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Protect & Prosper

Transnational visitor survey in the Wadden Sea region 2020/2021

Danish Wadden Sea region

Kiel, Spring 2022

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- The **PROWAD LINK project**, which is co-financed by Interreg VB North Sea Region, aims to create benefits for small and medium businesses by linking sustainable growth with nature protection. The PROWAD LINK project group consists of 15 project partners from five different countries: Denmark, Germany, Netherlands, Norway and the UK. The Schleswig-Holstein Wadden Sea National Park Authority (LKN.SH/NPV) is, within this project, responsible for the management of the transnational visitor survey.
- The aim of this survey was to conduct a visitor survey simultaneously and with coordinated content in the three Wadden Sea countries of Denmark, the Netherlands and Germany (Lower Saxony and Schleswig-Holstein).”
- Among others this **guest survey will provide information** on guest perceptions, the importance of sustainable tourism and the World Heritage status of the Wadden Sea. A harmonised questionnaire has been produced in a total of seven versions due to the differences in language and regional specifics.
- The following methods were used to conduct the study:
 - Germany: self-completion paper-pencil survey in overnight accommodations with the option to also complete the questionnaire online; it describes the totality of overnight guests in the German Wadden Sea region by season, region and type of accommodation.
 - The Netherlands: online survey and paper-pencil survey of overnight and day visitors
 - Denmark: face-to-face interviews of overnight and day visitors in tourism-relevant places in the Wadden Sea region

These methodological differences must be taken into account when comparing results.



Area of investigation: Denmark



Map: © www.waddensea-worldheritage.org

Summary (1): Method

- **Visitor survey Danish Wadden Sea region 2020/2021:** The results of the visitor survey in the Danish Wadden Sea region 2020/2021 are based on a sample of n=579 (n = number of completed questionnaires). Furthermore, different target groups can be selected from the data and looked at in more detail, for example the importance of regional products for first-time visitors vs. regular visitors of the Danish Wadden Sea region.
- **Method and basis:** The visitor survey in the Danish Wadden Sea region was conducted via face-to-face interviews with day trippers and overnight guests aged 18 years and older using a standardised questionnaire. The interviews were conducted at different locations in places with tourist significance. Survey period of the reported data: August to October 2020 and April to June 2021.
- **Executing institutes:**
 - Conducting the survey:** Nationalpark Vadehavet – The Danish Wadden Sea National Park Authority
 - Evaluation of the survey:** Institute for Tourism Research in Northern Europe (NIT), Germany



Summary (2): The stay at the North Sea – Travel behaviour

- **Travel experience:** Almost half of the guests of the Danish Wadden Sea region are first-time visitors (47%, 11% are second time visitors and almost every third has repeatedly visited this region before (29%).
- **Reason for travel:** Trips to the North Sea are mainly holiday trips and short breaks (93%). For 7% of the respondents, the trip was made to visit relatives/friends. Business trips hardly play a role.
- **Accommodation:** A quarter of the surveyed guests of the Danish Wadden Sea region stayed on a camping site (25%) and almost every fifth guest in a bungalow park (17%). 19% booked a holiday unit, 9% chose a bed & breakfast/private room or an Airbnb and only 8% stayed in a hotel.
- **Length of stay:** A trip to the Danish Wadden Sea region lasts on average about 5 days, whereby almost one third of the guests visited the region on a day trip (28%), another third stayed between 5 to 8 days (33%) and every fourth spend 2 to 4 days there (23%).
- **Means of transport:** By far the most frequently used means of transportation is the car (86%). Only 5% of the visitors come by train or bike.
- **Date of travel:** About half of the reported trips to the Danish Wadden Sea region were made during spring 2021, 30% in autumn 2020 and 21% in summer 2020.



Summary (3): The stay at the North Sea - Information sources and excursions

- **Sources of information:** The three most important information sources for the guests of the Danish Wadden Sea region are internet search engines (46%), specific websites of the region or place (39%) and accommodation websites (39%). About a third of the visitors named family and friends as an additional information source. 14% did not seek any information before the trip and 14% used online bookings sites.
- **Excursions:**
 - **Volume:** Every second guest of the Danish Wadden Sea region made at least one excursion from their holiday destination during their stay. The average number of excursions made during the stay is 2.9.
 - **Means of transport:** On their excursions, the majority of the Danish Wadden Sea region guests used the car (81%), 23% the bicycle and only 3% bus or train.
 - **Destinations:** 85% of North Sea guests made at least one trip to the mainland, 50% to an island. On average the guests made 2.2 trips to the mainland and 1.5 trips to the islands.



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Summary (4): The stay at the North Sea – Travel behaviour and tourist offers

- **Travel expenses:** On average guests of the Danish Wadden Sea region reported travel expenses of EUR 80 per day and person (accommodation: EUR 47; other services: EUR 33, excluding arrival/departure). The average of total travel expenses amounts to EUR 805.
- **Travel company:** 90% of guests at the North Sea travel in company. The average group size is 3.0 persons. About one third of the visitors traveled with children (0-17 years) and 16% of Danish Wadden Sea region visitors are accompanied by dogs.
- **Tourist offers:** With four out of five visitors of the Danish Wadden Sea region using access to the internet and shopping (food etc.) offers, these are by far the most frequently used offers and they received rather high ratings (83% and 87% rated with “very good/good” ratings, respectively). Daytrip, beach and bathing as well as hiking/jogging/... opportunities were used by 60 to 70% of the visitors, who rated those offers extremely high (at least 94% rated with “very good/good”). Only around half of the guests used cultural and culinary offers, Wadden sea exhibition center and shopping offers and only one third visited a tourist information office. Other tourist offers such as guided tours, organised outdoor activities, swimming pool or public events were barely used, but rated well. Public transport with bus and train received the lowest share of good ratings (18% with “very good”), transportation with the ferry, however, was rated much higher (63% with “very good”), although both were only used by 15% of the visitors.



Summary (5): The stay at the North Sea - Environmental aspects and awareness of status

- **Information on the Wadden Sea:** There are three main sources of information on the Wadden Sea which are similarly important for visitors: Information boards and displays (42%), leaflets/brochures (40%) and the internet (37%). Only 15% of the visitors used the Wadden Sea exhibition or visitor centres as information source. Around 10% get information from the tourist information or their landlord. Most other information sources are negligible.
- **Reasons for travelling:** By far the most frequently mentioned travel decision reasons for the North Sea are the recreational opportunities (77%) and the landscape/location (77%). Climate and air quality (65%) and the nature (62%) are also important reasons for choosing the Wadden Sea as a travel destination.
- **Importance of environmental aspects at the destination:** The protection of nature at the holiday destination and experiencing intact nature during the holiday is (very) important for almost all respondents (91% and 90% respectively). For most visitors of the Danish Wadden Sea region the following aspects are also very important or important: specifically learning about the nature at the holiday destination (84%) and learning about the region or place itself (84%) as well as staying away from the hustle and bustle of tourist crowds (82%).
- **Attitude towards nature and environmental protection aspects while on holiday:** 35% of Danish Wadden Sea region guests are willing to spend more money for a hotel or accommodation if it has an eco-label, 46% prefer businesses that show they are contributing to environmental and nature protection, 35% are willing to donate a small amount of money to financially support nature protection at the destination and 26% state the importance of a selection of specialised offers regarding the Wadden Sea theme.
- **Awareness of the Wadden Sea World Heritage status:** With 92%, the majority of guests are aware of the World Heritage status of the Wadden Sea.



Summary (6): The stay at the North Sea – Relevance of status and nature experience

- **Relevance of status as National Park and World Heritage Site:**
 - For 54% of guests, the protection of the Wadden Sea as a national park was a (very) important reason when planning the journey.
 - In contrast, the designation of the Wadden Sea as a World Heritage Site is less often very important or important for the travel decision (45%).
- **Interest in nature experience offers:** 43% of the respondents are interested in nature experience trails and 40% in visiting Wadden Sea exhibitions or visitor centres. Every third guest would like to do a trip to the seal colonies (30%) and every fourth is interested in presentations on nature and the environment (25%) as well as guided saltmarsh, dune or beach tours (24%). Guided trips to the islands (21%), birdwatching tours (20%), and tidal flat hiking tours (19%) are an option for about one in five guests.
- **Restrictions due to nature conservation regulations:** No respondent felt restricted by nature conservation regulations in the Wadden Sea due to the protective status as a World Heritage/National Park during their holiday.
- **Willingness to recommend the region as a holiday region:** The willingness of visitors to recommend the place they currently stay at the North Sea is high: the average rating for the Danish Wadden Sea region is 8.7 on a 10-point-scale with 10 = highly likely and 0 = not likely at all. 83% of the respondents can imagine to recommend the region as a holiday destination (with ratings of 8 or higher). There were no ratings lower than 5.



Summary (7): Visitor structure

- **Age:** Half of the visitors at the Danish Wadden Sea region are 50 years and over (average: 48.3 years), whereby one fourth of all guests are between 50 and 59 years old.
- **Gender:** 52% of the Wadden Sea guests in Denmark are female, 42% are male.
- **Children/young people (0-17 years) in the household:** More than one fourth of the domestic North Sea guests live with children/young people in the household. The average household size is 2.4 persons.
- **Net household income:** Almost half of the North Sea visitors overall have a net household income of EUR 3.000 or more. Every fourth reported a net household income between EUR 2.000 and EUR 2.999.
- **Source markets:** 64% of respondents from the Danish Wadden Sea region are domestic travelers. The main source market for North Sea visitors in Denmark is Germany (26%).



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Method description (1)

- **Survey method:** Personal interviews on site
- **Target group:** Day trippers and overnight guests to the Danish Wadden Sea National Park region aged 18 years and older. When selecting respondents, care was taken to interview couples without children, families with children, those travelling alone as well as group participants.
- **Language:** Danish, German, English
- **Sample points:**
 - Ho/Skallingen: Vogterhuset, parking lot for Langli, Ho Harbour, supermarket
 - Varde City/Varde Tal harbour square in Varde, Janderup loading area
 - Fanø: Sdr Ho, Nordby, the ferry, Fanø Bath, tourist office, SuperBrugsen supermarket
 - Esbjerg: The Men at the Sea (art statues), Hjerting Bathhotel
 - Ribe: Pedestrian street, Kolvig, Kammerslusen, tourist office, Føtex parking lot
 - Mandø: Camping site, B&B, shop, Klithuset, parking lot Vr Vedsted (arriving from Mandø)
 - Rømø: Lakolk, Havneby shoppingcenter, Sønder Strand, Tønnisgaard, tourist office
 - Tøndermarsken: Højer Mølle, Vidåslusen, Lægan, Rudbøl

→ In the distribution among the locations, care was taken to carry out interviews at each location. The actual number of interviews conducted varied depending on the location.



Method description (2)

- **Survey period of the reported data:**

- Summer 2020: 1 August – 31 August 2020

- Autumn 2020: 1 September – 31. October 2020

- Spring 2021: 1 April – 30 June 2021

Due to the Corona pandemic and associated restrictions the originally planned spring survey period planned for 2020 was postponed to spring 2021.

In addition, the survey was continued in summer 2021 (1 July to 31 August 2021). The data from this additional survey period will be compared with the data from summer 2020 in a separate evaluation and is not included in the data used for this analysis.

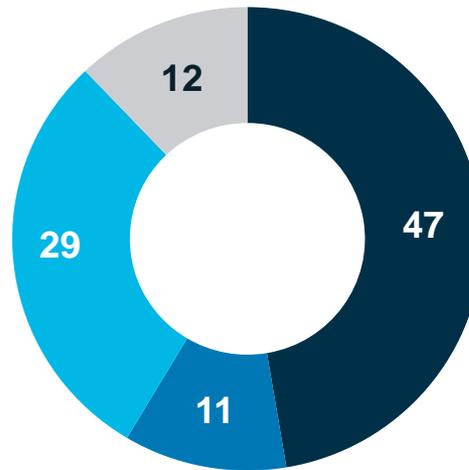
- **Seasonal distribution:** In the temporal distribution over the months, care was taken to conduct interviews in each month.
- **Number of respondents:** 579 respondents in total



Travel experience with the Wadden Sea region

in %

Danish Wadden Sea region



- First-time visitors
- Second time visitors
- Regular visitors
- No answer/don't know

Regular visitor: 3 times and more often at this location on an overnight trip

Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021

Question: How many times have you stayed previously at this location on an overnight trip?



Travel purpose

in %

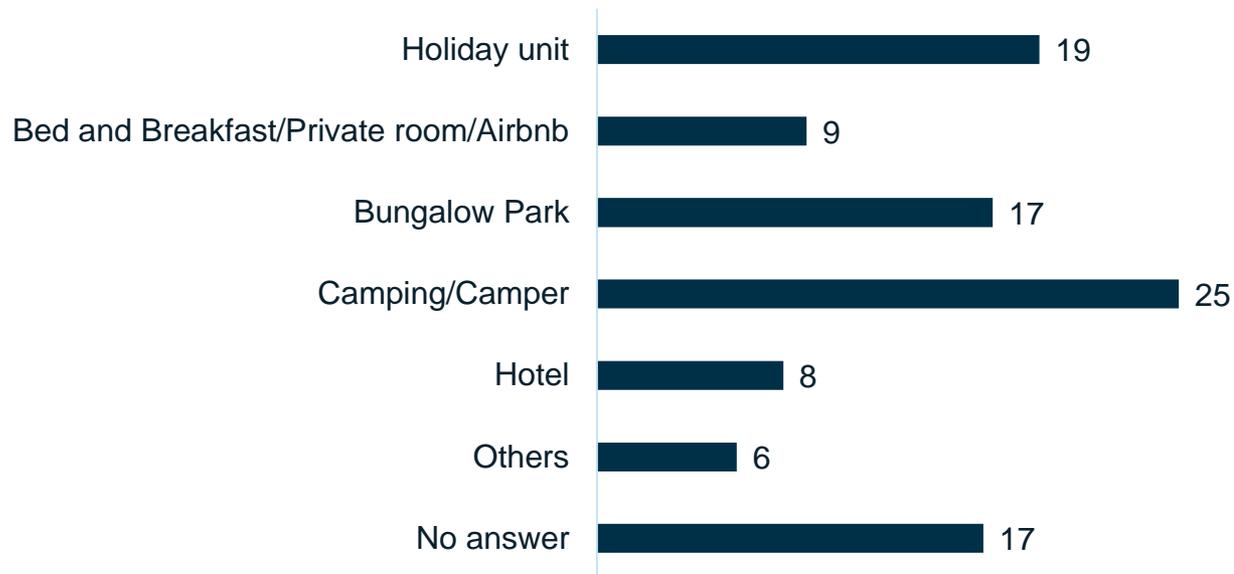


Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021
Question: What is the reason of your travel? (multiple answers)

Accommodation

in %

Danish Wadden Sea region



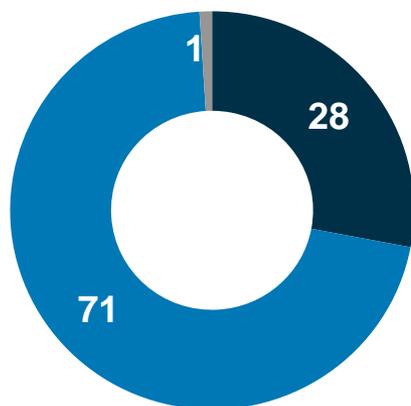
Basis: Respondents Danish Wadden Sea region (n= 579) in summer 2020, autumn 2020 and spring 2021
Question: What type of accommodation do you currently occupy?



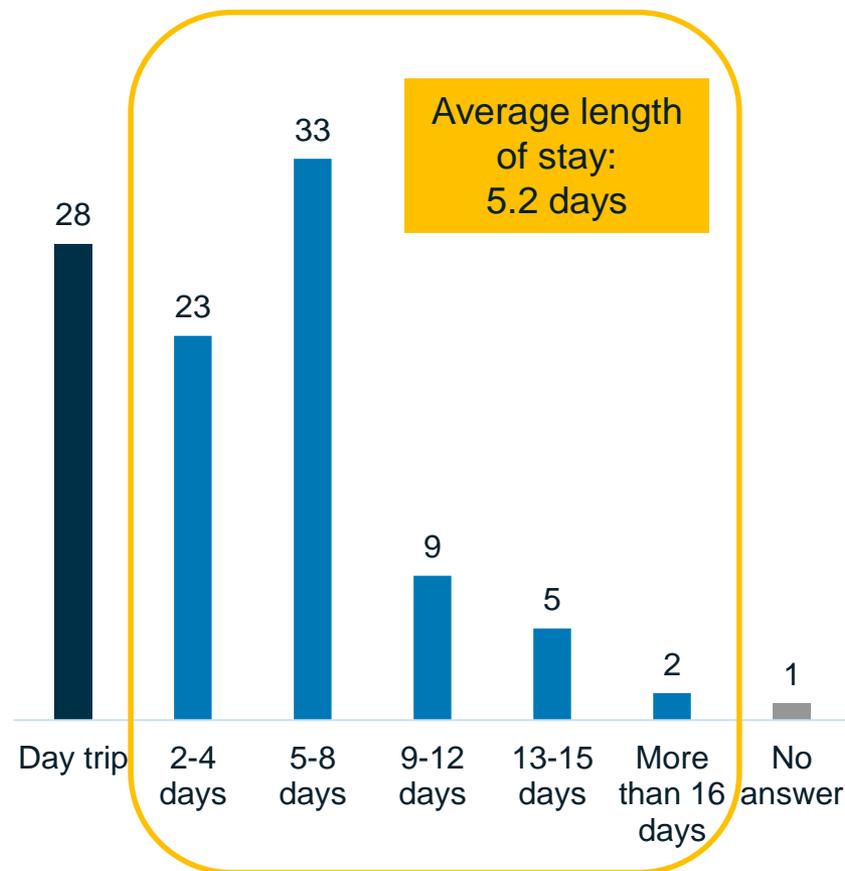
Length of stay

in %

Danish Wadden Sea region



■ Day trip ■ Overnight stay ■ No answer



Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021
 Question: How long are you intending to stay at your current location during your current travel?

Main means of transport of arrival

in %



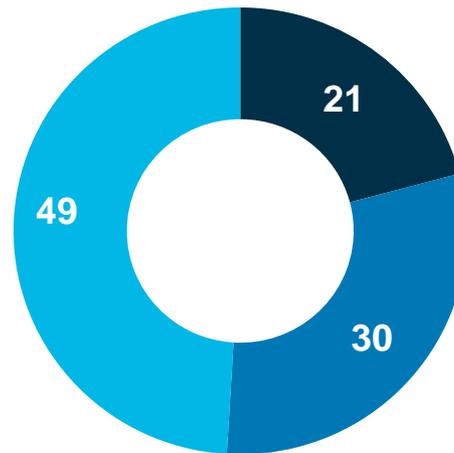
■ Car – fuel/diesel/hybrid ■ Car – electric/hydrogen ■ Train ■ Bus ■ Plane ■ Boat/ferry ■ Bicycle ■ Other ■ No answer

Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021
Question: What main mode of transport did you use to arrive at your current travel destination? (longest distance, single answer)

Date of travel

in %

Danish Wadden Sea region



- Summer 2020 (July - August 2020)
- Autumn 2020 (September - October 2020)
- Spring 2021 (April - June 2021)

Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021

Sources of information (TOP 10)

in %

Sources of information (TOP 10)	Danish Wadden Sea region
Internet search engines	46
Specific websites of the region/place	39
Accommodation website	39
Family, friends	30
I have not informed myself beforehand	14
Online booking sites, e.g. for holiday units or hotel rooms	14
Journalistic reports on the internet	7
Travel literature, travel guides	5
TV	5
Online rating portal	4

Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021
 Question: Where did you find information about your current travel destination? (multiple answers)



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Sources of information (TOP 11-20)

in %

Sources of information (TOP 11-20)	Danish Wadden Sea region
Tourist information in the region/place	3
Travel magazine	3
Brochure of the rental accommodation	2
Social media	2
Travel agency, tour operator	2
Newspaper, news magazine	2
Host directory	1
Someone else assembled the information	1
Travel exhibition	0
Others	4

Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021
 Question: Where did you find information about your current travel destination? (multiple answers)



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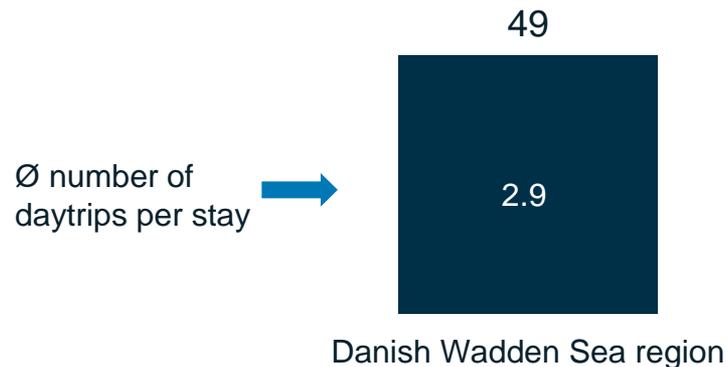


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Daytrips while staying overnight

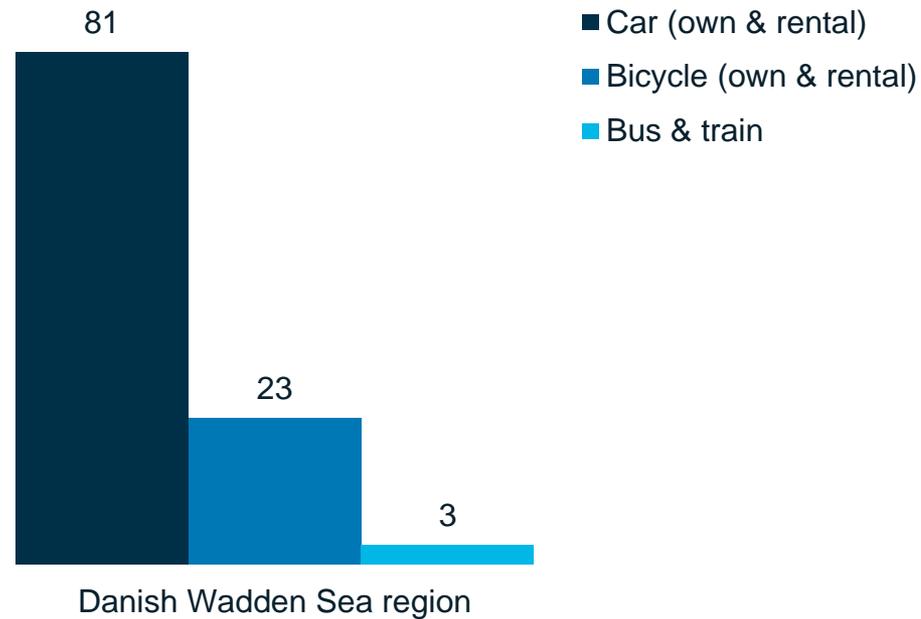
Daytrip intensity
(percentage of respondents who
have made at least one daytrip)



Basis: Respondents Danish Wadden Sea region, in summer 2020, autumn 2020 and spring 2021
Question: Did you do any day trips from your current location? (n=579),
Question: If yes, how many such daytrips did you do? (n=286)

Trips during overnight stays: Means of transport

in %



Basis: Respondents who did at least one trip during their stay, Danish Wadden Sea region (n=286) in summer 2020, autumn 2020 and spring 2021
Question: If yes, how many such day trips did you do by... own car? ...rented/shared car? ...own bicycle? ...rented/shared bicycle? ...bus or train?

Trips during overnight stays: Means of transport (details)

in %

Means of transport	Danish Wadden Sea region
Own car	81
Rented/shared car	0
Own bicycle	22
Rented/shared bicycle	1
Bus or train	3

Basis: Respondents who did at least one trip during their stay, Danish Wadden Sea region (n=286) in summer 2020, autumn 2020 and spring 2021
Question: If yes, how many such day trips did you do by... own car? Rented/shared car? own bicycle? Rented/shared bicycle? bus or train?



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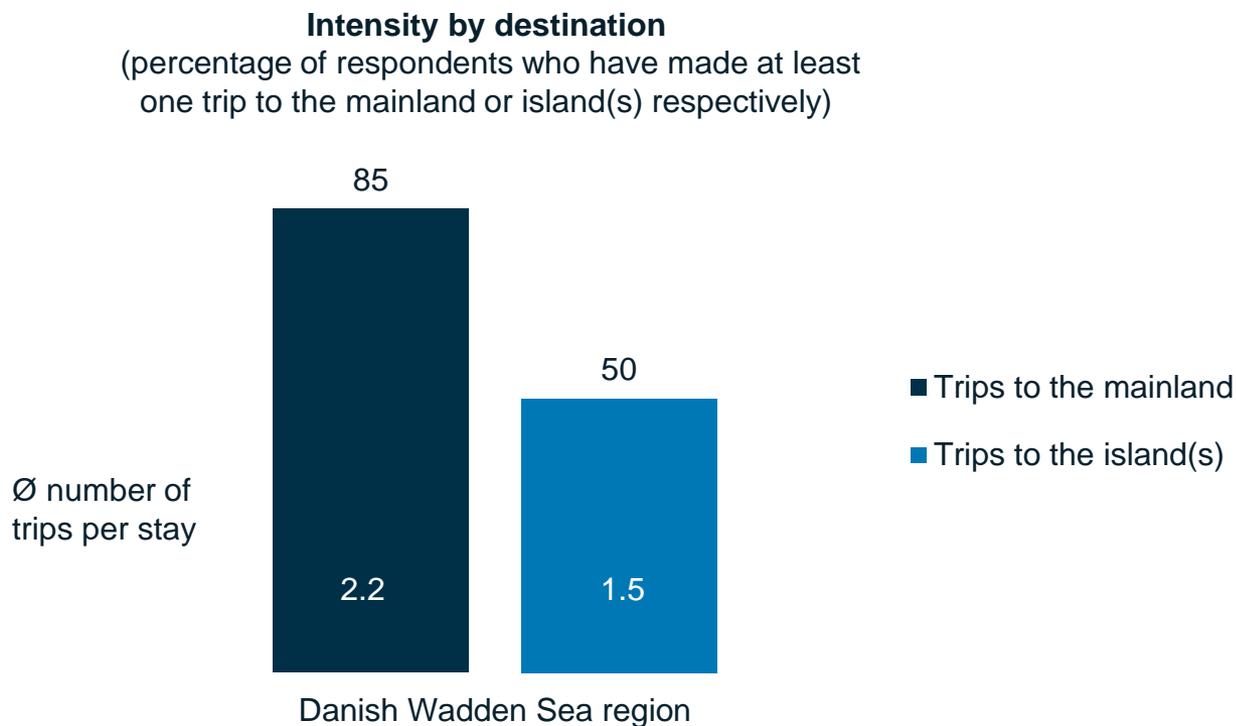
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Trips during overnight stays: destinations



Basis: Respondents who did excursions Danish Wadden Sea region (n=286) in summer 2020, autumn 2020 and spring 2021
Question: What was the destination of these day trips? (Please provide the respective number of your trips or write zero.)



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Travel expenses per person per day

in €

Travel expenses in EUR	Travel expenses per person and day (Ø)			Total travel expenses for all days and all persons per trip (without costs for arrival & departure)
	Accommodation	Other expenses	total	
Danish Wadden Sea region	47,-	33,-	80,-	805,-

Basis: Respondents Danish Wadden Sea region who did answer the number of persons they travel with, the number of days they stay and their expenditure (n=242)
 Question: How much did you spend during your stay at your current location (including everyone you travelled with for the time you stayed at your current location, excluding travel to and from your current destination)? (An estimate is sufficient.)

Travel in company

in %

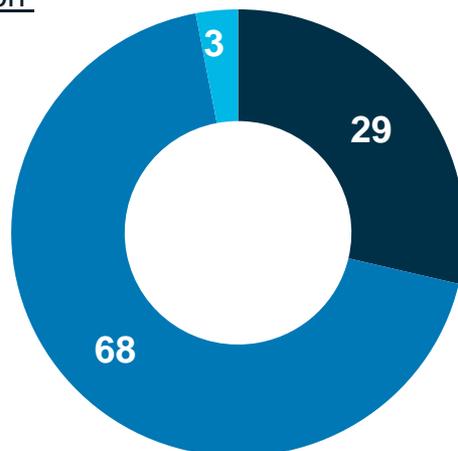


Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021
Question: How many people are included in the above estimate? How many people belong to your party, including you?

Travel in company: travelling with children

in %

Danish Wadden Sea region



- Travelling with children (0-17 years)
- Travelling without children (0-17 years)
- No (detailed) answer

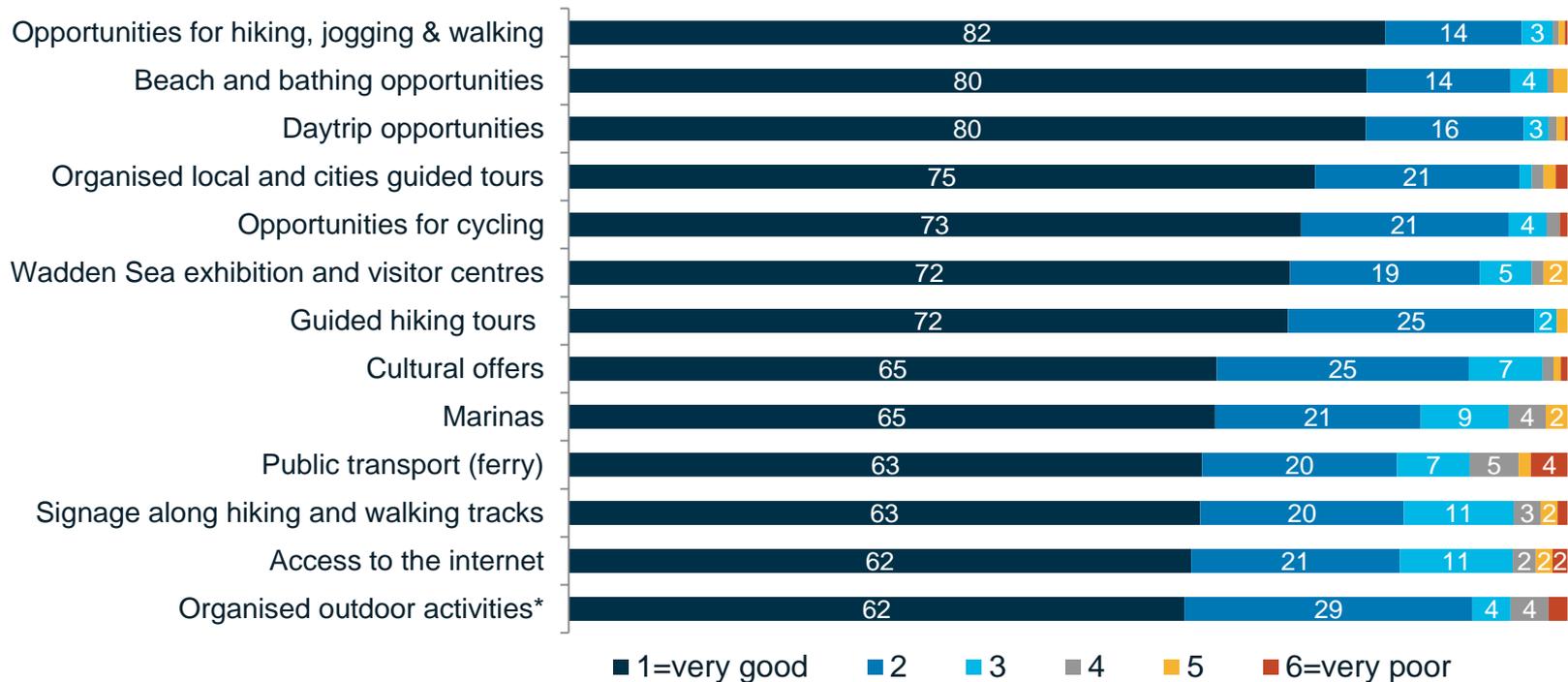
Travelling
with dogs:
16%

Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021

Question: How many people are included in the above estimate? How many people belong to your party, including you? Do you also travel with a dog(s)?

Ratings (I): tourist offers

in %

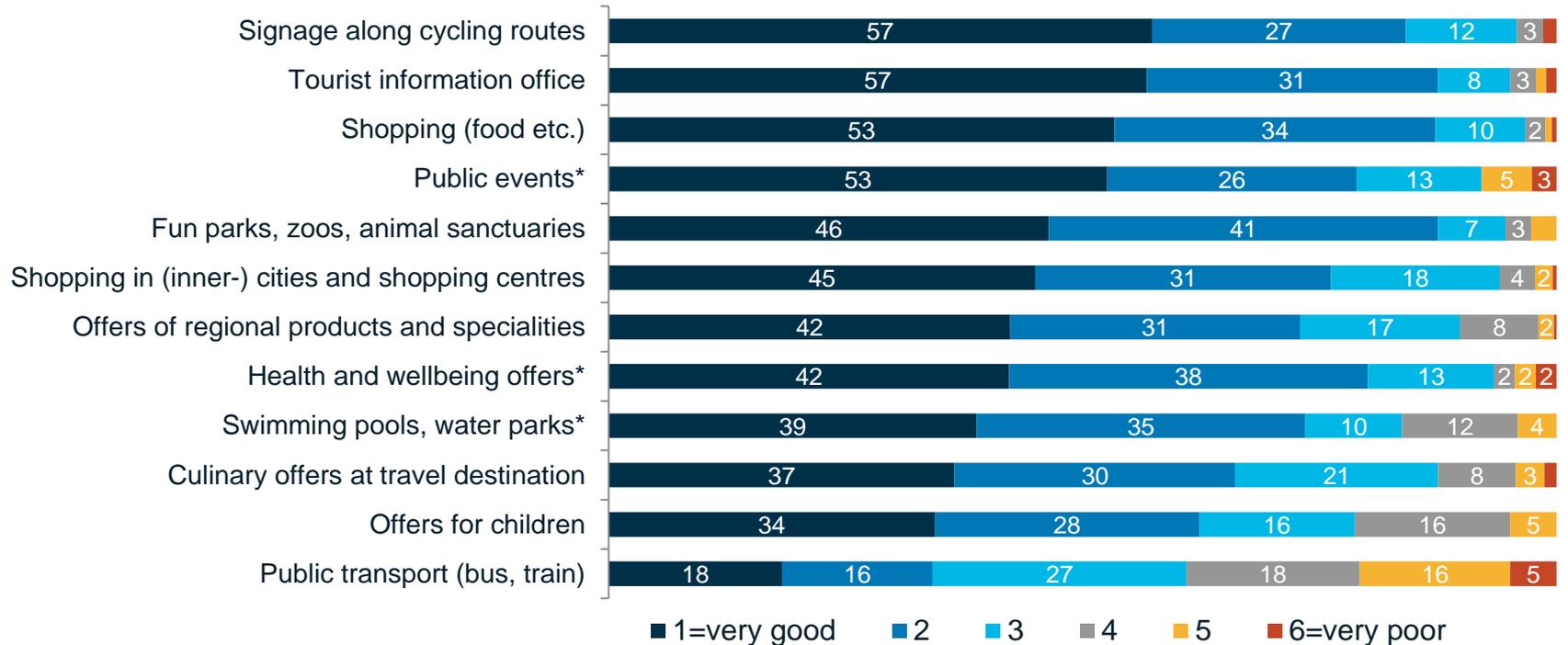


Basis: Respondents with indication to respective offer, Danish Wadden Sea region in summer 2020, autumn 2020 and spring 2021; * low number of respondents
 Question: How would you rate the following aspects at your travel destination? Please rate only those that you used yourself using the scale from 1 (very good) to 6 (very poor).



Ratings (II): tourist offers

in %



Basis: Respondents with indication to respective offer, Danish Wadden Sea region in summer 2020, autumn 2020 and spring 2021; * low number of respondents
 Question: How would you rate the following aspects at your travel destination? Please rate only those that you used yourself using the scale from 1 (very good) to 6 (very poor).

Tourist offers (I): Ratings and usage intensity (ranked by usage intensity)

in %



Basis: Respondents with indication to respective offer, Danish Wadden Sea region in summer 2020, autumn 2020 and spring 2021

Question: How would you rate the following aspects at your travel destination? Please rate only those that you used yourself using the scale from 1 (very good) to 6 (very poor). Here accumulated ratings of 1=very good and 2=good.



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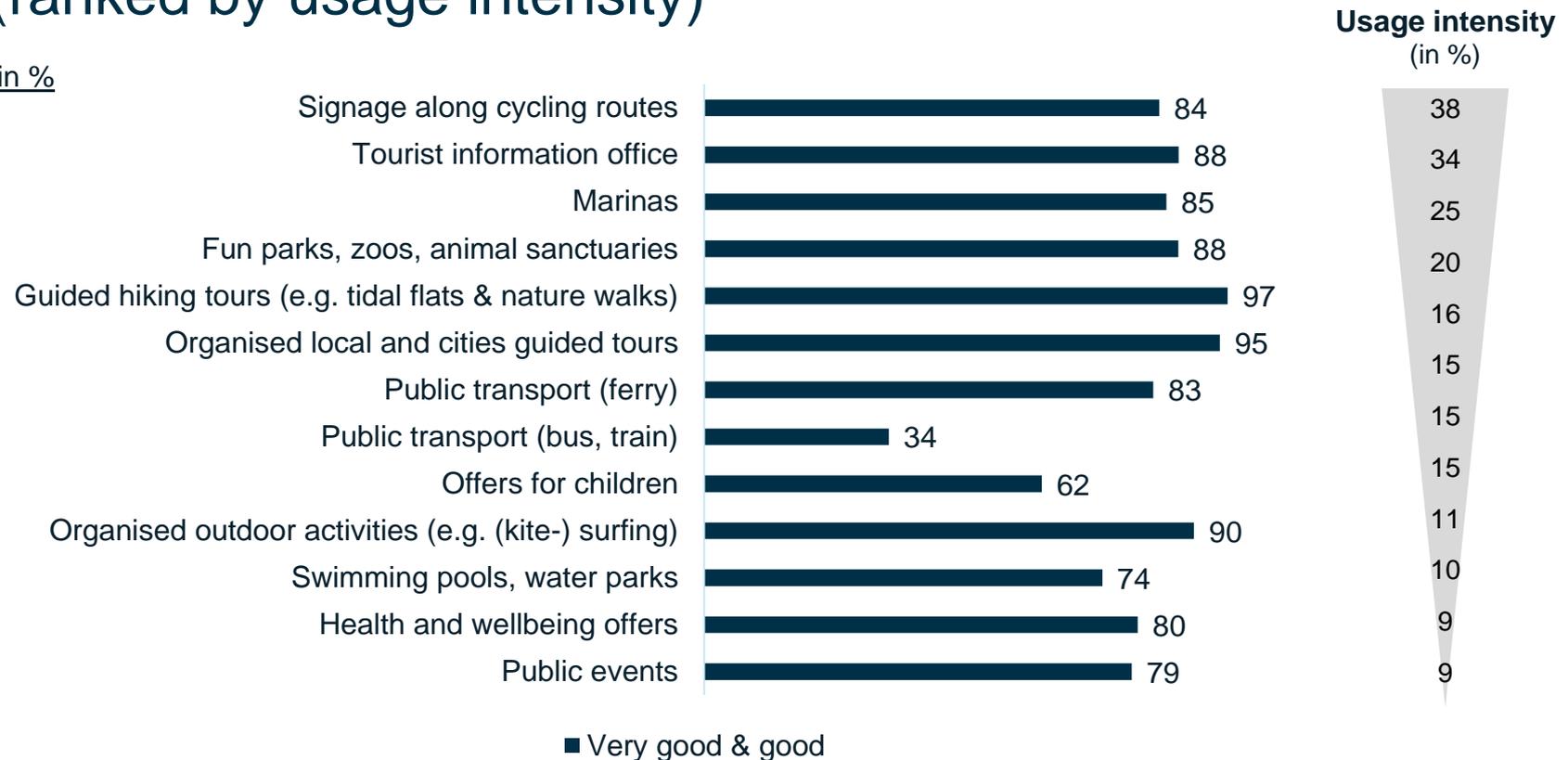


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Tourist offers (II): Ratings and usage intensity (ranked by usage intensity)

in %



Basis: Respondents with indication to respective offer, Danish Wadden Sea region in summer 2020, autumn 2020 and spring 2021

Question: How would you rate the following aspects at your travel destination? Please rate only those that you used yourself using the scale from 1 (very good) to 6 (very poor). Here accumulated ratings of 1=very good and 2=good.



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Sources of information about the Wadden Sea on site

in %

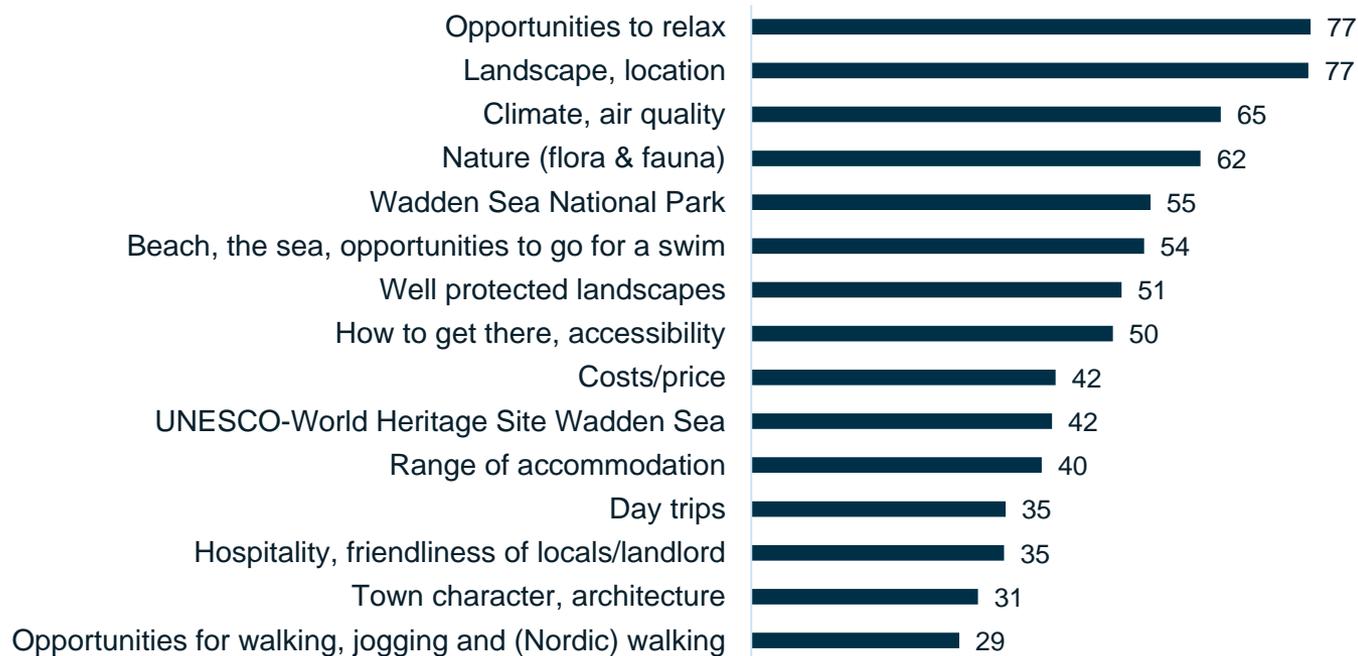


Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021
Question: Where did you get the most information about the Wadden Sea on site? (Multiple answers)



Reasons for the decision to travel to the Danish Wadden Sea region (TOP 15)

in %



Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021

Question: Which of the following aspects/features were very important to you and played an essential role in your decision to travel to this destination? (multiple answers)

Reasons for the decision to travel the Danish Wadden Sea region (TOP 16-29)

in %

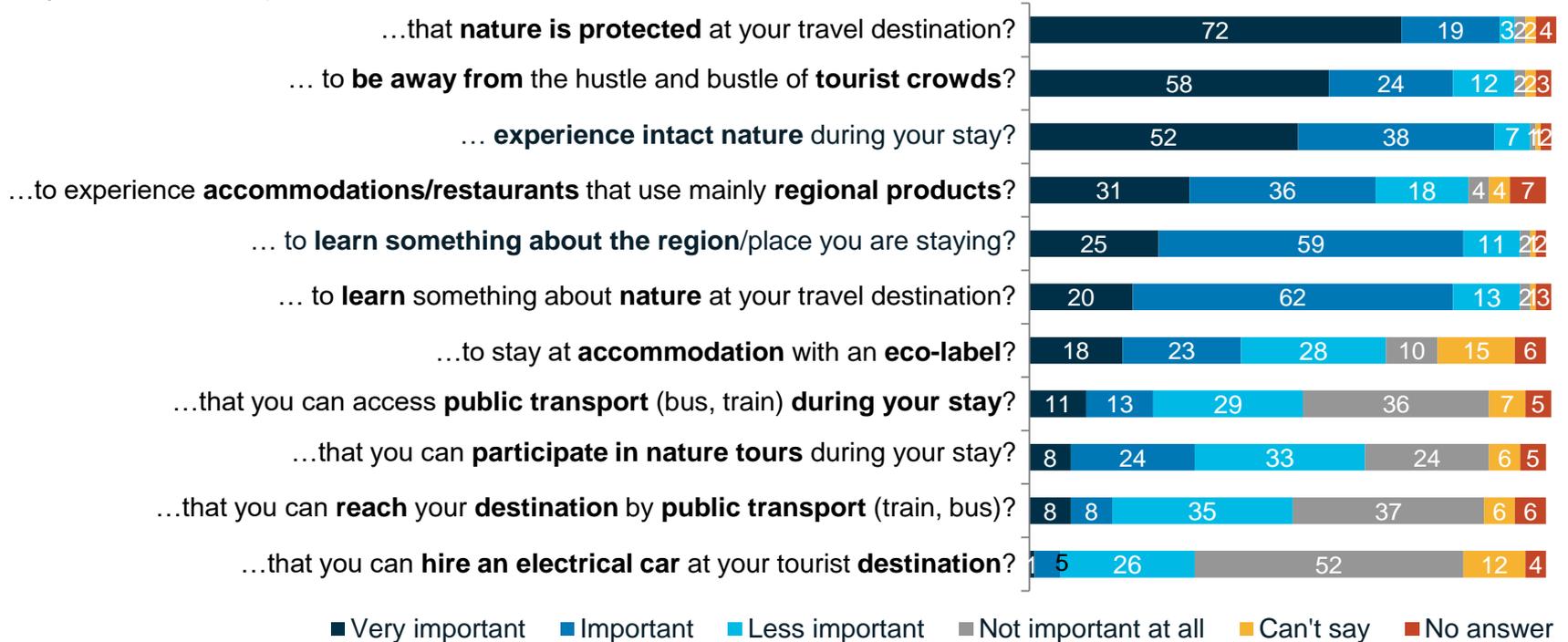


Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021
Question: Which of the following aspects/features were very important to you and played an essential role in your decision to travel to this destination? (multiple answers)

Importance of environmental aspects at the destination

How important is it for you ...

(figures for important/very important in %)



Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021,
 Question: When on holiday there are things that are very important to us, and others which are less important. Please indicate the importance of each aspect listed below during your holiday. Four-level scale (very important, important, less important, not important).

Willingness to pay for nature conservation measures

in %

I am willing to **spend more money** for a hotel or an **accommodation** business if it has an **eco-label**.

35

When on holiday I **prefer businesses** that show they are **contributing to environmental and nature protection**.

46

I am willing to donate a small amount of **money to financially support nature protection** at my travel destination.

35

A selection of **specialised offers regarding the Wadden Sea theme** is important to me.

26

Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021
Question: With which of the following statements do you agree? (Multiple answers.)

Awareness of World Heritage designation

Did you know that the Wadden Sea is a World Heritage site?

in %

Danish Wadden Sea region



Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021
Question: Did you know that the Wadden Sea is a World Heritage site?

Importance of the UNESCO World Heritage status and the National Park status for the travel decision

in %

When planning this journey, the protection of the Wadden Sea as National Park was...



When planning this journey, the UNESCO World Heritage status of the Wadden Sea was...



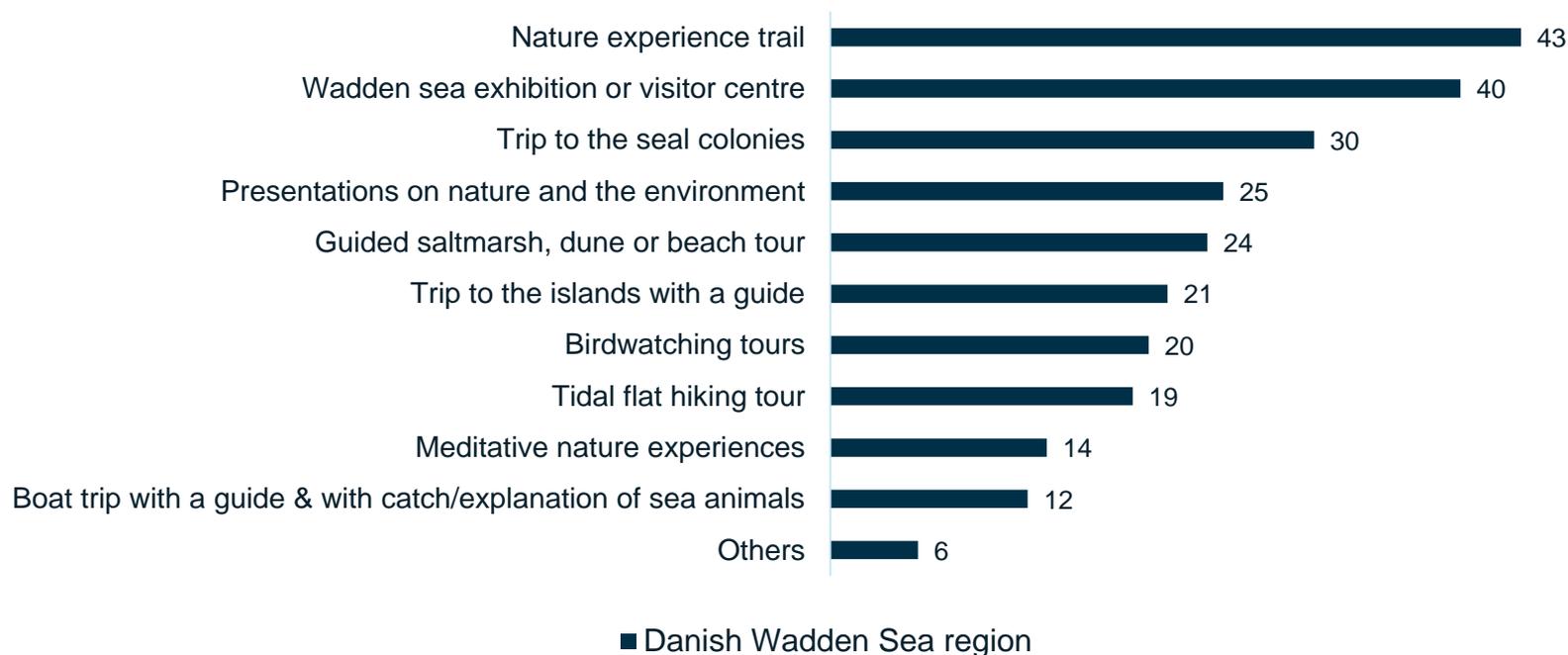
■ Very important ■ Important ■ Less important ■ Not important ■ Can't say ■ Didn't know about these aspects

Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021, percentage missing to 100% = no answer.
Question: How important were the following aspects when planning this journey? Four-level scale (very important, important, less important, not important).



Interest in nature tourism offers

in %



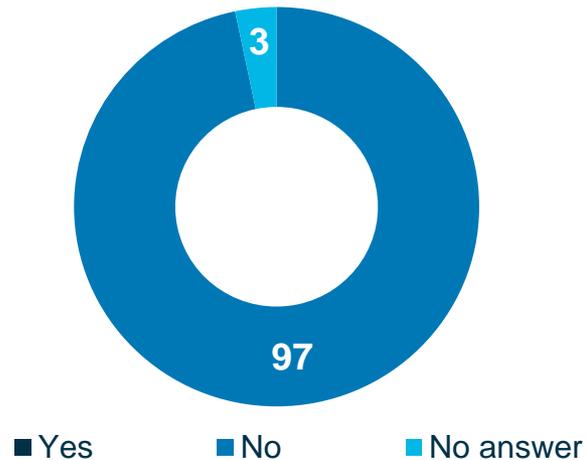
Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021
Question: Which of the following nature experience offers are of interest to you during your current stay? (Multiple answers)

Restrictions due to nature conservation: guest's point of view

Do you feel restricted in your ventures
due to the protective status of the Wadden Sea
as a World Heritage/National Park during your stay?

in %

Danish Wadden Sea region

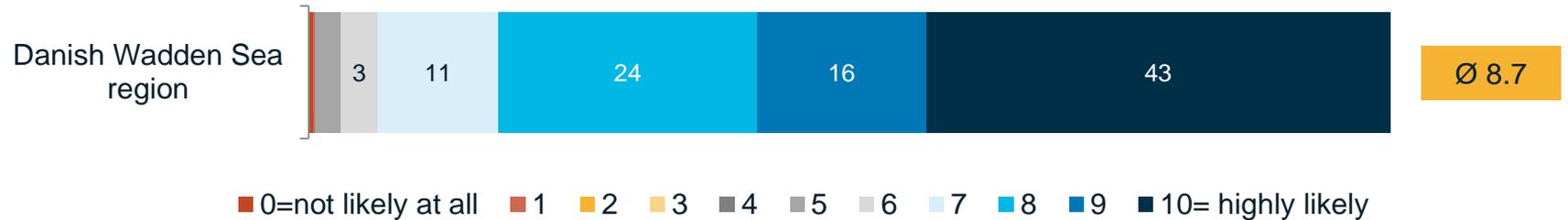


Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021

Question: Do you feel restricted in your ventures due to the protective status of the Wadden Sea as a World Heritage/National Park during your stay?

Willingness to recommend the region as a holiday destination

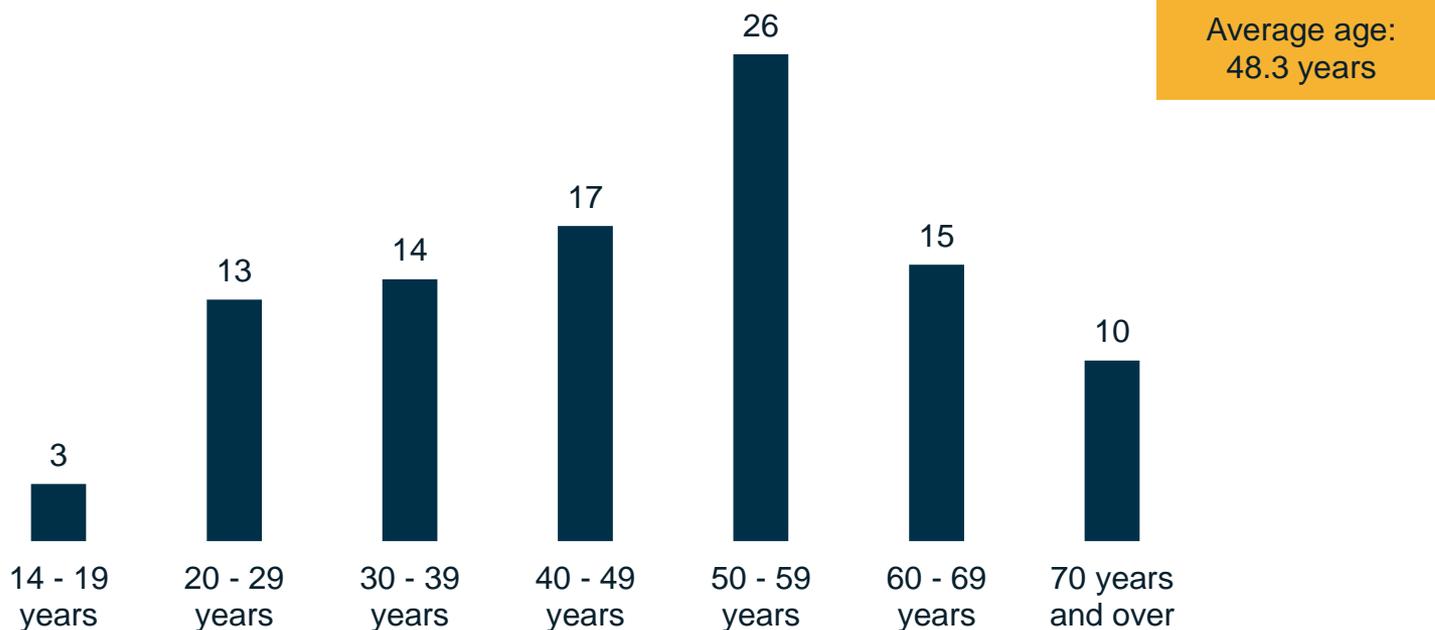
in %



Basis: Respondents with indication, Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021, percentage missing to 100% = no answer
Question: How likely is it that you recommend this destination to your family, friends and colleagues?

Age of the respondent(s)

in %



Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021, percentage missing to 100% = no answer



United Nations
Educational, Scientific and
Cultural Organisation



The Wadden Sea
World Heritage Site
since 2009



Nationalpark
Wattenmeer



Interreg
North Sea Region
PROWAD LINK
European Regional Development Fund



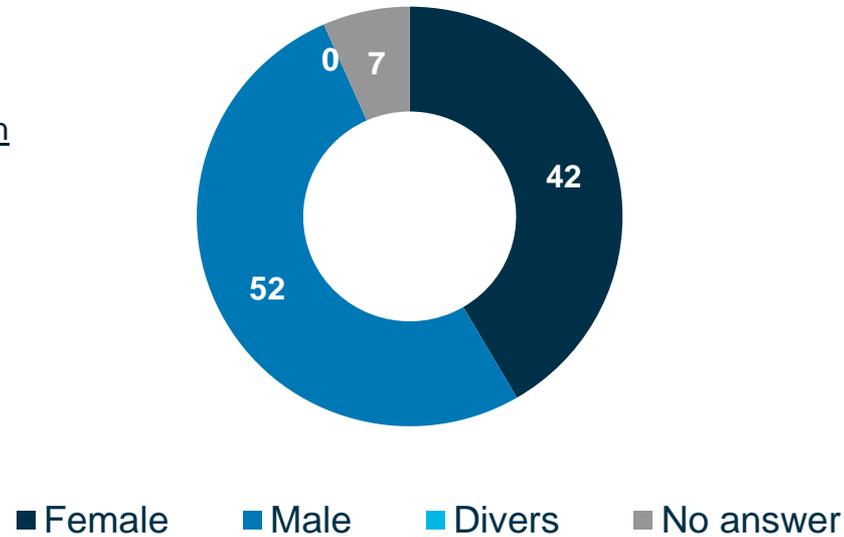
EUROPEAN UNION

PROWAD LINK

Gender of respondent(s)

in %

Danish Wadden Sea region



Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021

Household structure of respondent(s)

in %

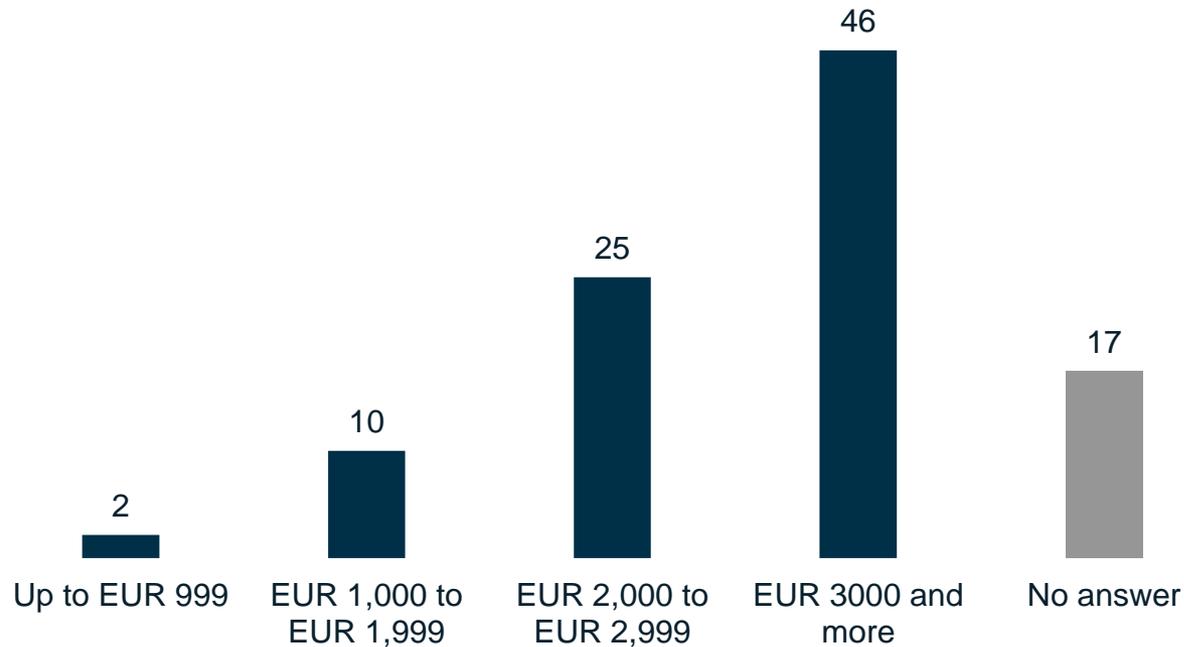


- With children (0-17 years) in household
- No children (0-17 years) in household
- No answer

Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021

Net household income of respondent(s)

in %

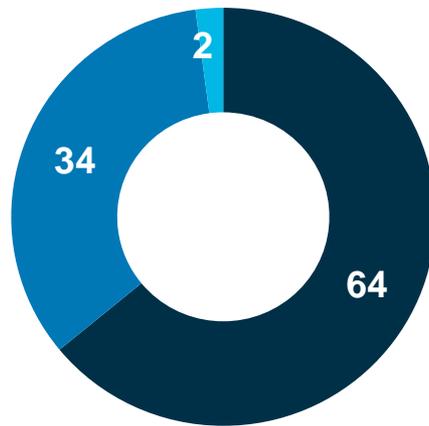


Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021



Residence of respondent(s)

in %



- Domestic (Denmark)
- Foreign Countries
- No answer

Most important foreign countries of origin

Germany	26%
The Netherlands	2%
Switzerland	1%
Italy	1%

Basis: Respondents Danish Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021

For further information please contact



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THERE IS A PLACE – WHERE HEAVEN
AND EARTH SHARE THE SAME STAGE

Photo: Duff Development



OUR
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