

# Yachting and water sport development in the Netherlands in 2030, 2040 and 2050

English summary of Dutch report by WA Yachting Consultants, August 2016

## Introduction

As part of its national effort to conduct a market and capacity analysis for its waterways, the Netherlands governmental agency “Rijkswaterstaat” (National Water Board) has engaged WA Yachting Consultants to produce a projection for the growth of recreational water sports in 2030, 2040 and 2050, based on recognised national demographic scenarios and other statistical data.

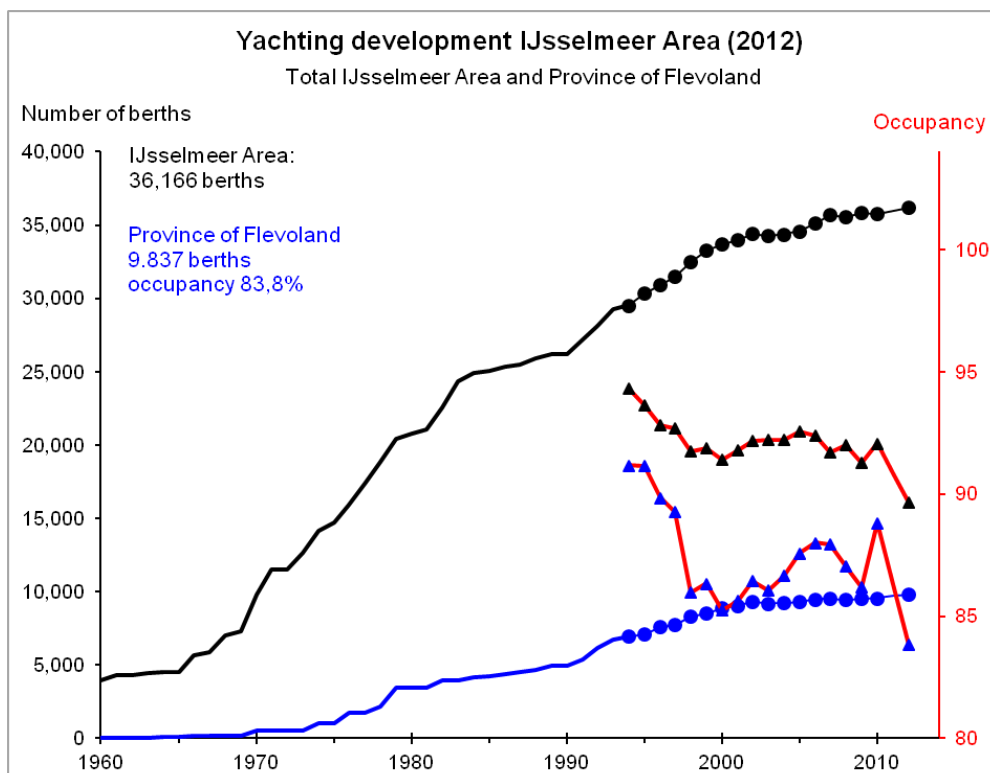
The report provides insights into developments and trends in water sports and generates scenarios for the future of the industry.

Data collection on recreational water sports, including the total number of boats, only began in 1994 when similar questions were first asked. Since WA Yachting Consultants was established in 1998 regular reports on the development of recreational boating in the Netherlands have been produced.

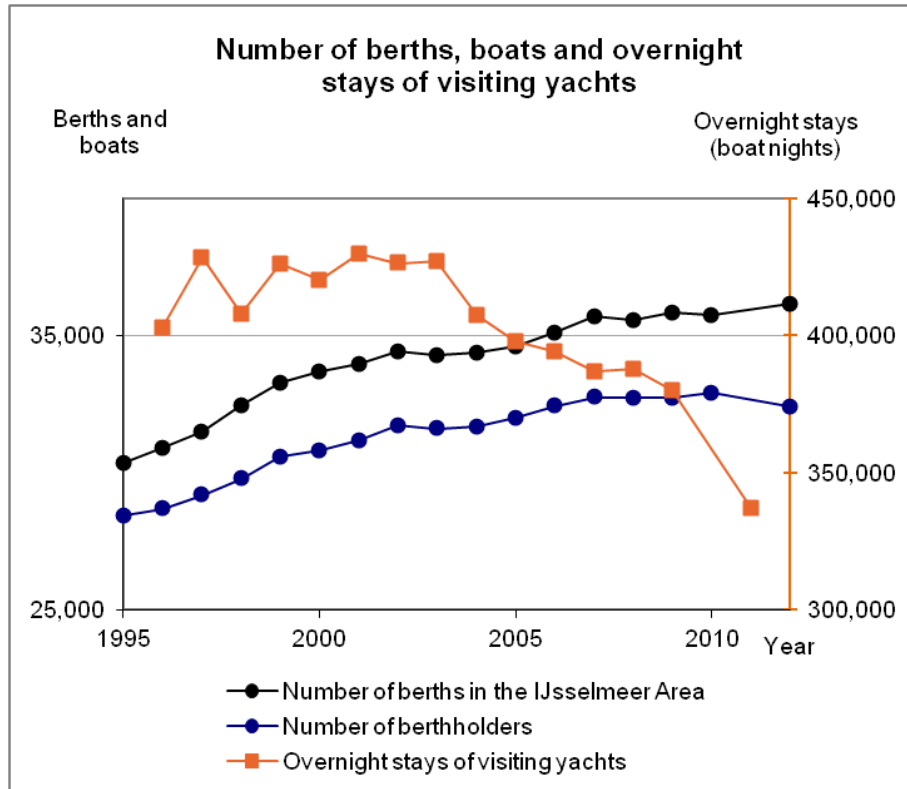
## 1. Decline in occupancy of marinas, berths and visitors

Over the years a solid set of data has been obtained in the area of the “IJsselmeer” -- an inner sea in the middle of the country – which serves as a credible sample for the study, representing 20% of all boats in the Netherlands. In 2012 there were around 36,000 berths available in the IJsselmeer, where more than 32,000 boats had their permanent moorings.

The sample reveals that up until 2010 the number of boats and the number of berths was increasing. Since 2010 however the number of boats has been in decline, while some marinas had still been increasing their capacity. Occupancy rates therefore went down as the graph below indicates.

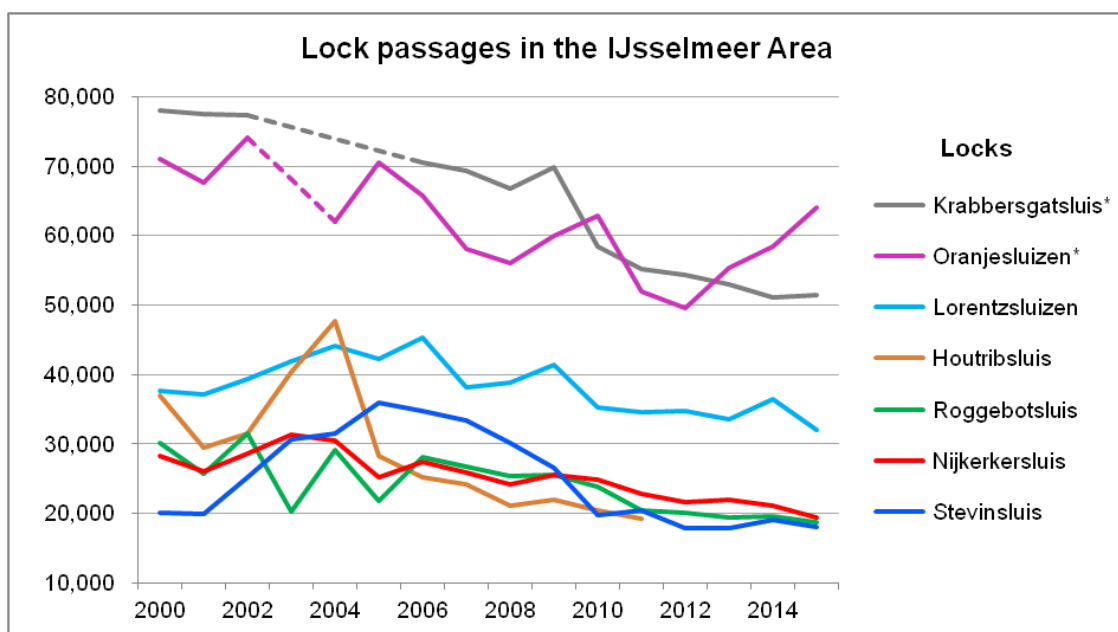


This change only became gradually apparent to the industry and was also confirmed in other watersport areas in the Netherlands. Additionally, the data revealed that the number of overnight stays by visiting boats in the IJsselmeer Area had been declining since 2003, as the next graph shows.



## 2. Reduction in passages via locks and bridges

The reduced number of visitors in marinas is also indicative of a reduction in sailing trips being made, as shown by the data collected at the locks around the IJsselmeer area and confirmed by a similar picture for other significant areas like the Zeeland estuaries and the Wadden Sea.



### 3. Changes in sailing behaviour, preference for other leisure activities

A first analysis reveals that recreational boating appears to be under pressure. Boats are favoured less and less over an increasing availability of different leisure activities and cheap airfares.

Although the number of lock passages in the Netherlands is on a decline it should be noted that sailing trips to destinations abroad is increasing, enabled by modern navigation support and larger boats.

Daytrips with smaller boats (day cruisers) is also a growing market. Many existing routes in the Netherlands are available to support this.

### 4. Aging population of boat ownership

Data available from surveys in 1993, 2002 and 2013 provide the following insights into the age of boat skippers.

	1993		2002		2002 (IJ&W)		2013	
	Number	%	Number	%	Number	%	Number	%
Under 30 years	112	10	70	5	37	4	18	2
30 - 40 year	202	18	185	13	94	11	41	5
40 - 50 year	416	37	349	24	174	21	140	18
50 - 60 year	393	35	843	58	343	40	237	30
Over 60 years					199	23	345	44
<b>Total</b>	<b>1,124</b>	<b>100</b>	<b>1,447</b>	<b>100</b>	<b>847</b>	<b>100</b>	<b>781</b>	<b>100</b>

The aging of skippers is a trend that needs to be considered when assessing the future development of water sports. Almost 75% of boats are owned by people over 50. The “Baby Boomers” (born after the Second World War between 1945 and 1970) own most of the Dutch recreational fleet.

Younger people do not want to commit to boat ownership, even if they could afford it. Their interest appears to be in foreign travel and a new variety of leisure activities that are now widely available and within reach. Those who want to sail either borrow a boat owned by family or friends or rent a boat. In due time this will result in an oversupply and lack of demand for recreational boats.

### 5. Lack of water sport culture in growing non-native population

While water sports are historically an important part of Dutch culture, many cultures around the world have little affinity for water sports. Many non-native residents (immigrants) in the Netherlands come from these cultures and the number of non-native residents in the Netherlands is expected to rise from 9% in 1996 to 31% in 2060

## 6. Demographic scenarios all point to little to no population growth beyond 2030

Demographic projections in the Netherlands predict limited growth of the population up to 2030 with two likely scenarios thereafter: a low-growth scenario projects a possible small shrinkage after 2030; and a high-growth scenario projects a small growth in population after 2030. In both scenarios the percentage of elderly people will increase (currently 1 in 6 is over 65, in 2050 it is expected to be 1 in 4).

Over the past 35 years the number of school children has continually decreased. In the low-growth scenario this slight decrease will continue to take place.

## 7. Water sports scenarios project decreased number of boats through 2050

There are about 500,000 boats in the Netherlands: 200,000 in the water in marinas, canals and at private or holiday homes; 200,000 stored on land and still used regularly; and 100,000 on land in barns, garages, etc. that are not used anymore (mainly surfboards, dinghies, canoes and so on).

No reliable data were available on the numbers of new boats sold, the second hand market, import and export of existing craft and disposal of End of Life Boats (ELBs).

For this project representatives of HISWA and the Dutch Yacht Brokers Association estimated the current market of yachts sales per year at:

- 1200 new boats (berthed in water at marinas, moorings and private or holiday homes)
- 2150 second hand boats sold that stay in the Netherlands
- 650 second hand boats that are exported and 50 imported
- 500 ELBs to be disposed of per year.

Assuming people stop sailing at the age of 80, the long term effects of aging boat ownership on the boat fleet of the Netherlands are illustrated in the table below. Boats will have to be sold to new owners in the Netherlands, abroad or dismantled and demolished.

Age boat owners	Born between	Age boat owners [%]		Number of boats in	Generations quit sailing			
		2002	2015		2015 -2025	2025 -2035	2035 - 2045	2045 -2055
Under 30 yr.	1985 - 1995	4%	2%	3,950				
30 - 40 year	1975 - 1985	11%	5%	9,875				
40 - 50 year	1965 - 1975	21%	18%	35,550				quits
50 - 60 year	1955 - 1965	40%	30%	59,250			quits	
60-70 year	1945 - 1955	16%	30%	59,250		quits		
70 - 80 year	1935 - 1945	8%	15%	29,625	quits			
Over 80 yr.		0%	0%	0				
		100%	100%	197.500				

The long term consequences estimated by HISWA and the Dutch Yacht Brokers Association are listed below:

	2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	2035 - 2045	2040 - 2045	2045 - 2050	2050 - 2055
Number of boats berthed in water	197,500	195,500	188,400	177,200	169,200	162,200	155,700	150,200	145,200
Sales, new yachts	1,200	6,000	6,000	6,500	6,500	7,000	7,000	7,500	7,500
Export, used yachts	600	-3,000	-3,500	-4,000	-4,500	-5,000	-5,500	-6,000	-6,500
Demolition ELB	500	-5,000	-9,600	-13,700	-10,000	-9,000	-8,000	-7,000	-6,000
<b>Total</b>		<b>-2,000</b>	<b>-7,100</b>	<b>-11,200</b>	<b>-8,000</b>	<b>-7,000</b>	<b>-6,500</b>	<b>-5,500</b>	<b>-5,000</b>
<b>Sales used yachts that stay</b>	2,150	10,000	11,000	12,000	13,000	14,000	15,000	16,000	17,000

The above assumptions led to the following scenarios for the water sport industry in the Netherlands:

#### Index based on the number of boats

2015	2015 - 2025	2025 - 2035	2035 - 2045	2045 - 2055
100	97	88	80	75

#### Scenarios

2015	2020		2030		2040		2050	
	High	Low	High	Low	High	Low	High	Low
100	107	87	96	79	89	72	82	67

## 8. Conclusions

In both the high-growth and low-growth scenarios the number of boats in the Netherlands will decrease by around 25%. The outcome will depend on the national economy and how we will recover from the economic and financial crisis, but also on actions taken by the sector such as a successful 'Go Boating Campaign' to attract new buyers and users.

The Netherlands' inland waterways network is unique. Regardless of local governments', provinces and municipalities' budget problems, maintenance and improvement of that network will need permanent and serious attention. International trade and promotion will have to be further developed. International safety, refugee issues and (marina) rates for holiday and sailing destinations in the Mediterranean will all influence the future of the Dutch yachting market. Markets in Asia, specifically in Thailand, the Philippines and China, will offer new opportunities.

More European countries will be confronted with comparable problems and challenges. According to WA Yachting Consultants the report will and should lead to discussions about the future of water sports and more cooperation between parties involved.