. 74 never explicitly chosen

Fig. 75 “Geselligkeit” in a good restaurant – Shifted from card about “Geselligkeit” to card about social roles where “Geselligkeit” also plays a role and also covers the social roles in friendships

Fig. 73 Friendship – Never chosen by guests, maybe also associated too much with the topic of eating

Table 9. Explanation for reasons to replace or shift and re-categorize photos for the photo elicitation method for interviews in February (and, as first planned, also March) 2020; New photos, that were not represented in the first photo selection, are indicated by \*.



*Content removed in published version for reasons of privacy rights.*

## APPENDIX F – Places of Interview Conduction

### Contacted Partners of VVV Zeeland for Requesting Interview

| Walcheren                                  |                 |   |      |  |                              |  |  |
|--|-----------------|---|------|--|------------------------------|--|--|
| Bedrijf                                    | Plaats          | Contactpersoon                            | Tel. | Mail   | Gecontacteerd                | Reactie  | Gesloten / Andere informatie   |
| Hotel de Burg                              | Domburg         |   |      | info@hoteldeburg.nl                                | X                            | Ja   | 16-26 dec + 6-16 jan., Vele gasten in januari!   |
| BOMONT                                     | Domburg         | Sandy                                     |      | domburg@bomont.nl                                  | X                            | Ja (te vele gasten uit Domburg)                    | 21/22 febr.  |
| Hotel Brasserie De Leugenaar               | Vlissingen      | Lianne Boone                              |      | info@hoteldeleugenaar.nl<br>info@hotel-duinoord.nl | X (+ gebeld, nooit aanwezig) | Geen reactie                                       |  |
| Hotel Zomerlust                            | Zoutelande      | Lia Vader                                 |      | info@duinhotelzomerlust.nl                         | X                            | Ja (geen gast wilde deelnemen)                     | tot 27 december, geopend tijdens nieuwjaar, dann alweer elke weekend vanaf 14 januari en dagelijks vanaf eind januari ; afgezegd door interviewer (te veel interviews) |
| Hotel Kijkduin Domburg                     | Domburg         | Erik van Bommel                           |      | info@hoteltijkduin.nl                              | X (door relatie manager)     | Ja (te vele gasten uit Domburg)                    | januari - april, geen afspraak gemaakt   |
| Zonning Walcheren                          | Westkapelle     | Rick Westrate                             |      | zonningwalcheren@zeelandnet.nl                     | X (door relatie manager)     | Ja   | E-mail contact met gasten via bedrijf  |
| Zeeuws maritiem muZEEum                    | Vlissingen      | Niet opgevraagd                           |      | info@muzeeum.nl                                    | X                            | Geen reactie                                       | dinsdag - zondag 10:00 - 17:00; Marjan Smit  |
| Van der Valk Hotel Middelburg              | Middelburg      | Geachte heer Akerboom                     |      |  | X                            | Geen reactie                                       |  |
| Aparthotel Waepen van Middelburg           | Middelburg      | Mevrouw Romijn                            |      | info@waepenvanmiddelburg.nl                        | X (+ gebeld)                 | Nee, onhandig (werknemers, appartementen)          |  |
| Zorgstroom                                 | Middelburg      | Niet opgevraagd                           |      |  |                              | Geen zorghotel meer in Zeeland                     |  |
| B&B t Poothuis                             | Middelburg      | De heer P. Blom (Peter)                   |      |  | X (+ gebeld)                 | Geen reactie                                       |  |
| Indoor Speeltuin Zwierelantijn             | Domburg         | Miranda                                   |      | info@zwierelantijn.nl                              | X                            | Ja   | ma., di., don., Vragen of Duitse gasten aanwezig zijn, open altijd 12:30 - 18:00   |
| Zeeuws Museum                              | Middelburg      | Yvette Lardinois, Raymond van Kralingen   |      |  | X                            | Ja   |  |
| De Drukkerij - Tourist Info                | Middelburg      |   |      | info@touristinfomiddelburg.nl                      | X                            | Ja   |  |
| Villa Hotel Vlissingen                     | Vlissingen      | Aréke en Jos Schipper                     |      | info@villahotelvlissingen.nl                       | X (+ gebeld)                 | Nee, geen duitse gasten of alleen zakelijke gasten |  |
| Bonaventure                                | Vlissingen      | De heer Hu                                |      |  | X                            | Geen reactie                                       |  |
| Zeeuws-Vlaanderen                          |                 |   |      |  |                              |  |  |
| Bedrijf                                    | Plaats          | Contactpersoon                            | Tel. | Mail   | Gecontacteerd                | Reactie  | Gesloten / Andere informatie   |
| Hotel Noordzee                             | Cadzand-Bad     | Peter Faas                                |      |  | X                            | Ja   | 06 01 - 07 02 2020   |
| Molecaten Park Hoogduin                    | Cadzand-Bad     | Ronald Cornelissen                        |      |  | X                            | Nee  |  |
| Hotel de Blanke Top                        | Cadzand-Bad     | Patrick Dielen                            |      |  | X                            | Nee  |  |
| Strandhotel Cadzand                        | Cadzand-Bad     | Anne Gorthmanns                           |      |  | X                            | Nee  |  |
| Strandcamping Groede                       | Groede          | Jessica Seijl/Isse de Smit                |      |  | X                            | Nee  | Gesloten tijdens laagseizoen, maar interesseert in onderzoeksresultaten  |
| Strand Ruig (Strandpaviljoen)              | Cadzand-Bad     | Freek de Feijter                          |      | info@strandruig.nl                                 | X                            | Geen reactie                                       |  |
| Lindenhoeve in Sluis                       | Sluis           | De heer S. Langenberg                     |      | info@delindenhoeve.nl                              | X                            | Geen reactie                                       |  |
| Schouwen-Duiveland                         |                 |   |      |  |                              |  |  |
| Bedrijf                                    | Plaats          | Contactpersoon                            | Tel. | Mail   | Gecontacteerd                | Reactie  | Gesloten / Andere informatie   |
| Hotel Restaurant t Klokje                  | Renesse         | Marcel de Bil en Franciska de Bil-Dekkers |      | info@hoteltklokje.nl                               | X                            | Geen reactie                                       |  |
| Hotel Bru                                  | Bruinisse       | Patricia Hoep                             |      | info@hotelbru.nl                                   | X                            | Geen reactie                                       |  |
| Resort Land & Zee                          | Scharendijke    | Dieneke Verpalen                          |      |  | X                            | Geen reactie                                       |  |
| Badhotel Renesse                           | Renesse         | Olav Davidse                              |      |  | X                            | Geen reactie                                       |  |
| Recreatiebedrijf Boot                      | Noordvliet      | Wilma Passchier                           |      | info@recreatiebedrijfboot.nl                       | X                            | Nee  | Gesloten tijdens laagseizoen   |
| Vakantiepark Zonedorp                      | Renesse         | John en Marieke Braber                    |      | mail@zonedorp.com                                  | X                            | Geen reactie                                       |  |
| Strandpark de Zeeuwse Kust                 | Renesse         | Marc Ruijtenberg                          |      | info@hoteldzeeuwsekust.nl                          | X                            | Ja   | januari - maart in de weekenden  |
| Camping t Hoge Zand                        | Sirjansland     | Tamara Hammink                            |      | info@campinghogezand.nl                            | X                            | Geen reactie                                       | Alleen jaarplaatsen geopend  |
| Watersnoodmuseum                           | Ouwekerk        | Liza de Bie                               |      | info@watersnoodmuseum.nl                           | X (+ gebeld + 2de mail)      | Ja   |  |
| Landal Port Greve                          | Brouwershaven   | mevrouw A. Volwerk                        |      | Portgreve@landal.nl                                | X + gebeld                   | Nee  |  |
| Landal Duinpark t Hof van Haamstede        | Burgh-Haamstede | Saskia van der Zee                        |      |  | X + gebeld                   | Ja   |  |
| Noord- en Zuid-Beveland                    |                 |   |      |  |                              |  |  |
| Bedrijf                                    | Plaats          | Contactpersoon                            | Tel. | Mail   | Gecontacteerd                | Reactie  | Gesloten / Andere informatie   |
| Hotel en Brasserie Katoen                  | Goese           | Mevrouw M. (Marjolein) Karman             |      |  | X                            | alleen zakelijke gasten                            |  |
| Roompot Vakantiedialyse                    | Goese           | Niet opgevraagd                           |      |  | X                            | gesloten tijdens laagseizoen                       |  |
| Ardoer Camping en Villapark de Paardekreek | Kortgene        | Mevrouw Huiszoon                          |      | paardekreek@ardoer.com                             | X                            |  | niet genoeg Duitse gasten, interview met medewerkers mogelijk; Vragen op 14 februari -> langskomen tijdens carnaval  |
| Camperpark Zeeland                         | Kamperland      | De heer M. de Jonge                       |      | info@camperparkzeeland.nl                          | X                            |  |  |

Table 11. Contacted partner organisations of VVV Zeeland for conducting interviews with guests on site; light green: Confirmation; dull green: Confirmation but no interview due to unsuitable conditions

## Places of Interview Conduction



Figure 4. Location map of province Zeeland in the Netherlands. Adapted from Wikipedia website, by E. Frohne, 2009, retrieved from [https://nl.wikipedia.org/wiki/Bestand:Netherlands\\_Zeeland\\_location\\_map.svg](https://nl.wikipedia.org/wiki/Bestand:Netherlands_Zeeland_location_map.svg) Copyright 2009 by Wikimedia and Mediawiki

Figure 88 shows the tourist places in Zeeland where interviews were taken between November 2019 and February 2020. Grey circle fillings indicate where tourists were interviewed and the first digital in brackets how many of them. Orange circle shapes indicate where tourism information employees were interviewed and the second digital in the brackets how many of them.

## APPENDIX G – Data of Interview Respondents

| November |            |          |                             |           |             |  |             |   |   |  |  |  |   |   |                                |
|----------|------------|----------|-----------------------------|-----------|-------------|--|-------------|---|---|--|--|--|---|---|--------------------------------|
| Nr       | Date       | Code     | Place                       | Time      | Length      | Age                                      | Sex         | Family Life-Cycle                       | Travel Party  | Residence  | Visit Frequency  | Length of Stay   | Place of Stay   | Time of Travel                                    | Transcribed                    |
| 1        | 24.11.2019 | G12/CB   | Cadzand-Bad, Hotel Noordzee | 10:56     | 00:13:36    | 45, 48                                   | f, m        | Family with School child                | Partner (travel alone during low-season and with sun in high-season)              | North Rhine-Westfalia; Cologne > (presumably) town   | 1-3x / year  | Low-season: 2-3 nights (2 nights, weekend); High-season: 4-9   | Cadzand-Bad (trial), usually Domburg (before and from next year on again) | Low-season: Weekend; High-season: Summer holidays | X                              |
| 2        | 24.11.2019 | G3/4/CB  | Cadzand-Bad, Hotel Noordzee | 11:17     | 00:24:27    | 47, 50                                   | f, m        | Childless couple                        | Partner   | North Rhine-Westfalia; Cologne > "städtische Randstadt," (presumably) town   | 2x / year  | 1 night (weekend)  | Cadzand-Bad   | End of November (birthday G3), March/April        | X                              |
| 3        | 25.11.2019 | G5/6/D   | Domburg, Hotel de Burg      | 09:10     | 00:11:26    | 73, 55                                   | m, f        | Childless couple                        | Partner; part of a bigger group of people who are guests of one couple            | North Rhine-Westfalia; around Cologne > village > 2,500 inhabitants  | 1st time (want to come back)   | 2-3 nights (3 nights, weekend)   | Domburg   | November (want to come back only in November)     | X                              |
| 4        | 25.11.2019 | G7/8/D   | Domburg, Hotel de Burg      | 10:32     | 00:11:00    | 51, 52                                   | f, m        | Family with child under school age      | Partner + 1 friend; part of a bigger group of people who are guests of one couple | North Rhine-Westfalia; Cologne > city > 1,046,000 inhabitants  | G8: regularly for 30 years, during past years less due to child; 2 times in low-season for celebrating festivity | Now: 2-3 nights (weekend); Usually in high season: G8: 2-3 nights (weekend / long weekend); G7: 4-9 nights (long weekend - one week) | Domburg, Oostkapelle  | November; Usually coming in high-season           | X                              |
| 5        | 25.11.2019 | G9/D     | Domburg, Hotel de Burg      | ca. 11:00 | ca. 10 min. |  | m           | Childless couple                        | Couple and their guests for their silver wedding                                  | North Rhine-Westfalia; Cologne > city > 1,046,000 inhabitants  | "very frequently"  | 2-3 nights (3 nights)  | Domburg (liked the most), Zoutelande, Kattendijke, Oostkapelle            | Winter (November), rest unknown                   | notes-based because unrecorded |
| 6        | 28.11.2019 | G10/11/D | Domburg, IP                 | 14:33     | 00:17:01    | 54, 27, (55 husband, 2 grandchild) + Dog | f, f (m, m) | Family with adult children + grandchild | Family (grandparents + adult daughter + grandchild) + dog                         | Grandparents: Hesse; Hanau > Town > 96,000 inhabitants);<br>Daughter: Bavaria; Town > Rosenheim > 63,000 inhabitants | Every other year or less; First time with daughter and grandchild  | 4-9 nights ("gute 8 Tage")   | Domburg (last 4 years), Callantssoog, Helder                              | End of November (for the past years)              | X                              |
| 7        | 28.11.2019 | G12/13/D | Domburg, IP                 | 16:07     | 00:23:59    | 55, 55                                   | m, f        | Family with adult children              | Partner   | Rhineland-Palatinate; Reckershausen > Village > 363 inhabitants  | More frequently than once a year (1-2 times)   | 2-3 nights / 4-9 nights (4-5 days) in winter (5-9 nights - "a week" - in summer)   | Aagtekerke  | November (and in summer)                          | X + notes                      |

| December |            |          |                    |           |          |        |      |   |  |   |  |   |  |   |             |
|----------|------------|----------|--------------------|-----------|----------|--------|------|---|--|---|--|---|--|---|-------------|
| Nr       | Date       | Code     | Place              | Time      | Length   | Age    | Sex  | Family Life-Cycle                           | Travel Party                                     | Residence   | Visit Frequency  | Length of Stay  | Place of Stay                                  | Time of Travel  | Transcribed |
| 8        | 14.12.2019 | G24/Zou  | Zoutelande, IP     | ca. 12:00 | 00:07:06 | 52     | f    | Couple (either childless or adult children) | Partner  | North Rhine-Westfalia; Stolberg near Aachen > Town > 57,000   | More frequently once a year (2-3 times); First time 1997 for honeymoon in Vlissingen | 2-3 nights (mostly over weekend)                                    | Vlissingen                                     | More low- than high season (work-related)                     | X           |
| 9        | 15.12.2019 | G14/15/D | Domburg, Boulevard | 10:23     | 00:04:45 | 19, 19 | m, f | Childless couple                            | Partner  | North Rhine-Westfalia; Cologne > city > 1,046,000 inhabitants | First time (G14); Every other year or less (G15)                                     | 1 night   | Domburg  | December  | X           |
| 10       | 15.12.2019 | G16/17/D | Domburg, Boulevard | 10:02     | 00:12:08 | 30, 30 | f, m | Childless couple                            | Family (couple with mother of one of them) + dog | North Rhine-Westfalia; Close to Bonn > City > 300,000         | Once a year; More frequently than once a year (1, sometimes 2 times)                 | 2-3 nights (normal or longer weekend); In summer 4-9 weeks (a week) | Walcheren; Domburg, Vrouwenpolder, Oostkapelle | 2nd time in December; regularly in summer; sometimes carnival | X           |

|    |            |          |                        |       |          |                   |      |   |   |  |  |  |  |   |   |
|----|------------|----------|------------------------|-------|----------|-------------------|------|---|---|--|--|--|--|---|---|
| 11 | 15.12.2023 | G18/19/D | Domburg, Café          | 15:01 | 00:16:06 | 27, 29 (child: 1) | m, f | Family with adult children + grandchild                 | Family (grandparents + couple + grandchild) | North Rhine-Westfalia; Cologne > village   | Once a year; More frequently than once a year (1, sometimes 2 times) | 2-3, 4-9 nights (max. 5 days, weekend or longer weekend) | Domburg, holiday house from friend     | March and December (depend. on when a friend's holiday house in Roompot is empty) | X |
| 12 | 19.12.2019 | G20/21/Z | Zierikzee, City Centre | 14:35 | 00:12:17 | 54, 54            | m, f | Couple (either childless or adult children)             | Partner + dog                               | Hesse, Gießen > village  | More frequently once a year (2-4 times)                              | 4-9 nights (Monday-Friday, special offer)                | Renesse, Roompot park                  | Now first time in winter (December)   | X |
| 13 | 19.12.2019 | G22/23/Z | Zierikzee, City Centre | 15:06 | 00:30:33 | 47,60             | f, m | Unknown, but apparently independent from young children | Friends                                     | North Rhine-Westfalia, Cologne > city > 1,046,000 inhabitants (originally from Solingen) | G22 already for 15 years; G23 for 30 years                           | 4-9 nights (one week)                                    | Burgh-Hamsteede; campsite with caravan | All year-round  | X |

| January |            |                |                                     |           |             |                             |            |   |                                      |   |  |  |   |  |                                |
|---------|------------|----------------|-------------------------------------|-----------|-------------|-----------------------------|------------|---|--------------------------------------|---|--|--|---|--|--------------------------------|
| Nr      | Date       | Code           | Place                               | Time      | Length      | Age                         | Sex        | Family Life-Cycle                                       | Travel Party                         | Residence   | Visit Frequency  | Length of Stay                                       | Place of Stay   | Time of Travel   | Transcribed                    |
| 14      | 10.01.2020 | G25/26/V       | Vlissingen, city centre             | 13:16     | 00:16:41    | 59, 53                      | f, m       | Family with adult children                              | Couple                               | Hesse; Bad Homburg > town > 53,000 inhabitants  | Once a year  | 4-9 nights (one week)                                | Domburg   | Mostly in winter   | X                              |
| 15      | 10.01.2020 | G27/28/V       | Vlissingen, city centre             | 14:35     | 00:19:47    | 44, 43                      | m, f       | Family with child under school-age                      | Couple                               | Hessen, Offenbach > city > 125,000 inhabitants  | First time   | 2-3 nights (weekend)                                 | Vlissingen  | January  | X                              |
| 16      | 11.01.2020 | G29/G          | Goes                                | 13:43     | 00:25:26    | 66                          | m          | Childless couple  | Couple + dog                         | Thuringia, Meiningen > town > 21,000 inhabitants  | For 5 years coming whenever there is time (more frequently than once a year)                     | 4-9 nights (7 days), sometimes 10+ nights (14 days)  | Colijnsplaat  | January, but also all over the year; Preferably in low-season        | X                              |
| 17      | 11.01.2020 | G30/31/32/33/G | Goes                                | 15:28     | 00:06:36    | 43, 11, 43, 8               | m, m, f, f | Family with 2 school children                           | Family (parents + 2 school children) | North Rhine-Westfalia, Essen > city > 547,000 inhabitants   | More frequently than once a year (once a month)  | 2-3 nights (weekend) + sometimes during the holidays | Colijnsplaat, owning a mobile house                     | All over the year  | X                              |
| 18      | 12.01.2020 | G/34/35/R      | Renesse, Strandpark de Zeeuwse Kust | 09:22     | 00:23:18    | 61, 53                      | m, f       | Family with adult children                              | Partner                              | North-Rhine-Westfalia, ung, Willich (triangel Düsseldorf, Krefeld, Mönchen-Gladbach > Town  | Once a year - more frequently (1-2 times a year)   | 2-3 nights (weekend)                                 | Renesse; before also Zoutelande, Westkapelle, (Ouddorp) | Only in low season   | X                              |
| 19      | 12.01.2020 | G/36/R         | Renesse, Strandpark de Zeeuwse Kust | 10:04     | 00:10:36    | /                           | f          | /   | /                                    | /   | /  | /  | /   | /  | /                              |
| 20      | 12.01.2020 | G/37/R         | Renesse, Strandpark de Zeeuwse Kust | 10:19     | 00:05:37    | 28                          | f          | Childless couple  | Partner                              | North-Rhine-Westfalia, Oberhausen > city > 211,000 inhabitants  | Every other year or less (on average every 2-3 years)  | 2-3 nights (weekend); usually 1-2 weeks              | Renesse; Burgh-Haaamstede                               | Usually high-season, spontaneous decision to come also in low-season | X                              |
| 21      | 12.01.2020 | G/38/39R       | Renesse, Strandpark de Zeeuwse Kust | 10:56     | 00:08:11    | 43, 43 (children 10 and 12) | m, f       | Family with 2 school children                           | Family (parents + 2 children)        | North Rhine-Westfalia, Oberbergischer Landkreis > village   | More frequently than once a year (2-3 times); G38 already for 20 years, G39 already for 40 years | 2-3 nights (weekend)                                 | Renesse   | Easter and autumn holidays, in between a weekend                     | X                              |
| 22      | 12.01.2020 | G40/B          | Brouwersdam                         | 12:20     | 00:07:03    | 60                          | m          | Unknown, but apparently independent from young children | Alone                                | North Rhine-Westfalia, Aachen > City > 247,000 inhabitants  | Derived from content: More than once a year  | Visit for a day                                      | Brouwersdam   | All year-round (Weather dependent)                                   | X + notes                      |
| 23      | 12.01.2020 | G41/B          | Brouwersdam                         | ca. 13:10 | ca. 10 min. | 60                          | m          | Unknown, but apparently independent from young children | Friends                              | North Rhine-Westfalia, 3-4 hours of driving; Kaiserlautern" (*Possible memory mistake in notes due to mixed up license plate cyphers! Assumed correct place of residence: Mönchen-Gladbach) | Derived from content: More than once a year  | Visit for a day                                      | Brouwersdam   | Weather dependent  | notes-based because unrecorded |

|    |            |             |  |           |             |            |         |   |  |  |  |   |  |  |                                |
|----|------------|-------------|--|-----------|-------------|------------|---------|---|--|--|--|---|--|--|--------------------------------|
| 22 | 12.01.2020 | G40/B       | Brouwersdam                            | 12:20     | 00:07:03    | 60         | m       | Unknown, but apparently independent from young children | Friends  | North Rhine-Westfalia, Aachen > City > 247,000 inhabitants   | Derived from content: More than once a year                        | Visit for a day   | Brouwersdam                                      | All year-round (Weather dependent)   | X + notes                      |
| 23 | 12.01.2020 | G41/B       | Brouwersdam                            | ca. 13:10 | ca. 10 min. | 60         | m       | Unknown, but apparently independent from young children | Friends  | North Rhine-Westfalia, 3-4 hours of driving: Kaiserslautern* (*Possible memory mistake in notes due to mixed up license plate cypher! Assumed correct place of residence: Mönchengladbach) | Derived from content: More than once a year                        | Visit for a day   | Brouwersdam                                      | Weather dependent  | notes-based because unrecorded |
| 24 | 12.01.2020 | G42/B       | Brouwersdam                            | 13:32     | 00:13:45    | 36         | m       | Family with children (presumably) under school-age      | Alone  | North Rhine-Westfalia, Neuss > city > 154,000  | More frequently than once a year (once per month)                  | 2-3 nights (weekend)  | Renesse  | All year round, weather dependent  | X                              |
| 25 | 18.01.2020 | G43/44/45/R | Renesse, IP                            | 10:10     | 00:11:54    | 70, 72, 32 | f, m, f | Family with adult children                              | Partner + adult child (who is just on a visit for a weekend) | North Rhine-Westfalia, Steele > Town > 17,000 inhabitants  | More frequently than once a year (4-5 times); already for 25 years | Parents: 10+ nights (4 weeks); Daughter: 2-3 nights (weekend, 2 nights) | Scharendijke, Roompot Vakantiepark, house owners | All year round for 25 years, but mostly in low season because house is rented in high season | X                              |
| 26 | 08.01.2020 | G46/D       | Domburg, Kinderspeeltuin Zvierelantijn | 15:23     | 00:07:15    |            | f       |   |  |  |  |   |  |  |                                |

| February |            |                   |                           |           |             |                            |                  |   |  |  |   |   |   |   |                                |
|----------|------------|-------------------|---------------------------|-----------|-------------|----------------------------|------------------|---|--|--|---|---|---|---|--------------------------------|
| Nr       | Date       | Code              | Place                     | Time      | Length      | Age                        | Sex              | Family Life-Cycle                                       | Travel Party   | Residence  | Visit Frequency   | Length of Stay  | Place of Stay   | Time of Travel  | Transcribed                    |
| 27       | 06.02.2020 | G47/48/M          | Middelburg, Zeeuws Museum | 14:05     | 00:11:22    | 25, 32                     | m, f             | Unknown, but apparently independent from young children | Brother & Sister   | Hessen, Frankfurt / Taunus > Village - Small Town                | First Time  | 4-9 nights (4 nights)                                       | Kattendijke   | February, chosen because of an extra education starting in March wherefore G47 wanted to enjoy one last holidays before | X                              |
| 28       | 06.02.2020 | G49/50/51/52/53/M | Middelburg, Zeeuws Museum | 15:04     | 00:21:16    | 40-60                      | m, f, m, m, f, m | Unknown, but apparently independent from young children | Friends (Dutch locals and Germans from the same surrounding) + dog | Hessen, Frankfurt surrounding > village - Town                   | G49: Since 1970 G50/51: More than once a year (2-3 times) since 2008 G52: Every other year or once a year (second time now, last year first time) | 2-3 nights (3 nights) (G50/51 come in summer for 7-16 days) | Hoofdplaat  | 50,51,53: All year round  | X                              |
| 29       | 19.02.2020 | G54/55/O          | Oostburg                  | 10:30     | 00:17:08    | 76, 73                     | m, f             | Family with adult children                              | Partner  | North Rhine-Westfalia, Cologne city > 1,046,000 inhabitants      | More than once per year (once a month); Come for already 40 years   | 4-9 nights (always one week)                                | Retranchement, Zomerdorp Het Zwin, house owners   | Every month all year-round  | X                              |
| 30       | 19.02.2020 | G56/57/O          | Oostburg                  | ca. 11:30 | ca. 18 min. | 60, 54                     | f, m             | Family with adult children                              | Partner + dog  | North Rhine-Westfalia, very rural area 20 km from Bonn > village | Once a year, to Zeeuws-Vlaanderen already for 22 years (were before on upper islands)   | 10+ nights (2 weeks)  | Nieuwvliet, Manege; Before that in Domburg, Westkapelle and Vrouwenpolder which then became too full for them | February  | notes-based because unrecorded |
| 31       | 19.02.2020 | G58/59/O          | Oostburg                  | 12:29     | 00:13:58    | 45, 45 (children 15 and 9) | f, m             | Family with school children                             | Family + dog   | Rhineland-Palatinate, Koblenz (vicinity) > village - town        | More frequently than once a year (5-8 times because they own a house); already for 15 years; winter holidays                                      | 4-9 nights (one week)                                       | Breskens, own holiday house   | When children are free (holidays, long weekends)  | X                              |

|                       |            |                      |                             |       |          |                                       |  |                               |   |   |   |   |  |  |                                 |
|-----------------------|------------|----------------------|-----------------------------|-------|----------|---------------------------------------|--|-------------------------------|---|---|---|---|--|--|---------------------------------|
| 32                    | 19.02.2020 | G60/61/62/63/64/65/O | Oostburg                    | 12:55 | 00:14:28 | 39, 35, 32, 29, 10, 6 (third child 7) | m, f, m, f, f, f                                       | Families with school children | a) Family + dog<br>b) Friends (also a family) | Rhineland-Palatinate, nearby Speyer / Weinstraße > Village - Smaal Town | a) Once a year or more frequently than once a year (in total already 4-5 times); winter holidays<br>b) First visit; winter holidays | 4-3 nights (5 nights, Monday to Saturday) | Nieuwvliet-Bad, Landal Greenpark                   | During the holidays, now first time winter holidays as they do not exist yet that long in Rhineland-Palatinate (otherwise Eastern, summer, autumn) | X                               |
| 33                    | 21.02.2020 | G66/S                | Sluis                       | 11:24 | 00:08:50 |                                       | f  |                               |   |   |   |   |  |  |                                 |
| 34                    | 21.02.2020 | G67/68/S             | Sluis                       | 11:36 | 00:14:32 | 68, 71                                | f, m   | Family with adult children    | Partner                                       | North Rhine-Westfalia, Cologne > city > 1,046,000 inhabitants           | Come since 1978   | 4-3 nights ("a good week")                | Breskens, own a holiday house                      | All year-round, preferably in low-season   | X                               |
| 35                    | 22.02.2020 | G69/70/W             | Duwerkerk, Watersnoodmuseum | 12:38 | 00:09:33 | 52, 57                                | f, m   | Family with adult child       | Partner                                       | North Rhine-Westfalia, Cologne > city > 1,046,000 inhabitants           | Every other year or less; already as a small child  | 2-3 nights (3 nights)                     | Dreischor  | February (because of carnival) (in the past only with child during summer)   | X                               |
| 36                    | 22.02.2020 | G71/72/W             | Duwerkerk, Watersnoodmuseum | 15:10 | 00:14:09 | 59, 58                                | f, m   | Family with adult child       | Partner                                       | North Rhine-Westfalia, surrounding of Cologne > village                 | Every other year or less (G72 came the first time 50 years ago)   | 2-3 nights (3 nights)                     | Renesse (hotel)                                    | Never during high-season to Zeeland, but they have to use holidays due to their jobs   | X                               |
| Total                 |            |                      |                             |       |          | 70+: 21%                              | Families w. children under school age: 15%             |                               | Family: 18%                                   | North Rhine-Westfalia; 73%  | First time: 12%   | 0-3 nights: 64%                           | Holidays   |  | 36 recorded interviews          |
| 36 tourist interviews |            |                      |                             |       |          | 50+: 58%                              | Families w. school children: 15%                       |                               | Partner: 54%                                  | Other federal states: 27%   | Every other year or less: 18%   | 4 nights +: 36%                           | Preferably in low-season                           |  | 33 transcribed interviews incl. |
| Average:              |            |                      |                             |       |          | 25-49: 36%                            | Families w. adult children: 27%                        |                               | Friends: 18%                                  |   | Once or more than once a year: 64%  |   | Only in low-season                                 |  | 2 with extra notes              |
| 00:14:23              |            |                      |                             |       |          | 18-24: 3%                             | Unknown, but app. independent from young children: 15% |                               | Alone: 3%                                     |   | Invalid, but presumably coming more than once a year: 6%  |   | Usually in summer                                  |  | 3 note-based interviews         |
|                       |            |                      |                             |       |          |                                       | Childless couple: 27%                                  |                               | Dog: 24%                                      |   |   |   | *no numbers because incomplete coincidence results |  |                                 |

Table 12. Tourist Interviews – Overview on interview details (nr, code, place, time, length), demographic data (age, sex, family life-cycle, place of residence) and travel behaviour data (travel party, residence, visit frequency, length of stay, time of travel) of 33 (of in total 36) tourist interviews

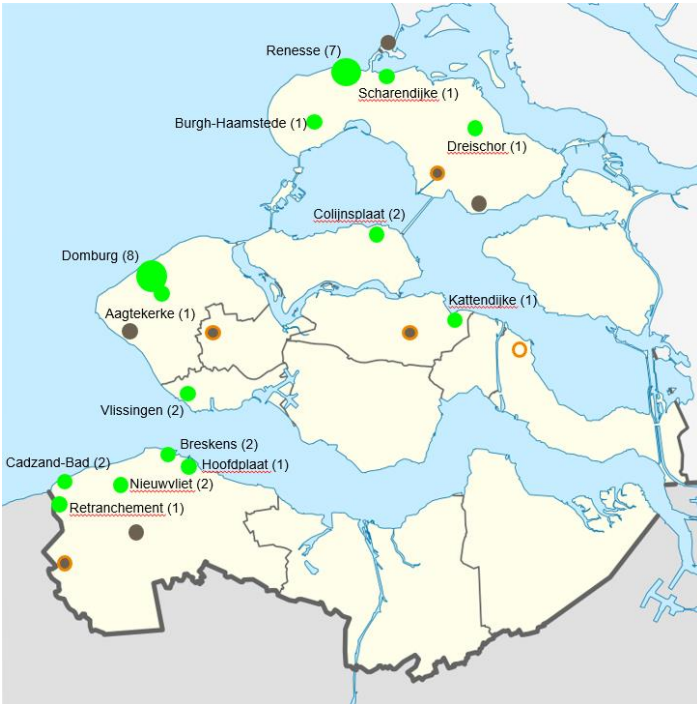


Figure 5. Location map of province Zeeland in the Netherlands. Adapted from Wikipedia website, by E. Frohne, 2009, retrieved from [https://nl.wikipedia.org/wiki/Bestand:Netherlands\\_Zeeland\\_location\\_map.svg](https://nl.wikipedia.org/wiki/Bestand:Netherlands_Zeeland_location_map.svg) Copyright 2009 by Wikimedia and Mediawiki

Figure 89 shows the places of stay in Zeeland of guest respondents (only coded interviews), indicated by green circle filling. Other circles indicate places of interview conduction.

Figure 90 shows interviewed tourists' places of residence in Germany (only including coded interviews without G41).

Figure 91 shows interviewed tourists' places of residence in Germany viewed in comparison to their length of stay in Zeeland. Red writing indicates a short stay of 0 to 3 nights, green writing indicates a longer stay of 4 nights and more. The digit combination x/y separates the number of respondents from the same place of residence with a short stay (x) from those with a long stay (y).



Figure 70. Positionskarte von Deutschland. Adapted from Wikipedia website, by NordNordWest, 2008, retrieved from [https://no.m.wikipedia.org/wiki/Fil:Germany\\_location\\_map.svg](https://no.m.wikipedia.org/wiki/Fil:Germany_location_map.svg) Copyright 2008 by Wikipedia

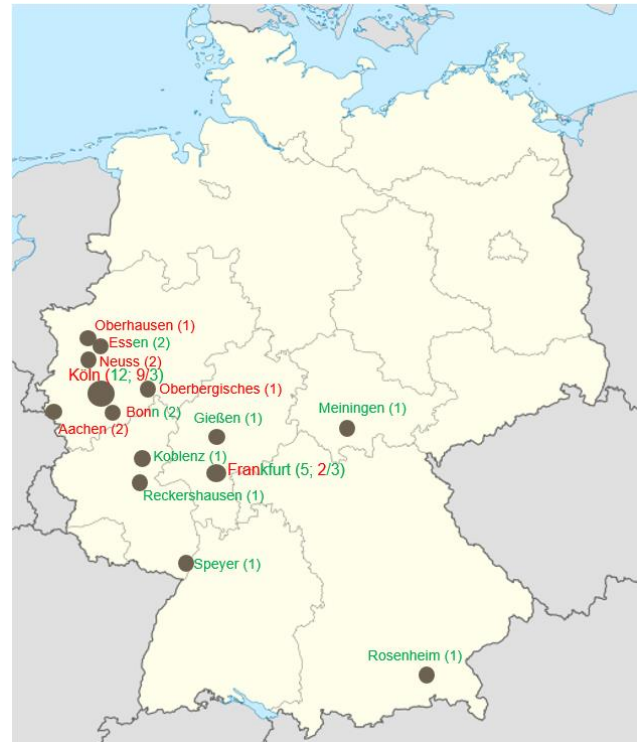


Figure 61. Positionskarte von Deutschland. Adapted from Wikipedia website, by NordNordWest, 2008, retrieved from [https://no.m.wikipedia.org/wiki/Fil:Germany\\_location\\_map.svg](https://no.m.wikipedia.org/wiki/Fil:Germany_location_map.svg) Copyright 2008 by Wikipedia



## November

| Date | Code       | Place  | Time                      | Length | Age     | Family Life-Cycle  | Travel Party   | Place of Residence   | Visit Frequency   | Length of Stay  | Place of Stay   | Time of Travel                                      | Transcribed   |   |
|------|------------|--------|---------------------------|--------|---------|--------------------|--|--|---|---|---|---|---|---|
| 1    | 19.11.2019 | IP.A/G | Goes, IP                  | 10:46  | 0:27:20 | a) 50+<br>b) 30-40 | a) Family with adult children OR childless couple<br>b) Family with child under school age | a) Family (with children under school age)<br>b) Partner + evtl. dog | Frequently North Rhine-Westfalia (Ruhr Area); Once Northern Germany and Waddensea, also once Southern Germany | More frequently than once a year (1-2 times / year)   | 4-3 nights and 10+ nights   | Wemeldinge, Yerseke, Kattendijke, Goes              | All year long; No different target groups within low season, but difference between high and low-season regarding family life-cycle | X |
| 2    | 21.11.2019 | ZV.B/D | Domburg, Zeeland Vakantie | 09:55  | 0:19:36 | not known          | a) Family with adult children OR childless couple<br>b) Family with child under school age | a) Partner (with children under school age)<br>b) Family + evtl. dog | Mostly North Rhine-Westfalia  | First visit (one time, e.g. over the weekend)<br>b) More frequently than once a year (usually "vaste gasten") | 2-3 nights or 4 to 9 days, can be over the weekend or during the week | 1. Domburg, 2. Oostkapelle (Surrounding of Domburg) | No different target groups within low season, but difference between high and low-season regarding family life-cycle                | X |

## December

| Date | Code       | Place  | Time                            | Length | Age      | Family Life-Cycle  | Travel Party  | Place of Residence   | Visit Frequency  | Length of Stay   | Place of Stay   | Time of Travel  | Transcribed   |   |
|------|------------|--------|---------------------------------|--------|----------|--|---|--|--|--|---|---|---|---|
| 3    | 12.12.2019 | TLC/M  | Middelburg, Tourist Information | 10:00  | 01:01:39 | All age groups, but especially 50+   | a) Family with child under school age<br>b) Older people with partner or with other family members (e.g. with mother) | a) Family with child under school age or someone from the older generation<br>b) Partner<br>c) Friends + evtl. dog | Mostly North Rhine-Westfalia, but there is an increasing number of people from beyond (Trier is mentioned) | Those owning a house or a caravan ("vaste gasten") come for sure 4 times / year; others come once in a while | Often short holidays of 1-3 days over the weekend;<br>Those coming from outside of NRW stay longer  | Mostly at the coast (from Cadzand up to the "Kop van Schouwen-Duiveland" and beyond), but they stay everywhere and come from everywhere; Assumption that those who live in Middelburg do so for special events in the city or for profiting from the general infrastructure and vicinity to other places like the beach | Esp. Frequently over carnival from North Rhine-Westfalia, New Year's Eve, evtl. Christmas; No different target groups within low season, but difference between high and low-season regarding family life-cycle | X |
| 4    | 13.12.2019 | IP.EY  | Yerseke, IP                     | 10:00  | 00:42:21 | 65+  | a) Older people with partner or with other family members (e.g. with mother)  | Partner  | Mostly North Rhine-Westfalia, Ruhr Area, meaning Köln, Dortmund, Essen                                     | not known  | To Yerseke just 1 day   | Mostly Walcheren (Zoutelande, Domburg, Oostkapelle)   | Difference between high and low-season  | X |
| 5    | 19.12.2019 | IP.D/Z | Zierikzee, IP                   | 13:20  | 01:05:54 | a) as soon as they don't have to work anymore<br>b) 20-30+<br>c) Kitesurfers: middle aged (with or without children) up to end of 50 | a) Mostly older family with adult children OR childless couple<br>b) Some less family with child under school age     | a) Partner<br>b) Some less family with child under school age + evtl. dog  | North Rhine-Westfalia  | not known  | a) A weekend (1 night, 2-3 nights)<br>b) During the week (4-9 nights), the latter is a trend due to arrangements of certain parks;<br>c) To cities only 1 day | Many in the parks (e.g. Roompot); Come from everywhere (listing places on Schouwen-Duiveland, Walcheren and Zuid-Beveland)  | No different target groups within low season, but difference between high and low-season  | X |

## January

| Date | Code       | Place  | Time        | Length | Age      | Family Life-Cycle  | Travel Party  | Place of Residence  | Visit Frequency  | Length of Stay              | Place of Stay                        | Time of Travel   | Transcribed   |   |
|------|------------|--------|-------------|--------|----------|--------------------|---|---|--|-----------------------------|--------------------------------------|--|---|---|
| 6    | 18.01.2019 | IP.F/R | Renesse, IP | 10:30  | 00:55:26 | a) 55+<br>b) 25-40 | a) Older family with adult children OR childless couple<br>b) Many families with child under school age | a) Partner<br>b) Esp. families with children under school-age!!<br>c) Friends (much less) + evtl. dog | North Rhine-Westfalia, Ruhr Area and Aachen (in general around 3.5 hours of driving away), some from more Southern parts | Often more than once a year | Mostly 2-3 nights (over the weekend) | Renesse, Burgh-Haamstede, Noordwelle, Westerschouwen, Nieuw-Haamstede, Zierikzee | During the week more older people, at weekends more families; Small peaks around Christmas and carnival | X |

| February                       |            |        |                                      |        |                  |   |   |  |  |   |  |   |   |   |
|--------------------------------|------------|--------|--------------------------------------|--------|------------------|---|---|--|--|---|--|---|---|---|
| Date                           | Code       | Place  | Time                                 | Length | Age              | Family Life-Cycle   | Travel Party  | Place of Residence   | Visit Frequency  | Length of Stay  | Place of Stay  | Time of Travel  | Transcribed   |   |
| 7                              | 05.02.2020 | IP.GIV | Zoutelande, IP (about IP Vlissingen) | 09:45  | 00:40:28         | a) Older, middle age (35-65)<br>b) Not many families with very young children in Vlissingen, more families with school children during holidays | a) Family with adult children OR childless couple<br>b) Parents with school children (during holidays) and parents with very young children | a) Partner<br>b) Families with school children<br>c) (Friends & Groups)  | Surrounding of 3.5 hours, so mostly North Rhine-Westfalia, sometimes also from other regions | Mostly loyal and back-coming guests, many of them having a house ('vaste gasten')<br>> So often more than once a year | 1 day (in Vlissingen)<br>> Day tourism<br>Maybe 2-3 days when living in Koudekerke;<br>In Zoutelande 4-3 nights often (1 week) | Close vicinity (Walcheren), a bit also on Schouwen-Duiveland but esp. in Zeeuws-Vlaandren (esp. From the parks) due to the 'Westerschelde-Ferry' (nice day attraction)<br>a) Often have their own house<br>b) Families with small children are often on the parks | b) Mostly during the holidays; Around <b>winter holidays</b> more children seen (though could also be Dutch)<br>c) Mostly between Christmans & New Year's Eve | X |
| 8                              | 05.02.2020 | IP.H/S | Sluis, IP                            | 10:15  | 00:50:28         | a) 50+  | a) Family with adult children OR childless couple<br>b) Parents with school children (during holidays)                                      | a) Partner<br>b) Families with school children (during holidays)   | Mostly North Rhine-Westfalia, esp. Aachen  | Many loyal guests, also 'vaste gasten', already coming for 20 or 30 years -> So often at least once a year            | 4-3 days (one week on average)<br>In Sluis 1 day   | Breskens, Nieuwvliet, Cadzand (places at the coast)   | a) Low season<br>b) If low season, then during holidays (but few); more children seen during <b>winter holidays</b>   | X |
| Total<br>8 employee interviews |            |        |                                      |        | Total<br>6:03:12 | Average<br>0:45:24  | 50+ : 86%<br>25-49: 50%<br>18-24: 13%   | Families w. children under school age: 75%<br>Families w. school children: 25%<br>Families w. adult children: 75%<br>Childless couple: 75% | Family: 88%<br>Partner: 100%<br>Friends: 38%<br>Dog: 63%                                     | North Rhine-Westfalia: 100%<br>Other federal states: 50%  | First time: 12.5%<br>Every other year or less: 12.5%<br>Once or more than once a year: 75%<br>Invalid results: 25%             | 0-3 nights: 63%<br>4 nights +: 75%<br>Day tourist to specific destinations: 38%   | 8 recorded interviews<br>0 note-based interviews  |   |

Table 13. Employee interviews – Overview on interview details (nr, code, place, time, length), demographic data (age, family life-cycle, place of residence) and travel behaviour data (travel party, residence, visit frequency, length of stay, time of travel) of 8 employee interviews

## APPENDIX H – Phases of Result Analysis

The analysis method consisted of three phases which techniques were derived and adapted from quantitative benefit segmentation studies by authors like Sarigöllü and Huang (2005), Davis and Sternquist (1987), Gitelson and Kerstetter (1990), Frochot and Morrison's (2013) review on benefit segmentation applications, and Haley' (1968) advices on benefit segmentation. Market results were then segmented on benefits sought. The analysis phases are briefly described and are followed by the belonging tables and schemes. The following history should be considered:

- Numbers: Interviewed guests G1 to G72 whereby G36 (36), G46 (46) and G66 (66) are missing as interviews did not get coded
- Letters: Interviewed employees; Letters correspond to the abbreviations as used in the text (D = Domburg, G = Goes, M = Middelburg, R = Renesse, S = Sluis, V = Vlissingen, Y = Yerseke, Z = Zierikzee)
- **Bold print:** In Analysis phase 1 (and recurring in analysis phase 3), codes that were mentioned to be a main reason to come to Zeeland are highlighted by bold-print
- Colours: Specific characteristics stood out in their assumed impact on respondents' holiday-decision making and related benefits sought; Subsequently, guests with these characteristics got assigned a specific colour for visualizing possible connections between these characteristics and spotted segments:
  - Length of Stay < 4 nights (G5/6 who were invited for a weekend to Zeeland but
  - Length of Stay > 3 nights who want to come back and stay longer the next time)
  - Families Water Sportsmen

Analysis phase 1: Consists of a list of all retrieved tangible and intangible benefits that got ordered the way they match thematically with each other (possible first visible segment patterns); Respondents who got coded on these benefits are listed at the side; Also, benefits sought that were mentioned in interviews with tourists were compared to those mentioned by employees for re-checking interview validity and sample sufficiency in retrospect (triangulation). The conformity between these two groups is visible in the density in which letters and numbers occur together for one benefit sought

Analysis phase 2: Consists of a scheme for tracking connections between tangible and intangible benefits which lead to the depiction of clusters (potential market segments)

Analysis phase 3: Consists of the creation of close-ups schemes from potential segments that resulted out of analysis phase 2 for simplifying their analysis and description whereby also other segmentation criteria, meaning demographic, geographic and behavioural characteristics, were considered so far this appeared meaningful. The finally described potential segments from the text may only be sub-segments in the schemes.

The analysis documents should be understood primarily as work tools for the researcher, the focus remains further on the written description of the potential market segments as only the connection with the spoken word provides accurate validity to the schemes. The original documents can be requested from the researcher ([gnte0001@hz.nl](mailto:gnte0001@hz.nl)).

Analysis Phase 1: Found Codes of tangible Benefits and the Related Respondents

|   |  |        |          |            |  |
|---|--|--------|----------|------------|--|
| Wellness Facilities                                     | 1,2,3,4;G;D;16,17;M;2;R;(3,4,35);37,38<br>39;42;43,44;(59);71,72;  |        |          |            |  |
| General Infrastructure                                  | 3,4,5,6,7,8;10,11;12,13;G;D;1<br>6,17;18,19;20,21;22,23;24;M;2;<br>V;25,26;27,28;30-<br>33;34,35;37,38;42;43,44,45;R;<br>49-<br>52;54,55;56,57;58,59;67,68;71,7<br>2;W;S;                          | 11;24  |          |            |  |
| Hiking Infrastructure                                   | 1,2;10,12,13;G;D;M;2;25,26;43,44;<br>V;1;S;<br>*improvable   |        |          |            |  |
| Cycling Infrastructure                                  | 1,2,3,4;17,8;G;D;19,19;22,23;M;2;V;29<br>38;39;43,44;R;47;54,55,59;1,6,8;<br>V;S;  |        |          |            |  |
| Vicinity to Home  | 1,2;3,4,5,6;7,8;14,15;16,17;22,23<br>24;M;25,26;27,28;34,35;40;4<br>1;42;43,44;R;50,51;54,55;58,5<br>9;69,70;71,72;  |        |          |            |  |
| Space   | 6;3,4;10;20;2;V;R;51,52;67,68;V;S;   |        |          |            |  |
| Sea Air   | 3,4;10;12,13;16,17;G;20,21;M;<br>2;V;25,26;27,28;29;34,35;43<br>.44;R;50,51,53;67,68;S;  |        |          |            |  |
| Sea Air   | 3,4;10;12,13;16,17;G;20,21;M;<br>2;V;25,26;27,28;29;34,35;43<br>.44;R;50,51,53;67,68;S;  |        |          |            |  |
| (unspoiled) Nature                                      | 1,2,3,4;5;7,8;9;10,11;12,13;<br>G;D;14,15;16,17;18,19;20,21;2<br>2,23;24;M;2;V;25,26;27,28;2<br>9;30-33;34,35;37;38-<br>39;40;41;42;R;49-<br>53;54,55;56,57;58,59;60-<br>65;67,68;69,70;71,72;V;S; |        |          |            |  |
| Seaside (and Lakes)                                     | 1,2;3,4;5;7,8;9;10,11;12,13;<br>G;D;14,15;16,17;18,19;20,21;2<br>2,23;24;M;2;V;25,26;27,28;2<br>9;30-33;34,35;37;38-<br>39;40;41;42;R;49-<br>53;54,55;56,57;58,59;60-<br>65;67,68;69,70;71,72;V;S; |        |          |            |  |
| Wind  | 1,2;D;22,23;M;40;41;42;44,45;R;S   |        |          |            |  |
| Good Weather  | 12,13;18,19;V;25,26;29;40;4<br>1;42;49-53;58,59;   |        |          |            |  |
| <b>1) Benefit Segmentation</b>                          | Physical products<br>Availability of suitable products<br>Tangible benefits  | People | Packages | Programmes |  |
| Childhood Experiences                                   | A,8;19,22;   |        |          |            |  |
| Deltaworks  | 10;12,13;(M);25,26;(29);(38,<br>39);(42);43,44;R;(50,51);(58,<br>57);(71,72);(V)   |        |          |            |  |
| Dutch Style (inner and outer architecture / city style) | 7,8;11,12;18,19;20;22,23;25,2<br>6;(34,35);43,44;2;R;47,48;<br>50,51;58,59;70,71;S;  |        |          |            |  |
| Small Shops & Boutiques                                 | 16,17;18,19;22,26;49-<br>53;71,72;   |        |          |            |  |
| Cities  | 3,4,5,6,7,8,9;10,11;12,13;G;<br>6,17;18,19;20,21;22,23;M;2;<br>5,26;27,28;29;30-<br>33;34,35;36,39;43,44,45;R;<br>47,48;49;53;54,57;58,59;60-<br>65;67,68;69,70,71,72;V;S;                         |        |          |            |  |
| Entertainment Facilities for Young Adults               | (47);49;   |        |          |            |  |
| Entertainment Facilities for Children                   | 10,11;G;18,19;M;(Z);3<br>0-33;34,39;R;58,59;60-<br>65;V;S;   |        |          |            |  |
| Entertainment Facilities for Children                   | 10,11;G;18,19;M;(Z);3<br>0-33;34,39;R;58,59;60-<br>65;V;S;   |        |          |            |  |
| Open Fire Place   | B;51,52;   |        |          |            |  |
| Accommodation   | 3,4;D;16,17;20;29;30-<br>33;54,55;56,59;67,68;   |        |          |            |  |
| Campsite  | 22,23;M;29;30-<br>33;34,35;37,38;39;(40);(41);<br>R;59,59;69,69;71,72;S;   |        |          |            |  |
| Dog-Friendly Rules                                      | 10;G;D;16,17;20;M;2;R;34,24*<br>;50,51;56,57;58,59;60,61;<br>*complained about not<br>cleaning up dog messes   |        |          |            |  |
| <b>1) Benefit Segmentation</b>                          | Physical products<br>Availability of suitable products<br>Tangible benefits  | People | Packages | Programmes |  |
| Biological Food   | M;2;56/57  |        |          |            |  |
| Mussels (Food)  | 5,6;G;16,17;M;2;25,26;29;<br>4,35;38,39;R;52;57,69,70;V;   |        |          |            |  |
| Fish (Food)   | 1,2,7,8;G;D;16,17;M;2;25,26;<br>9;43,44,45;50,51,57,58,59;60<br>65;67,68;69,70;V;S;  |        |          |            |  |
| Other Regional / Country-specific Food                  | 1,2;10,16,17;M;2;27,28;50,5<br>1,53;56,57;60-65;S;   |        |          |            |  |
| Oyster Beds   | V;34,35;V;   |        |          |            |  |
| Monuments / Sights                                      | 12,13;(17);20,21;22,23;24;2;<br>5,26;29;43,44,45;47,48;58,5<br>9;65;S;   |        |          |            |  |
| Museums / Exhibitions                                   | 12,13;G;(17);24;M;25,26;43,4<br>4;R;47,48;(50,51,52);60-<br>65;69,70;71,72;V;S;  |        |          |            |  |
| Museums / Exhibitions                                   | 12,13;G;(17);24;M;25,26;43,4<br>4;R;47,48;(50,51,52);60-<br>65;69,70;71,72;V;S;  |        |          |            |  |
| Animals-watching/horse riding                           | 10,11;16,19;22,23;25,21,33;<br>34,35,38,39;43,44,45;R;50,5<br>1,54,55;56,57,58,59;65;67,68<br>;71,72;V;S;  |        |          |            |  |
| Mills   | 10,40;50,51;64;69,70;S;  |        |          |            |  |
| Boat Trip   | G;3,4;V;25,26;(30-<br>33);54,55;56,59;60-65;V  |        |          |            |  |
| Ships & Harbours  | 7,8;20,21;24;V;25,26;43;60-<br>65;V;S;   |        |          |            |  |
| <b>1) Benefit Segmentation</b>                          | Physical products<br>Availability of suitable products<br>Tangible benefits  | People | Packages | Programmes |  |

Table 14.1. List of retrieved tangible benefits and respondents who got coded on these benefits; Bold-printed respondents = high relative importance assigned to benefit

|  |   |        |                    |            |
|--|---|--------|--------------------|------------|
| Holiday Park                               | F,M,Z(3;29)(43,44,45)<br>(54,55)49-65   |        |                    |            |
| Seaside Resort                             | 3;4;5;13<br>(see mentioned interests)   |        |                    |            |
| Seasonal Price Benefit                     |   |        | %A,B(7;14,35;42;   |            |
| Arrangements                               |   |        | 5;1;9;18;19;20;0;0 |            |
| Inspiration Points                         | 10;11;12;13;24;43-<br>45;54;55;56;59;60-<br>65;74;8;169;70  |        |                    |            |
| Hospitality                                | 5;1;2;0;22;23;25;26;29;0  |        |                    |            |
| Dutch Mentality                            | 5;1;12;13;16;17;2;0;22;23;27;29<br>(29;3;0-33;44;45;49-53;  |        |                    |            |
| Visitor Mix (emptiness)                    | 4;2;3;4;15;6;18;19;2;36;42<br>2;0;9;2;28;29;33;M;Z;W;25;26<br>27;31;32;33;38;39;<br>34;35;36;37;38;39;40;41;42;43-<br>45;1;15;16;17;18;19;20;21;22;<br>7;1;7;8; |        |                    |            |
| Visitor Mix (Type of Tourists)             | 22;23;34;35;56;57;  |        |                    |            |
| Visitor Mix (meet friends / acquaintances) | 7;8;9;22;23;43;44;49-<br>53;54;57;58;59;57;4;9;   |        |                    |            |
| <b>1) Benefit Segmentation</b>             | Physical products   | People | Packages           | Programmes |
|  | Availability of suitable products   |        |                    |            |
|  | Tangible benefits   |        |                    |            |

|                                |                                   |        |          |  |
|--------------------------------|-----------------------------------|--------|----------|--|
| No Carnival                    |                                   |        |          | M;R;1;67;68;69;70;71;72;   |
| Guided City Tour               |                                   |        |          | 12;13;M;Z;R;5;   |
| Unspecific Events              |                                   |        |          | 10;<br>11;12;13;18;19;20;24;M;Z;44;45;<br>R;50;51;54;55;56;59;67;68;70;7<br>1;                       |
| Market                         |                                   |        |          | 12;13;18;19;20;21;M;Z;25;26;30-<br>32;43;44;45;R;48;49-<br>53;54;55;56;57;58;59;60-<br>65;66;70;W;S; |
| Strað-Riding                   |                                   |        |          | 2;43;44;45;R;  |
| Sinterklaas                    |                                   |        |          | 10;11;Z;(50);67;68;W;S   |
| <b>1) Benefit Segmentation</b> | Physical products                 | People | Packages | Programmes   |
|                                | Availability of suitable products |        |          |  |
|                                | Tangible benefits                 |        |          |  |

Table 14.2. List of retrieved tangible benefits and respondents who got coded on these benefits; Bold-printed respondents = high relative importance assigned to benefit

Analysis Phase 1: Found Codes of Intangible Benefits and the Related Respondents

| w/ll                              |                     | 12;13;(17);(20);2;4;25;26;43;44;R;6-4;S  |
|-----------------------------------|---------------------|--|
| History (in general)              |                     | 13;G;22;23;24;M;25;26;43;44;R;47;62;63;71;72;S   |
| Dutch Culture                     |                     | 1;2;5;6;7;8;9;10;11;12;13;G;16;17;18;19;20;22;23;M;2;25;26;29;34;35;43;44;R;47;48;50;51;52;58;59;60-65;67;68;69;70;71;72;W;S   |
| Explore                           |                     | 3;4;5;6;(7;8);10;12;13;6;18;19;20;22;23;24;M;2;25;26;29;34;35;43;44;R;47;48;49;48-53;54;55;56;57;58;59;60-65;69;70;71;72;W;S   |
| Photography                       | 20;23               | 10;34;35;  |
| Cycling                           |                     | 1;2;3;4;7;8;9;10;11;12;13;G;D;14;15;16;17;18;19;20;22;23;M;2;25;26;29;34;35;43;44;R;47;48;49;54;55;56;59;67;68;69;70;71;72;W;S   |
| Hiking & walking                  |                     | 1;2;3;4;7;8;9;10;11;12;13;G;D;14;15;16;17;18;19;20;22;23;M;2;25;26;29;34;35;43;44;R;47;48;49;54;55;56;59;67;68;69;70;71;72;W;S   |
| Animals                           |                     | 10;11;18;19;22;25;31;33;34;35;38;39;43;44;45;R;50;51;54;55;56;57;58;59;65;67;68;71;72;W;S  |
| Enjoy Nature                      |                     | 1;2;3;4;5;6;7;8;9;10;11;12;13;G;D;14;15;16;17;18;19;20;21;22;23;24;(M);(2);(7);25;26;27;28;29;30-33;34;35;(37;38;39);41;42;43;44;R;49-53;54;55;56;57;58;59;60-65;67;68;69;70;71;72;W;S |
| Reduced Travel Time (Convenience) |                     | 1;2;3;4;5;6;7;8;14;15;16;17;22;23;24;M;25;26;27;28;34;35;40;41;42;43;44;R;50;51;54;55;58;59;69;70;71;72;   |
| 1) Benefit Segmentation           | Hobbies             | Interests  |
|                                   | Hobbies & Interests |  |
|                                   | Intangible benefits |  |

| Low Price  |                     | 1;4;R;2;3;5;C;D;E;20;4;25;26;68;69;70;71;72;S   |
|--|---------------------|---|
| Quality (what you have, do it well; reliability) |                     | 3;4;5;6;16;47;20;48;25;26;27;28;34;35;43;44;R;47;48;49;50;  |
| Sustainability(?)                                |                     | 1;11;18;22;23;M;2;25;26;29;34;35;43;44;R;47;48;49;50;   |
| Camping  |                     | 22;23;M;2;25;26;29;34;35;43;44;R;47;48;49;50;   |
| Fun  |                     | 11;G;18;43;M;22;23;33;38;39;R;47;48;49;54;55;56;57;67;68;V;S  |
| Entertainment by Events                          |                     | 3;4;18;19;22;23;18;19;20;24;M;2;25;26;27;28;43;44;R;49;51;54;55;69;70;71;72;W;S   |
| Shopping   |                     | 3;4;18;19;22;23;18;19;20;24;M;2;25;26;27;28;43;44;R;49;51;54;55;69;70;71;72;W;S   |
| Culinary   |                     | 1;2;3;4;10;11;12;13;G;D;14;15;16;17;20;21;22;23;M;2;25;26;27;28;29;30-33;34;35;37;38;39;41;42;43;44;R;49-53;54;55;56;57;58;59;60-65;67;68;69;70;71;72;W;S |
| Art  |                     | 7;8;10;12;13;G;21;24;26;M;2;V;25;26;27;41;42;43;44;R;50;51;54;55;57;58;71;72;W;S  |
| 1) Benefit Segmentation                          | Hobbies             | Interests   |
|  | Hobbies & Interests |   |
|  | Intangible benefits |   |

| Horseback Riding  | 56;57;  |           |
|---|---|-----------|
| Fishing   | 11;21;R;18;33;S   |           |
| Flying Model Airplanes  | 42;   |           |
| Beach- & Watersports (general)  | G;42;45;R;S   |           |
| Windsurfing   | 48;49;R   |           |
| Surfing ("may include also other forms than wave surfing due to usage as generic term") | 48;49;R;40;41;42;43;M;2;M;2;W;25;2;26;27;28;29;30;31;32;33;34;35;36;37;38;39;40;41;42;43;44;45;46;47;48;49;50;51;52;53;54;55;56;57;58;59;60;61;62;63;64;65;66;67;68;69;70;71;72;W;S |           |
| Sailing   | 22;23;24;40;41;42;43;44;45;   |           |
| Kitesurfing   | 22;23;24;40;41;42;43;44;45;   |           |
| Diving  | 22;23;24  |           |
| 1) Benefit Segmentation   | Hobbies   | Interests |
|   | Hobbies & Interests   |           |
|   | Intangible benefits   |           |

Table 15.1 List of retrieved intangible benefits and respondents who got coded on these benefits; Bold-printed respondents = high relative importance assigned to benefit

|  |  |  |
|--|--|--|
| Accessibility / Medical Care                                     |  | M;R  |
| Seaside Resort   |  | 12   |
| General Medical health   |  | 9, 4; 68; 6; 16, 17; 20, 21; 24; M; 25, 26; 27, 28; 29; 30, 33; 33, 40; 51, 53;                  |
| Specific Medical Health  |  | 18; 19; M; R; 27, 30; 35<br>*had health problems that for which no health care was sought though |
| Pampering - Wellness Facilities are no Necessity but may be used | 1, 2; 15, 17; M; 37; 38, 39; 43, 44; 51; 57; 59;   |  |
| Pampering (Wellness facilities are a necessity)                  | 3, 4; M; 43;   |  |
| Wellbeing  | 9, 2; 9, 4; 12, 13; 15, 17; 20, 21; 24; M; 25; 26; 27; 28; 29; 30, 33; 33; 39, 40; 51, 53;                             |  |
| Flee & Recover from Everyday Life                                | 9, 2; 9, 4; 6; 10; 14, 15; 16; 18; 19; 20; 21; 24; 25; 26; 27; 28; 29; 30; 33; 33; 39; 40; 51, 53; 57; 59;             |  |
| Relaxation   | 1, 2; 3; 4; 5; 11; 12; 13; 14; 15; 16; 17; 18; 19; 20; 21; 24; 25; 26; 27; 28; 29; 30; 33; 33; 39; 40; 51, 53; 57; 59; |  |
| Tranquility  | 9, 2; 9, 4; 5; 6; 10; 14; 15; 16; 18; 19; 20; 21; 24; 25; 26; 27; 28; 29; 30; 33; 33; 39; 40; 51, 53; 57; 59;          |  |
| 1) Benefit Segmentation  | Wellness health  | Medical health   |
|  | Health   |  |
|  | Intangible benefits  |  |

|                            |   |   |
|----------------------------|---|---|
| Dog-Owner                  |   | 10; G; D; 16, 17; 20; M; 25; 26; 27; 28; R; 30, 31; 51; 56, 57; 58, 59; 60, 61;<br>*complained about not cleaning up dog owners |
| Parents / Grandparents     | 1, 2; 10, 11; G; D; 18, 19; M; 2; E; 25; 30; 33; 38, 39; 43, 45; R; 54, 55; 56, 57; 58, 59; 60-65; V; |   |
| Other Family Relationships | 16, 17; 18, 19; G; 27, 28; 37; 67, 68; H;   |   |
| 1) Benefit Segmentation    | Obligation-connected family   | Obligation-connected other roles  |
|                            | Family obligations  |   |
|                            | Intangible benefits   |   |

|                             |  |   |   |
|-----------------------------|--|---|---|
| Atmosphere                  | 7, 8; D; 20; 22, 23; M; 2; 29; R; 48;          |   |   |
| Nostalgia                   | G; D; 19; 72;                                  |   |   |
| Familiarity                 | D; 19; 37; 38, 39; 43, 44, 45; 56, 57; 58, 59; |   |   |
| "Geselligkeit"              |  | 7, 8; 9; 17; 20; 22, 23; D; E; 25, 26; 42, 44; F; 45; 52; 56, 57; 58, 59; 67, 68; G; H; |   |
| Celebrating Personal Events |  |   | 3, 4; (9); 7, 8; 16, 17; 20; E; 25, 26; 27, 28; |
| 1) Benefit Segmentation     | Emotional needs                                | Personal needs  | Status needs                                    |
|                             | Other personal motivators                      |   |   |
|                             | Intangible benefits                            |   |   |

Table 15.2. List of retrieved intangible benefits and respondents who got coded on these benefits; Bold-printed respondents = high relative importance assigned to benefit

Analysis Phase 2: Connections between tangible and intangible benefits and clusters of similarities that might describe market segments

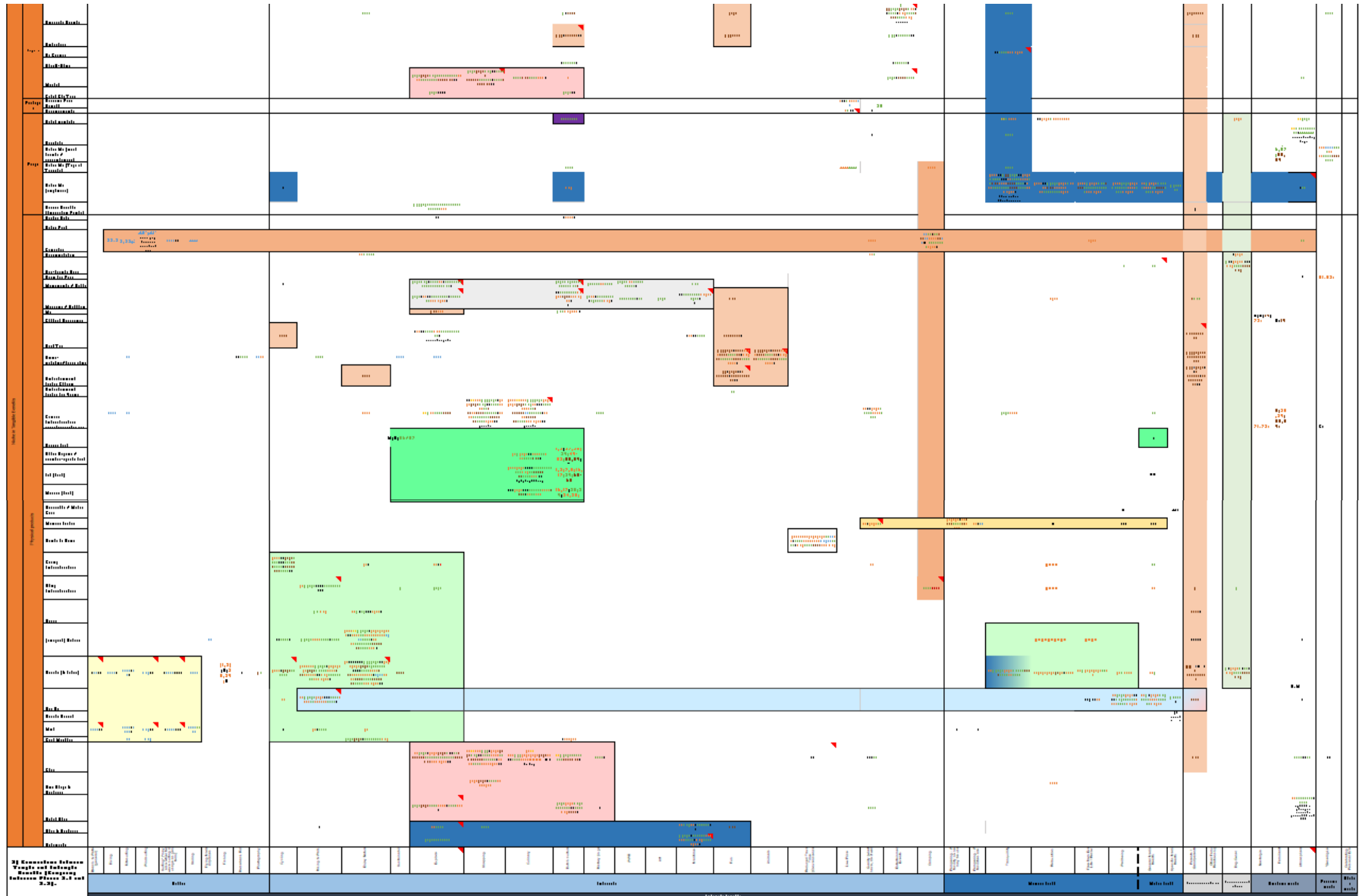


Table 16. Scheme for tracking connections between tangible and intangible benefits which lead to the depiction of clusters (potential market segments or, within these, potential sub-segments). X-axis: Intangible benefits; Y-axis: Tangible benefits; Each cluster got framed and assigned an individual colour whereby the order of benefits on the axes did not always allow that benefits of one potential segments are all located next to each other, therefore partly being found scattered in the scheme. Red triangles are notes that got added by the researcher, providing information about content from an interview that should be considered when reading the number / letter of the respondent in the respective cell.



Analysis Phase 3: Benefit Pattern in Detail

Seaside and Nature-Seekers

| Age                        | 50+                    | 5,6,7,8,10,12,13,14,15,16,17,18,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,54,55,56,57,58,59,60,61,62,63,64,65,66,67,68,69,70,71,72       | 7,8,12,23,29,43,44,54,55,67,68,69,70,71,72;V;S;  |  |  |  |  |  |  |
|----------------------------|------------------------|---|--|--|--|--|--|--|--|
|                            | 25-49                  | 1,2,3,4,16,17,18,19,27,28,30,31,37,38,39,42,47,48,49,53,58,59,65;   | 1,2,3,4,18,19,38,39,47,58,59   |  |  |  |  |  |  |
| Physical Products          | Cycling Infrastructure | 1,2,3,4,16,17,18,19,27,28,30,31,37,38,39,42,47,48,49,53,58,59,65;V;S;   | 1,2,3,4;G;D;18,19,27,28,30,31,37,38,39,42,47,48,49,53,58,59,65;V;S;  |  | 1,2;V  | 3,4;G;V;   | 1,2,3,4,18,19,38,39,47,58,59   | 7,8,12,23,29,43,44,54,55,67,68;  |  |
|                            | Hiking Infrastructure  | 1,2,18,19,27,28,30,31,37,38,39,42,47,48,49,53,58,59,65;V;S;   | 1,2,18,19,27,28,30,31,37,38,39,42,47,48,49,53,58,59,65;V;S;  | 1,2,18,19,27,28,30,31,37,38,39,42,47,48,49,53,58,59,65;V;S;  |  | 18   | 12,19  | 1,2  |  |
|                            | Space                  | G;3,4,18,19,27,28,30,31,37,38,39,42,47,48,49,53,58,59,65;   |  | 18,28,58,59;   | 3,4,18;G;2,12;V;R;3,12,5;  |  |  |  |  |
|                            | (unspoiled) Nature     | 4,2,3,4,16,17,18,19,27,28,30,31,37,38,39,42,47,48,49,53,58,59,65;V;S;   | 37,43,44;V;  | 18,19,27,28,44,45;R;54,55;   | 1,2,3,4,15,16,17,18,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,54,55,56,57,58,59,60,61,62,63,64,65,66,67,68,69,70,71,72;     |  |  |  |  |
|                            | Seaside (& Lakes)      | 4,2,3,4,16,17,18,19,27,28,30,31,37,38,39,42,47,48,49,53,58,59,65;V;S;   | 1,2,3,4;G;18,19,40,67,68;  | 1,2,3,4,7,8,13,18,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,54,55,56,57,58,59,60,61,62,63,64,65,66,67,68,69,70,71,72;V;S; | 1,2,3,4,15,16,17,18,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,54,55,56,57,58,59,60,61,62,63,64,65,66,67,68,69,70,71,72;V;S; |  | 38,59  |  |  |
|                            | Sea Air                | 3,4,18,19,27,28,30,31,37,38,39,42,47,48,49,53,58,59,65;V;S;   | 3,4  | 3,4,18,19,27,28,30,31,37,38,39,42,47,48,49,53,58,59,65;V;S;  |  |  |  |  |  |
|                            | Wind                   | 4,2,3,4,16,17,18,19,27,28,30,31,37,38,39,42,47,48,49,53,58,59,65;V;S;   | H  | 1,2;H;22,23;   | 1,2;   |  |  |  |  |
|                            | Good Weather           | 12,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,54,55,56,57,58,59,60,61,62,63,64,65,66,67,68,69,70,71,72;                                   |  |  | 12,19,18,19,19;V;25,26,27,28,29,58,59;   |  |  |  |  |
| Total                      |                        | 1,2,3,4,7,8,12,13,14,15,16,17,18,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,54,55,56,57,58,59,60,61,62,63,64,65,66,67,68,69,70,71,72;V;S; | 1,2,3,4,7,8,13,18,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,54,55,56,57,58,59,60,61,62,63,64,65,66,67,68,69,70,71,72;V;S; | 4,2,3,4,16,17,18,19,27,28,30,31,37,38,39,42,47,48,49,53,58,59,65;V;S;  | 1,2,18,22,23;H;2,38,39,55,57;  | 3,4,15,16,17,18,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,54,55,56,57,58,59,60,61,62,63,64,65,66,67,68,69,70,71,72;V;S; | 1,2,3,4,16,17,18,19,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,54,55,56,57,58,59,60,61,62,63,64,65,66,67,68,69,70,71,72; | 5,6,7,8,10,12,13,14,15,16,17,18,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,54,55,56,57,58,59,60,61,62,63,64,65,66,67,68,69,70,71,72; |  |
| Seaside and Nature Seekers | Total                  | Cycling   | Hiking & Walking   | Enjoy Nature   | Sustainability   | Explore  | 25-49  | 50+  |  |
|                            |                        | Interests   |  |  |  |  |  | Age  |  |

Table 17. Close-up scheme from a cluster that seemed to describe seaside and nature-seekers

Tranquillity-Seekers

| Place of Residence   | City  | 4,5;14,15;V;S   |   |   | 4,5;14,15;V;S   |   |   |                               |                                     |
|----------------------|---|---|---|---|---|---|---|-------------------------------|-------------------------------------|
| Time of Travel       | Preferably in leisure   | 24;25;26;29;49;44;67;68;  |   |   | 24;25;26;29;49;44;67;68;  | 24;29;49;44;67;68;  | 24;25;26;29;49;44;  | 24;67;68;                     |                                     |
|                      | Specifically in leisure   | 3,4;5;6;18,14;18,19;34,35;71,72   |   |   | 3,4;5;6;18,14;34,35;71,72   | 3,4;5;6;18,71,72  | 34,35   | 3,4;5;6;18;34,35;71,72        |                                     |
| Programme            | No Carnival   | M;R;67;68;69;70;71,72;  |   |   | M;R;67;68;69;70;71,72;  |   |   |                               |                                     |
| People               | Hospitality   | 5,6;28;29;30;35;26;29;C   |   | 5,6;28;29;30;35;26;29   |   |   |   |                               | 5,6;28;29;30;35;26;29;M;64;64-69;68 |
|                      | Visitor Mix (Tourist Type)  | 22,29;34;35;56;57;  |   | 22,29   |   | 22,29   |   |                               |                                     |
|                      | Visitor Mix (Emptiness)   | 1,2;3,4;5;6;7;8;9;10;11;12;13;14;15;16;17;18;19;20;21;22;23;24;25;26;27;28;29;30;31;32;33;34;35;36;37;38;39;40;41;42;43;44;45;46;47;48;49;50;51;52;53;54;55;56;57;58;59;60;61;62;63;64;65;66;67;68;69;70;71;72; |   | 58,51;  | 1,2;3,4;5;6;7;8;9;10;11;12;13;14;15;16;17;18;19;20;21;22;23;24;25;26;27;28;29;30;31;32;33;34;35;36;37;38;39;40;41;42;43;44;45;46;47;48;49;50;51;52;53;54;55;56;57;58;59;60;61;62;63;64;65;66;67;68;69;70;71;72; | 1,2;3,4;5;6;7;8;9;10;11;12;13;14;15;16;17;18;19;20;21;22;23;24;25;26;27;28;29;30;31;32;33;34;35;36;37;38;39;40;41;42;43;44;45;46;47;48;49;50;51;52;53;54;55;56;57;58;59;60;61;62;63;64;65;66;67;68;69;70;71;72; | 1,2;3,4;5;6;7;8;9;10;11;12;13;14;15;16;17;18;19;20;21;22;23;24;25;26;27;28;29;30;31;32;33;34;35;36;37;38;39;40;41;42;43;44;45;46;47;48;49;50;51;52;53;54;55;56;57;58;59;60;61;62;63;64;65;66;67;68;69;70;71;72; |                               | D,29                                |
|                      | Dutch mentality   | 5,6;12,13;16;17;20;22;23;27;28;29;30-33;44,45;69-70;  |   | 22,29;49,44;  | 5,6;28;27,28  |   |   | 5,6;12,13;28;27,28;49-53;     | 5,6;12,13                           |
| Seaside (& Lake)     | 1,2;3,4;5;6;7;8;9;10;11;12;13;14;15;16;17;18;19;20;21;22;23;24;25;26;27;28;29;30;31;32;33;34;35;36;37;38;39;40;41;42;43;44;45;46;47;48;49;50;51;52;53;54;55;56;57;58;59;60;61;62;63;64;65;66;67;68;69;70;71;72; | 1,2;3,4;5;6;7;8;9;10;11;12;13;14;15;16;17;18;19;20;21;22;23;24;25;26;27;28;29;30;31;32;33;34;35;36;37;38;39;40;41;42;43;44;45;46;47;48;49;50;51;52;53;54;55;56;57;58;59;60;61;62;63;64;65;66;67;68;69;70;71;72; |   | 3,4;18;12,13;16;17;20;22;23;30;39;49,44;52;55,57  | 3,4;18;14,15;16,17;20;27;   | 1,2;28;34,35  | 3,4;14,15;16,17;18,19;21;34,35;   | .                             |                                     |
| Total                |   |   | 1,2;3,4;5;6;7;8;9;10;11;12;13;14;15;16;17;18;19;20;21;22;23;24;25;26;27;28;29;30;31;32;33;34;35;36;37;38;39;40;41;42;43;44;45;46;47;48;49;50;51;52;53;54;55;56;57;58;59;60;61;62;63;64;65;66;67;68;69;70;71;72; | 1,2;3,4;5;6;7;8;9;10;11;12;13;14;15;16;17;18;19;20;21;22;23;24;25;26;27;28;29;30;31;32;33;34;35;36;37;38;39;40;41;42;43;44;45;46;47;48;49;50;51;52;53;54;55;56;57;58;59;60;61;62;63;64;65;66;67;68;69;70;71;72; | 1,2;3,4;5;6;7;8;9;10;11;12;13;14;15;16;17;18;19;20;21;22;23;24;25;26;27;28;29;30;31;32;33;34;35;36;37;38;39;40;41;42;43;44;45;46;47;48;49;50;51;52;53;54;55;56;57;58;59;60;61;62;63;64;65;66;67;68;69;70;71;72; | 1,2;3,4;5;6;7;8;9;10;11;12;13;14;15;16;17;18;19;20;21;22;23;24;25;26;27;28;29;30;31;32;33;34;35;36;37;38;39;40;41;42;43;44;45;46;47;48;49;50;51;52;53;54;55;56;57;58;59;60;61;62;63;64;65;66;67;68;69;70;71;72; | 1,2;3,4;5;6;7;8;9;10;11;12;13;14;15;16;17;18;19;20;21;22;23;24;25;26;27;28;29;30;31;32;33;34;35;36;37;38;39;40;41;42;43;44;45;46;47;48;49;50;51;52;53;54;55;56;57;58;59;60;61;62;63;64;65;66;67;68;69;70;71;72; | 7,8;D;28;29;30;31;32;33;R;48; |                                     |
| Tranquillity Seekers | Total   | Reduced Travel Time (Convenience)   | Dutch Culture   | Tranquillity  | Flee from Everyday Life / Recovery  | Wellbeing   | Relaxation  | Atmosphere                    |                                     |
|                      |   | Interests   |   |   | Wellness Health   |   |   | Emotional Needs               |                                     |

Table 18. Close-up scheme from a cluster that seemed to describe tranquillity-seekers

City-Visitors

|                   |                         |  |  |  |  |   |  |   |                |               |
|-------------------|-------------------------|--|--|--|--|---|--|---|----------------|---------------|
| Age               | 50+                     | 5,6,7,8,10,12,13,24,20,21,22,23,25,26,29,34,35;<br>5,10,41;(43,44);49-53;(54,55);56,57,67,68,69,70,71,72   |  |  |  | 5,6,10,12,13,20,25,26,29,34,35<br>(43,44);Z,R;49-53;67,68,69,70,71,72 |  |   |                |               |
|                   | 25-43                   | 1,2,3,4,16,17,18,19,27,28,30,31,37,38,39,42,47<br>48,49-53;58,59,60-65;  |  |  |  | 11,16,17,47,48,49-53;58,59,60-65;                                     |  |   |                |               |
| Programmes        | Market                  | 12,13,18,19,20,21;M,Z;25,26,30-33;43,44,45;R;48,49-53;50,54,55,56,57,58,59,60-65;69,70;V,S;  | 12,13,18,19,20,21,25,26,43,44,45,49-52,54,55,56,57,58,59,60-65;V,S;  | 12,13,18,19,20,21;M,Y;25,26,30-33;(38,39);43,44,45;R;56,57,58,59,60-65;V,S;  | 25,26,60-65;67,68,69,70;V;   | 50  |  |   |                |               |
|                   | Guided City Tour        | 12,13;M,Z,R,S;   | 12,13;M,Z,R,S;   |  |  | 12,13;R,S;  |  |   |                |               |
| Physical Products | Monuments / Sights      | 12,13;(17);20,21,22,23,24;Z;25,26,29,43,44,45,47,48,58,59,65;S;  | 12,13,20,21;G;22,23,24;Z;25,26,43,44,45,47,48,58,59,60-65;S;   |  |  | 12,13,20,21,22,23,29,47,48,60-65;S;                                   | 13,22,23,24,25,26                      |   |                |               |
|                   | Museums / Exhibition    | 12,13;G;(17);24;M;25,26,43,44;R;47,48;(50,51,52);60-65;69,70,71,72;V,S;  | 12,13;G;24;M,Z;25,26,43,44;R;47,48,60-65;69,70,71,72;V;  |  |  | M,R;43,44,47,48;50,51,52,61,62,69,70;71,72;S<br>*50*                  | 13;24;M;25,26,43,44;R;60-65;69,70,71;S |   |                |               |
|                   | Cities                  | 3,4,5,6,7,8,9,10,11,12,13;G;16,17,18,19,20,21,22,23;M,Z;25,26,27,28,29;30-33;34,35;38,39,43,44,45;R;47,48,49-53;56,57,58,59,60-65;67,68,69,70,71,72;V,S; | 3,4,12,13;G;16,17,18,19,20;M,Z;29,30-33;38,39,43,44,45,47,48,56,57,58,59,60-65;69,70,71,72;V,S;  | 3,4,5,6,7,8,9,10,11;G;16,17,18,19,20,21;M,Z;25,26,27,28,29;30-33;38,39,43,44,45;R;49-53;56,57,67,68,71,72;V,S;   | 12,5,6;<br>7,8;9;10,11;14,15;16,17;18,19,24;M;Z;25,26,27,28;49-52;V,S;<br>*Domburg*  | 5,6,10,12,13,44,45,47,48,58,59,60-65;S;                               | 22,23;M                                | 22,23;Z,R;48;   | G,M,Z;Y,R;V,S  | G,M;Y,R;V,S   |
|                   | Small Shops & Boutiques | 16,17,18,19;Z;25,26,49-53;71,72;   |  | 16,17,18,19;Z;25,26,49-53;71,72;   |  |   |  |   |                |               |
|                   | Dutch Style             | 7,8,11,12,18,19,20;22,23;25,26;(34,35);(43,44);Z,R;47,48;50,51;58,59;70,71;S;  | 12,13,18,19,22,23;(34,35);Z;47,48,60-65;69,70,71,72;V,S;   |  |  | 12,13,17,18;20,21,22,23,25,26;Z,R;47,48;50,51;58,59;S;                | M                                      | 7,8;22,23;25,26;R;47,48;<br>* (esp. with Christmas lightning, also mentioned in general by G50 and G58) |                |               |
| Total             |                         | 3,4,5,6,10,12,13;G;18,19;20;22,23;24;M;Z;Y;25,26,29,30-33;34,35,38,39,44,45;R;47,48,49-53;54,55,56,57,58,59,60-65;69,70,71,72;V,S;                       | 3,4,5,6,7,8,9,10,11,12,13;G;16,17,19,20;M,Z;Y;25,26,27,28,29;30-33;34,35;37,38,39,43,44,45;R;50,51;54,55,56,57,58,59,60-65;67,68,71,72;V,S | 1,2,3,4,5,6;<br>7,8,9,10,11,12,13;G,D;14,15,16,17,18,19,20,21,24;M,Z;Y;25,26,27,28,29;30-33;34,35;38,39,42,43,44,45;R;49-52;56,57,58,59;60-65;67,68,69,70,71,72;V,S; | 1,2,5,6,7,8,9,10,11,12,13;G;16,17,18,19,20,22,23;M,Z;Y;25,26,29,30-34,35;43,44;R;47,48;50,51,52,58,59,60-65;67,68,69,70,71,72;V,S; | 13;G;22,23,24;M;25,26,43,44;R;47,62,63,71,72;S                        | 7,8;D;20,22,23;M;Z;29;R;48;            | G,M,Z;Y,R;V,S   | G,M;Y,R;V,S    |               |
| City-Visitors     | Total                   | Explore  | Shopping   | Culinary   | Dutch culture  | History (in general)  | Atmosphere                             | Visit for a Day   | Coastal Place  |               |
|                   |                         | Interests  |  |  |  |   |  | Emotional Needs   | Length of Stay | Place of Stay |

Table 19. Close-up scheme from a cluster that seemed to describe city-visitors

Families

| Families          | Time of Travel   | Coming to Zeeland since Having Children   |   | Coming to Zeeland since Being a Child   |  | In Holidays  |                                     | In Winter Holidays   |             |  |             |
|-------------------|--|---|---|---|--|--|-------------------------------------|--|-------------|--|-------------|
|                   |  | Mail  | Frequency   | Mail  | Frequency  | Mail   | Frequency                           | Mail   | Frequency   |  |             |
|                   |  |   | 43,44,54,55,56,57,58,59,60-65,67,68   |   | G,D;19;49;72   |  | 38,39,58,59,60-65 ~ add employer    |  | 58,59;60-65 |  | 58,59;60-65 |
|                   |  |   |   |   |  |  |                                     |  |             |  |             |
| Programmes        | Unspecific Events  | 10, 11,12,13;18,19,20,24;M2,4,44,45;R;54,55,56,59,67,68,70,71;  | 10, 19,58,59  |   | 10,2;58,59;  |  | 18,19;                              |  |             |  |             |
|                   | Sinterklaas  | 10,11,2;(58);47,69;W;S  | 10,11   |   | 10,11,2;58;  |  | 10,11,47,68;                        |  |             |  |             |
| Physical Products | Holiday Park   | F,M,Z;(38,39);(43,44,45);(54,55);60-65  | M,Z;(38,39);(43,44,45);(54,55);60-65  |   |  |  |                                     |  |             |  |             |
|                   | Museums / Exhibition   | 12,13;G;(17);24;M;25,26,43,44;R;47,48;(50,51,52);60-65;69,70,71,72;W;S;   |   | 12,13;20,21;G;22,23;24;Z;25,26,43,44,45,47,48,58,59,60-65;S;                  |  | 60-65;   |                                     |  |             |  |             |
|                   | Mills  | 10,48;50,51;64;69,70;S;   |   | 10;64;69,70   |  | 10,48;50,51;69,70;S  |                                     |  |             |  |             |
|                   | Boat Trip  | G;24;Z;1;25,26;(30-33);54,55,58,59,60-65;W;   | (30-33);54,55;60-65   | 24;25,26;Z;7;54,55,58,59,60-65;W;   |  | 54,55;64,65;W  |                                     |  |             |  |             |
|                   | Animal-watching/horse riding   | 10,11,18,19,22,23;Z;25,21,33,34,35,38,39,43,44,45;R;50,51,54,55,56,57,58,59,69;67,68,71,72;W;S;   | 10,11,18,19,25,28,29,43,45,58,59;   |   |  | 10,11,18,19,25,33;34,35,38,39;43,44,45;R;50,51,54,55,56,57,58,59;67,68,71,72;(V) |                                     | 10,11,18,19,25,33;34,35,38,39;43,44,45;R;50,51,54,55,56,57,58,59;67,68,71,72;(V) |             |  |             |
|                   | Entertainment Facilities Children  | 10,11;G;18,19;M;(Z);30-33;38,39;R;58,59,60-65;W;S;  | 10,11;G;18,19;M;2;30-33;38,39;R;57,58,59,60-65;W;S;   |   |  | 11;G;18,19;M;(Z);30-33;38,39;R;57,58,59,60-65;(V);S;                             |                                     |  |             |  |             |
|                   | Space  | G;3;4;10;20;2;Y;R;8;1;52;47,68;W;S;   | 47,68;W   |   |  |  |                                     |  |             |  |             |
|                   | (unspoiled) Nature   | 1,2,3,4;5;6;7,8;9;10,11;12,13;G;D;14,15;16,17;18,19;20,21;22,23;24;M;2;12,25,26;27,28;29;30-33;34,35;37,38-39;40;41;42;R;49-53;54,55,56,57;58,59;60-65;67,68;69,70;71,72;W;S; | 67,68;W   |   |  |  |                                     |  |             |  |             |
|                   | Sea Air  | 3,4,10,12,13;16,17;G;2;8;2;1;M;2;1;25,26;27,28;29;34,35;37;43,44;R;50,51,52;67,68;S;  | 67,68   |   |  |  |                                     |  |             |  |             |
|                   | Seaside (& Lakes)  | 1,2,3,4;5;6;7,8;9;10,11;12,13;G;D;14,15;16,17;18,19;20,21;22,23;24;M;2;12,25,26;27,28;29;30-33;34,35;37,38-39;40;41;42;R;49-53;54,55,56,57;58,59;60-65;67,68;69,70;71,72;W;S; | 11;G;M;1;20-33;54,55,58,59  |   |  |  |                                     |  |             |  |             |
| Cities            | 3,4,5,6,7,8,9;10,11,12,13;G;16,17,18,19;20,21,22,23;M;2;5,24,27,28;29;30-33;34,35;37,40;41;42;43;44;45;46;47;48;49-53;54,55,58,59;60-65;67,68,69,70,71,72;W;S; | 30-33   |   |   |  |  |                                     |  |             |  |             |
| Total             |  | (1,2),10,11;G;D;18,19;M;Z;1;25;30-33;38,39;43,45;R;8,45,56,57,58,59,60-65;67,68;W;S;  | 3,4,5,6,10,12,13;G;18,19;2;8;2;22,23;24;M;2;12,25,26;27,28;29;30-33;34,35,37,40;41;42;43;44,45;R;47,48;49;53;54,55,56,57,58,59;60-65;69,70,71,72;W;S; | 10,11;G;18,19;M;(Z);30-33;38,39;R;47,48;49;54,55,56,57,58,59,60-65;67,68;W;S; | 10,11,18,19,25,33;34,35;38,39;43,44,45;R;50,51,54,55,56,57,58,59;67,68,71,72;(V) | G;D;19;72;   | D;19;37;38,39;43,44,45,54,57,58,59; |  |             |  |             |
|                   | Total  | Parents / Grandparents  | Explore   | Dutch culture   | Fun  | Animals  | Nostalgia                           | Familiarity  |             |  |             |
|                   |  | Restrains-connected family roles  | Interests   |   |  |  | Emotional needs                     |  |             |  |             |

Table 20. Close-up scheme from a cluster that seemed to describe families

### Guests living nearby

|                      |                   |   |  |   |   |   |
|----------------------|-------------------|---|--|---|---|---|
| Physical Products    | Seaside (& Lakes) | 1,2,3,4,;5,6,7,8,9;10,11,12,13;G,D:14,15,16,17;18,19,20,21,22,23,24;M,Z;Y;25,26,27,28;29-30-33;34,35;37,38-39;40,41,42;R;49-53,54,55,56,57,58,59,60-65;67,68;69,70;71,72;V,S; |  | 1,2,3,4,5,6,7,8,9;10,11,12,13;G,D:14,15,16,17,18,19,21,22,22,23;(M),(Z),(Y);25,26,27,28,30-33;34,35,37,38,39;R;41,42;49-53,54,55,56,57,58,59,60-65;67,68,69,70;71,72;V,(S); |   |   |
|                      | Vicinity to Home  | 1,2,3,4,5,6,7,8,14,15,16,17,22,23,24;M;25,26;27,28,34,35;40,41,42,43,44;R;50,51,54,55;58,59;69,70,71,72;  | 1,2,3,4,5,6,7,8,14,15,16,17,22,23,24;M;25,26,27,28,34,35;40,41,42,43,44;R;50,51,54,55,58,59,69,70,71;    |   | 1,2,3,4,5,6,7,8,24,14,15,16,17,22,23;M;R;34,35,40,41,42,43,44;54,55;69,70,71,72<br><i>town a house</i>  | 25,26,58,59;  |
|                      | Total             |   | 1,2,3,4,5,6,7,8,14,15,16,17,22,23,24;M;25,26;27,28,34,35;40,41,42;43,44;R;50,51,54,55;58,59;69,70,71,72; | 1,2,3,4,5,6,7,8,9,10,11,12,13;G,D:14,15,16,17,18,19,20,21,22,23,24;(M),(Z),(Y);25,26;27,28,29,30-33;34,35,37,38,39;41,42;43,44;R;49-53,54,55,56,57,58,59,60-65              | 1,2,3,4,5,6,7,8,9;G,D;24,14,15,16,17,18,19;22,23;M,Z;R;30-33;34,35,37,38,39,40,41,42,43,44,45,54,55;56,57,67,68;69,70,71,72;V,S;<br><i>town a house</i> | 10,11,12,13;G;20,21;M;R;25,26,27,28,29,47,48,49;53,58,59,60-65; |
| Nearby-living Guests | Total             | Reduced Travel Time (Convenience)   | Enjoy Nature   | North Rhine-Westphalia (NRW)  | Other Federal States  |   |
|                      |                   | Interests   |  | Place of Residence  |   |   |

Table 21. Close-up scheme from a cluster that seemed to describe guests living nearby

### Long-Staying Guests

|                     |                      |   |  |  |   |   |  |   |   |                              |                      |
|---------------------|----------------------|---|--|--|---|---|--|---|---|------------------------------|----------------------|
| Physical Products   | Monuments / Sights   | 10,10;(17);20,21,22,23,24;25,26,27,40,44,45,47,48,51,54,55,S;   | 10,10,20,21,22,23,24,25,26,40,44,45,47,48,51,54,55,S;  | 60-65;   | 10,10,20,21,22,23,29,47,49,60-65,S;   | 10,22,23,24,25,26;  | 10,10;(20);24,25,26,40,44,45,S;  |   |   |                              |                      |
|                     | Museums / Exhibition | 10,10;(17);24;M;25,26,40,44;R;47,48;(59),51,52,60-65,69,70,71,72;V,S;   | 10,10;G;24;M;25,26,40,44;R;47,48,60-65,69,70,71,72;V,S;  | M;25,26,40-45,65,70,71,72;R;V;                                     | M;R;40,46,47,49,50,51,52,61,62,S;   | 10,24;M;25,26,40,44;R;61,62,63,70,71,S;   | 25,26,44,45;R;4,6;   | 10,10;  | G;40-45;  |                              |                      |
|                     | Ships & Harbours     | 7,8,20,21,24;W;25,26,40,44-45;V,S;  | 24,25,26;  | 7,8,20,21,24;W;25,26,40,45;S;                                      |   |   |  |   |   |                              |                      |
|                     | Boat Trip            | G;24;2;V;25,26;(30-33);84,55,58,59,60-65;W;   | G;24;2;V;25,26;(30-33);84,55,58,59,60-65;W (more interest than parallel line)                    | A;24;D;25,26;  |   |   |  |   | (30-33);84,55,60-65;  |                              |                      |
|                     | DeNetworks           | 10,10,10;(10);25,26;(29);(30,31);40,44;R;50,51;(54,57);(71,72);(V)  | 10,10,25,26,40,44;   | 10,10,10;(10);25,26;(29);(30,31);40,44;R;50,51;(54,57);(71,72);(V) |   |   |  |   |   |                              |                      |
| Total               |                      | 3,4,5,6,(7,8);10,12,13;G;11,14,15,20,21,22,23,24;M;Z;25,26,27,28,29,30-33;34,35,37,38,39,40,41,42,43,44,45,54,55,56,57,58,59,60-65,69,70,71,72;V,S; | 7,8;10,10,10;(10);20,21,24;M;Z;25,26;(29,30);40,44;R;49,50,51,52,59,60-65;67,68,69,70,71,72;V,S; | 50,51,67,68,69,70,71,72;V,S;                                       | 10,20,21,22,23,24;M;Z;25,26,40,44;R;47,48,49,50,51,52,59,60-65;67,68,69,70,71,72;V,S; | 10,10;(17);20,21,22,23,24;M;Z;25,26,40,44;R;47,48,49,50,51,52,59,60-65;67,68,69,70,71,72;V,S; | 3,4,6,10,11,12,13,16,19,20,24;M;Z;25,26,27,28,40,44;R;50,51,54,55,58,59,60-65,69,70,71,72;V,S; | 1,2,10,11;G,D;18,19;M;Z;25,26,27,28,40,44;R;50,51,54,55,58,59,60-65,69,70,71,72;V,S;<br><i>town a house</i> | 10,11,12,13;G;20,21;M;R;25,26,27,28,29,47,48,49;53,58,59,60-65; |                              |                      |
| Long-Staying Guests | Total                | Explore   | Maritime   | Dutch culture  | History (in general)  | WWII  | Art  | Entertainment by Events   | Parents / Grandparents  | North Rhine-Westphalia (NRW) | Other Federal States |
|                     |                      |   |  |  |   |   |  |   | Restrains-connected family roles                                | Place of Residence           |                      |

Table 22. Close-up scheme from a cluster that seemed to describe long-staying guests (> 3 overnight stays)

Health Tourists

|                   |                              |  |   |  |   |  |  |  |  |  |   |  |  |
|-------------------|------------------------------|--|---|--|---|--|--|--|--|--|---|--|--|
| Time of Travel    | Holidays                     | {18,33};58,59,68-65;   |   |  |   |  |  |  |  |  |   |  |  |
|                   | Usually in summer            | 7,8,16,17,20,21,37;  |   |  |   |  | 16,17,28   | 16,17,20,21,37;  | 16,17,20,21;   | 16,17,20,21;   |   |  |  |
|                   | Preferably in low-season     | 24,25,26,29,43,44,67,68;   |   |  |   |  | 24,67,68;  | 24,25,26,43,44,67,68;  | 24,25,26,43,44   | 24,25,26,43,44;  | 18,67,68;   |  |  |
|                   | Only in low-season           | 3,4,5,6,10,11;18,19;33,35,71,72  |   |  |   |  | 3,4,5,6;10,11,35,71,72   | 3,4,10,23,71,72  | 3,4,5,6,23,34,35,71,72   | 3,4,10,23  |   |  |  |
| People            | Visitor Mix (Emptiness)      | 8,12,23,40,51,61; 98,99,100,101,102,103,104,105,106,107,108,109,110,111,112,113,114,115,116,117,118,119,120,121,122,123,124,125,126,127,128,129,130,131,132,133,134,135,136,137,138,139,140,141,142,143,144,145,146,147,148,149,150,151,152,153,154,155,156,157,158,159,160,161,162,163,164,165,166,167,168,169,170,171,172; |   |  |   |  | 1,2,3,4,15,16,18,19,12,13,16,17,20,21,22,23,24,25,26,29,34,35,43,38,39,40,41,54,55,67,68,59,54,55,67,68,71,72; | 1,2,3,4,10,16,17,20,21,38,39,43,44,58;74,75;                               | 1,2,3,4,12,13,16,17,20,21,22,23,24,25,26,29,34,35,43,44,58;                | 3,4,10,16,17,20,25,26,27,28,29,30,33,43,44,58,59,60;             | 18,19,67,68   |  |  |
|                   | Accessibility / Medical Care | M&R  |   |  |   |  |  |  | A  |  | M&R   |  |  |
| Physical Products | Wellness Facilities          | 1,2,3,4,6,9,10,11,12,13,14,15,16,17,18,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,54,55,56,57,58,59,60,61,62,63,64,65,66,67,68,69,70,71,72;  | 3,4,6,16,17,58                                  | 1,2,16,17,18,19,33,43,44,58;74,75;                         | 3,4,6,42;                                       | G  | 3,4,6  | 3,4,6  | 3,4,6  |  |   |  |  |
|                   | Seaside Resort               | 6,4,40,13<br>(see median interval)   |   |  |   |  |  |  |  |  | 133   | Integrated though as important for general travels in Zealand            |  |
|                   | Sea Air                      | 3,4,6,9,10,11,12,13,14,15,16,17,18,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,54,55,56,57,58,59,60,61,62,63,64,65,66,67,68,69,70,71,72;  | 3,4,6,16,17,18,19,33,34,35,37,43,44,5;          | 1,2,16,17,18,19,33,34,35,37,43,44,58;74,75;                | 3,4,6,42;                                       |  |  | 3,4,10,23,37;  | 3,4,10,12,13,16,17,20,21,22,23,24,25,26,27,28,29,34,35,43,44,58,59,60;     | 3,4,10,16,17,20,21,22,23,24,25,26,27,28,29,34,35,43,44,58,59,60; | 18,67,68,5;   | 3,4,6,10,12,13,16,17,20,21,22,23,24,25,26,27,28,29,34,35,43,44,58,59,60; |  |
| Total             |                              | 1,2,3,4,7,8,10,11,12,13,14,15,16,17,18,19,20,21,22,23,24,25,26,27,28,29,30,31,32,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,54,55,56,57,58,59,60,61,62,63,64,65,66,67,68,69,70,71,72;  | 3,4,5,6,16,17,20,21,25,26,27,28,34,35,40,42,55; | 1,2,16,17,18,19,33,34,35,43,44,58;74,75;                   | 3,4,6,42;                                       | 1,2,3,4,15,16,18,19,12,13,16,17,20,21,22,23,24,25,26,29,34,35,43,38,39,40,41,54,55,67,68,59,54,55,67,68,71,72; | 3,4,6,9,10,12,13,16,17,20,21,22,23,24,25,26,27,28,29,34,35,43,44,58,59,60;                                     | 3,4,6,9,10,12,13,16,17,20,21,22,23,24,25,26,27,28,29,34,35,43,44,58,59,60; | 3,4,6,9,10,12,13,16,17,20,21,22,23,24,25,26,27,28,29,34,35,43,44,58,59,60; | 18,19,67,68,5;   | Had health problems that for which no health care was sought though | 3,4,5,6,10,11,16,17,21,22,23,24,35,43,44,58,59,60;                       |  |
| Health Tourism    | Total                        | Hiking & Walking   | Quality (reliability)                           | Pampering - Wellness facility no necessity but may be used | Pampering - Wellness facilities are a necessity | Relaxation   | Flee from Everyday Life / Recovery   | Wellbeing  | General Medical  | Specific Medical Health  | Time of Travel  |  |  |

Table 23. Close-up scheme from a cluster that seemed to describe health tourists

## Campers

|   |                                |  |  |   |          |  |   |  |  |  |
|---|--------------------------------|--|--|---|----------|--|---|--|--|--|
| Packages                                    | Seasonal Price Benefit         | %A;B;20;34,35;42;  |  | %G;D;20;34,35;42;                         |          |  |   |  |  |  |
|   | Arrangements                   | 5,6;9;18,19;20;C;D   |  | 9;20;M;Z                                  |          |  |   |  |  |  |
| People                                      | Visitor Mix (Type of Tourists) | 22,23;34;35;56,57;   |  | 24,25;54,57;                              |          |  |   |  |  |  |
| Physical Products                           | Campsites                      | 22,23;M;29;30-33;34,35;37,38,39;(40),(41);R;58,59;69,69;71,72;S; | 22,23;M;29;30-33;34,35;37,38,39;R;58,59;68,69;71,72;S;           |   | 22,23    | 22,23;39                                 | 40;41<br>*no camping due to issues of availability, cars & vicinity | 22,23;M;R  | 22,23                                    | 71,72;   |
|   | Total                          |  | 22,23;M;29;30-33;34,35;37,38,39;(40),(41);R;58,59;68,69;71,72;S; | %A;B;20;C;D;E;34,35;34,25;42;54,57;58,59; | 22,23;R; | 22,23;Z;34;42;45;R;S;<br>*only in summer | 40;41;R;  | %D;22,23;34;M;Z;R;<br>(only in summer)   | 22,23;34,25;44,45;S;<br>(only in summer) | 1,2;3,4;10;14,15;16,17;18,19;20,21;24;29;37,38,39;43,44;54,55;67,68;69,70;71,72; |
| <b>Campers (&amp; other accommodations)</b> | Total                          |  | Camping  | Low Price                                 | Diving   | Kitesurfing                              | Windsurfing   | Surfing* (*may include alr rather farm than wave surfing due to usage or generic term) | Sailing                                  | Flee from Everyday Life / Recovery   |
|   |                                |  | Interests  |   |          | Hobbies                                  |   |  |  | Wellness Health  |

Table 24. Close-up scheme from a cluster that seemed to describe campers and other accommodation-related statements

## Water Sports Enthusiasts

|                          |                   |   |                                |         |                                      |             |   |  |                 |
|--------------------------|-------------------|---|--------------------------------|---------|--------------------------------------|-------------|---|--|-----------------|
| Physical Products        | Seaside (& Lakes) | 1,2;3,4;5,6;7,8;9;10,11;12,13;G;D;14,15,16,17;18,19;20,21;22,23,24;M;Z;Y;25,26;27,28;29;30-33;34,35;37;38-39;40,41;42;R;49-53;54,55;56,57;58,59;60-65;67,68;69,70;71,72;Y;S | G;42;R;(S);                    | 22,23;R | 22,23;Z;42;R                         | 40,41;R;(S) | D;22,23;M;Z;R;(S)   | 22,23                                    | (1,2);R;38,39;S |
|                          | Sea Air           | 3,4;10;12;13;16;17;G;20,21;M;Z;Y;25,26;27,28;29;34,35;37;43,44;R;50,51,53,67,68;S   |                                |         |                                      |             |   |  |                 |
|                          | Wind              | 1,2;D;22,23;M;40;41;42;44,45;R;S  | 42,45;R;(S)                    |         | 22,23;Z;42,45;R                      | 40,41;R;(S) | D;22,23;M;Z;(S)   | 22,23;44,45                              |                 |
|                          | Good Weather      | 12,13;18,19;Y;25,26;29;40;41;42;49-53;58,59;  |                                |         | 42                                   | 40,41       |   |  |                 |
|                          | Total             |   | G;42,45;R;S                    | 22,23;R | 22,23;Z;42,45;R;S<br>*only in summer | 40,41;R     | 8;D;22,23;35;M;Z;R<br>*only in summer   | 22,23;34,35;44,45;S;<br>(only in summer) | (1,2);R;38,39;S |
| Water Sports Enthusiasts | Total             |   | Beach- & Watersports (general) | Diving  | Kitesurfing                          | Windsurfing | Surfing* (*may include also other forms than wave surfing due to usage as generic term) | Sailing                                  | Fishing         |
|                          |                   |   | Hobbies                        |         |                                      |             |   |  |                 |

Table 25. Close-up scheme from a cluster that seemed to describe water sports enthusiasts



Guests with Maritime Interests

|                    |                      |   |  |  |   |                                  |
|--------------------|----------------------|---|--|--|---|----------------------------------|
| Physical Products  | Monuments / Sights   | 12,13;(17);20,21;22,23;24;Z;25,26;29;43,44,45;47,48;58,59;65;S;   | 12,13;20,21;G;22,23;24;Z;25,26;43,44,45;47,48;58,59;60-65;S;                     | 60-65;   |   |                                  |
|                    | Museums / Exhibition | 12,13;G;(17);24;M;25,26;43,44;R;47,48;(50,51,52);60-65;69,70;71,72;V;S;   | 12,13;G;24;M;Z;25,26;43,44;R;47,48;60-65;69,70;71,72;V;                          | M;25,26;43-45;69,70;71,72;R;V;   |   |                                  |
|                    | Ships & Harbours     | 7,8;20,21;24;Y;25,26;43;60-65;V;S;  | 25,26  | 7,8;20,21;24;Y;25,26;43;V;S;   | 50-65;  |                                  |
|                    | Boat Trip            | G;24; Z; Y;25,26;(30-33);54,55;58,59;60-65;V  | G;24; Z;Y;25,26;(30-33);54,55;58,59;60-65;V (more interest than possibilities)   |  | 64,65;V   | ;(30-33);54,55;                  |
|                    | Deltaworks           | 10;12,13,;(M);25,26;(29);(38,39);(42);43,44;R;(50,51);(56,57);(71,72);(V)   | 12,13;25,26;43,44;   | 10;12,13,;(M);25,26;(29);(38,39);(42);43,44;R;(50,51);(56,57);(71,72);(V)  |   |                                  |
| Total              |                      | 3,4 ;5,6;(7,8);10;12,13;G;18,19;20;22,23;24;M;Z;Y;25,26;29;30-33;34,35;38,39;44,45;R;47,48;49-53;54,55;56,57;58,59;60-65;69,70;71,72;V;S; | 7,8;10;12,13;G;20,21;24;M;Z;Y;25,26;(29);42;43,44;R;(50,51);(56,57);(71,72);V;S; | 11;G;18,19;M;(Z);30-33;38,39;R;47,48;49;54,55,56,57;58,59;60-65;67,68;V;S; | 1,2;10,11;G;D;18,19;M;Z;E;25;30-33;38,39;43,45;R;54,55;56,57,58,59;60-65;V; |                                  |
| Maritime Interests | Total                | Explore   | Maritime   | Fun  | Parents / Grandparents  |                                  |
|                    |                      | Interests   |  |  |   | Restrains-connected family roles |

Table 26. Close-up scheme from a cluster that seemed to describe guests with maritime interests

Other Useful Benefits Schemes

|                        |  |  |  |   |                      |
|------------------------|--|--|--|---|----------------------|
| Physical Products      | General Infrastructure (restaurants, shops, accessibility, information, ...) | 3,4;5;6;7;8;10,11;12,13;G;D;16,17;18,19;20,21,22,23;24;M;Z;Y;25,26;27,28;30-33;34,35;37,38,39;42;43,44,45;R;49-52;54,55;56,57,58,59;67,68;71,72;V;S; | 3,4*,5,6,7,8,9;10,11;12,13;G;16,17;18,19,20,21;M,Z*;25,26;27,28;29;30-33;37,38,39;43,44,45;R*;49-53;54,55;56,57,58,59;60-65;67,68;71,72;V;S<br>*improvable | 1,2*;3,4*;5,6;7,8,9;10,11*;12,13*;14,15;16,17;18,19*;20,21*;24;M,Z;Y*;25,26;27,28;29;30-33;38,39;42,43,44,45;R;49-53;58,59;60-65;67,68;69;70*;71,72;V;S;<br>*improvable | M*,Z*<br>*improvable |
| Total                  |  | 3,4;5;6;7;8;9;10,11;12,13;G;16,17;19;20,21;M,Z;Y;25,26;27,28;29;30-33;34,35;37,38,39;43,44,45;R;50,51;54,55;56,57,58,59;60-65;67,68;71,72;V;S;       | 7,8;9;10,11;12,13;G;D;14,15;16,17;18,19;20,21;24;M,Z;Y;25,26;27,28;29;30-33;34,35;38,39;42,43,44,45;R;49-52;56,57,58,59;60-65;67,68,69,70;71,72;V;S;       | 1,2,3,4;5,6;<br>1,2;5,6;7,8,9;10,11;12,13;G;16,17;18,19;20;22,23;M,Z;Y;25,26;29;34,35;43,44;R;47,48,50,51,52,58,59;60-65;67,68,69,70;71,72;V;S;                         |                      |
| Infrastructure-Seekers | Total  | Shopping   | Culinary   | Dutch Culture   | Interests            |

Table 27. Close-up scheme from a cluster that seemed to describe infrastructure-seekers

|                   |  |   |   |   |                        |
|-------------------|--|---|---|---|------------------------|
| Physical Products | Oyster Beds                            | Y;34,35;V;  | Y;34,35;V;  |   |                        |
|                   | Biological Food                        | M,Z;56;57   |   | M,Z;56;57   | Z                      |
|                   | Other Regional / country-specific Food | 1,2;10,16,17;M;2;27,28;59,51,53;56,57;60-65;S;  | 1,2;10,16,17;M;2;27,28;29,59,53;54,57;60-65;G;  | 1,2;27,28;29;49-53;58,59;S;   |                        |
|                   | Fish (Food)                            | 1,2;7;8;G;D;16,17;M;2;29;28;29;40,41,45;50,51,57,58,59,60,65;67,68;69;70;V;S;   | 1,2;7;8;16,17;G;D;M;2*;25,26;29;43,44,45;59,61;57,58,59;60-65;17,68;69,70;V;S;<br>*highlylinked;Kibbaling   | 1,2;7;8;16,17;29;60-65  | 29                     |
|                   | Mussels (Food)                         | 5,6;G;16,17;M;Z;Y;25,26;27;43,38;39;R;51;57;69,70;V;  | 5,4;D;16,17;M;Z;Y;25,26;29;43,38;39;R;52;57;69,70;  | 16,17;25;29;34,35;  |                        |
| Total             |  | 7,8;9;10,11;12,13;G;D;14,15;16,17;18,19;20,21;M,Z;Y;25,26;27,28;29;30-33;34,35;38,39;42,43,44,45;R;49-52;56,57,58,59;60-65;67,68,69,70;71,72;V;S; | 10,25,6,7,8,9,10,11,12,13;G;14,17,18,19,20,22,23;M;Z;Y;25,26;27,28;29;30-33;34,35;38,39;42,43,44,45;R;47,48,50,51,52,58,59;60-65;67,68,69,70;71,72;V;S; | 3,4;10;G;16,17,20,21;24;M,Z;Y;25,26;27,28;29;30-33;34,35;38,39;42,43,44,45;R;49-52;56,57,58,59;60-65;67,68,69,70;71,72;V;S; |                        |
| Culinary Seekers  | Total                                  | Culinary  | Dutch culture   | Sustainability  | General Medical Health |
|                   |  | Interests   |   |   | Medical Health         |

Table 29. Close-up scheme from a cluster that seemed to describe guests seeking for culinary experiences

|                   |                        |  |   |  |            |
|-------------------|------------------------|--|---|--|------------|
| Physical Products | Especially Low Seasons | 3,4,5,6;10,11;16,19;34,35;71,72  | D   | 3,4;34,35  | 3,4,5,6;10 |
|                   | Accommodation          | 3,4;D;16,17;20;29;30-33;34,35;59,59;67,68;   | D;16,17   |  |            |
|                   | Dutch mentality        | 6,6;12,13;16,17;20;22,23;27,28;29;30-33;44,45;49-53;   | 16,17   |  |            |
|                   | Dog-Friendly Rules     | 10;G;D;16,17;20;M;Z;R;40;43*;59,51;56,57,58,59;60,61;<br>*complained about not cleaning-up dog+runner  | 10;G;D;16,17,20;M;Z;R;50,51,54,57,58,59;60,61;  | 20   | 29         |
|                   | Seaside (& Lakes)      | 1,2;3,4;5;6;7,8,9;10,11;12,13;G;D;14,15;16,17;18,19;20,21;22,23;24;M;Z;Y;25,26;27,28;29;30-33;34,35;37;38-39;40;41;42;R;49-52;54,55;56,57;58,59;60-65;67,68;69,70;71,72;V;S; | 10;G;16,17,20;M;Z;R;50,51,54,57,58,59;60,61;  |  |            |
| Total             |                        | 10;G;D;16,17,20;M;Z;Y;25,26;29;40;43*;59,51,54,57,58,59;60,61;<br>*complained about not cleaning-up dog+runner   | 1,2;3,4;12,13;16,17;20,21;24;M;Z;R;25,26;29;34,35;27,28;29;38,39;43,44,50,51,53;43,44;59,61,53; | 3,4;10;G;16,17,20,21;24;M;Z;25,26;27,28;29;38,39;43,44,50,51,53; |            |
| Dog-Owners        | Total                  | Deq-Owner  | Wellbeing   | General Medical  |            |
|                   |                        | Not trained+connected other roles  | Wellness Health   | Medical Health   |            |

Table 28. Close-up scheme from a cluster that seemed to describe guests travelling to Zeeland with dogs

## APPENDIX I – Results for Spreading Tourists in Time

### **Dog-owners**

Furthermore, as it was already known for VVV Zeeland, the province is appreciated among dog-owners for its **dog-friendly rules** (7/8 G.i. with dogs, 5 E.i.) which include, specifically in low season, the allowance to keep dogs at the leash at many **beaches**. „[...] *these endless beach walks that you can do, the dog can romp, [...] that's just... nicer than in high season*” (G50), G20 even including this into his very own interpretation of ‘doing **wellness**’. G16 and G17 also noted positively about the relaxed **Dutch mentality** towards dogs, that “*dogs are handled in a quite easy-going way [...], you can take them into restaurants without any major problems...*” (G17) and “*[...] into shops, that's different in Germany*” (G16). Also, dog-permitting **accommodations** were said to be easy to find (ZV.B/D,16). ZV.B/D from Zeeland Vakantie observed, that German guests with dogs come “*especially from September on*” and “*then want most preferably a closed garden so that the dog can easily go outside for a moment*” (ZV.B/D).

### **Culinary Favourites**

Interviewed German guests showed a favour for eating some regional food, whereby especially maritime dishes got mentioned and in particular the consumption of **fish** (12 G.i., 6 E.i.). Guests' statements included to eat “*[m]ostly fish*” (G1,G45) ,”*much fish*” (G59,G57), ‘*fish, of course*’ (G8,G29) and to “*[...] like eating out fish*” (G67) which was summed up by an employee with the following words:

IP.G/V: “*As always eating fish, eh, eating fish still stands at first place for the Germans. And that can just be in a very simple tent, in the market, that really mustn't be haute cuisine, the German just wants fish.*” (laughing)

A special favour was observable for enjoying **Kibbeling** (6 G.i., 2 E.i.), “*they also ask for that*” (IP.D/Z) at the tourist information and G67/68, having their mobile house in Breskens, told laughing that “*like to go to the market in Middelburg and eat Kibbeling there, 'cause there they are more delicious*” (G67). Also, **mussels** were frequently mentioned to be enjoyed “*of course*” (12 G.i., 4 E.i.) though did only one guest connect it to the location of Yerseke (G35). Other sporadically mentioned dishes were from **Zeeland's** but also the **Dutch kitchen** and ranged from crabs (G29) and lobster (G53) to pancakes (G10,G50), fries and frikandel (G50), Zeeuwse Bolus (G56/57;IP.D/Z;IP.H/S), stroopwaffels (G63), cheese (G61), and even something called “*Dutch lumpia*” (G59). Some guests used words and expressions like “*typical*” (G59,G61) and “*local food*” (G16,G27,G59), “*fresh*” (G8,G50), “*stay regional*” (G2) but also “*Dutch kitchen*” (G50, G59) when talking about their food choices, also making it sound like a matter of course to eat food that is offered in specific at a certain destination (6 G.i.):

G1: “*Fish mostly. But it's just logical to make use of the offer when being at the coast.*”

TI.C/M and IP.D/Z also observed other specialties about German guests, i.e. does TI/CM find, that Germans are already more about **biological food** than Dutch and restaurants with biological food are “*plus points*” (TI.C/M). IP.D/Z highlighted more that Germans find healthy food very important and “*pay more attention to it than other guests*” (IP.D/Z), thereby meaning “*untreated vegetables and such things [...] and not these masses [...]. But that's also just a few percentage, that's not that much*” (IP.D/Z). Besides fruit farmers G56/57 and dieting G29, there could not be found clear confirmation of the employees' observations, though may more insights into this not have been sufficiently requested in the interviews.

## APPENDIX J – Interview Transcripts (external document)

Due to the extensiveness of this appendix, the transcripts of 33 interviews with guests and 8 interviews with customer service employees in the tourism sector of Zeeland can be found in the separate document “Appendix J - Interview Transcripts\_Miriam Günter”. The document also contains e-mail conversations which content was considered in the research.

## Appendix K – Interview Codes (external document)

Due to the extensiveness of this appendix, all interview codes can be found in the separate document “Appendix K – Interview Codes\_Miriam Günter”.