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Protect & Prosper

Transnational visitor survey in the Wadden Sea region 2020/2021

Dutch Wadden Sea region

Kiel, Spring 2022

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The Wadden Sea
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Visitor Survey PROWAD LINK

- 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: The Netherlands



Map: © www.waddensea-worldheritage.org

Summary (1): Method

- **Visitor survey Dutch Wadden Sea region 2020/2021:** The results of the visitor survey in the Dutch Wadden Sea region 2020/2021 are based on a sample of n=757 (n = number of completed questionnaires). Furthermore, different target groups can be selected from the data and looked at in more detail, for example the type of accommodation used by first-time visitors vs. regular visitors of the Dutch Wadden Sea region.
- **Method and basis:** The visitor survey in the Dutch Wadden Sea region is conducted as an online survey of overnight guests and day trippers supplemented by a paper-pencil survey of overnight guests aged 14 years and older in accommodation establishments. Survey period of the reported data: 1 July to 6 November 2020 and 1 April to 30 June 2021.
- **Executing institutes:**
 - Conducting the survey:** NHL Stenden, The Netherlands
Wadden Sea World Heritage Netherlands, The Netherlands
Stenden ETFI, The Netherlands
 - Evaluation of the survey:** Institute for Tourism Research in Northern Europe (NIT), Germany



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

- **Travel experience:** Guests of the Dutch Wadden Sea region show a moderate loyalty. While 42% of the respondents are first-time visitors, 9% visit for the second time and 44% are regular guests, visiting their North Sea holiday destination for the third time or more.
- **Reason for travel:** Trips to the North Sea are predominantly holiday trips and short breaks (95%). For 7% of respondents, the trip was made to visit relatives/friends. Business trips play only a small role (3%).
- **Accommodation:** One third of the guests of the Dutch Wadden Sea stay in a bungalow park and another 13% in a camping site. One out of five guests booked a bed and breakfast/private room/Airbnb, only every tenth visitor chose a holiday unit (11%) or a hotel (10%). 7% of the visitors stayed at the marina.
- **Length of stay:** A trip to the Dutch Wadden Sea region lasts about 7.6 days. About a third of the visitors stay for 2 to 4 days (27%), while most guests stay a maximum of one week (38%) and only one out of ten guests visits the region on a day trip (8%).
- **Means of transport:** Most visitors travel to the North Sea by car (65%), 16% take the boat or ferry, 10% travel by bike and 6% by train.
- **Date of travel:** 50% of the reported trips to the Dutch Wadden Sea region were made during summer 2020, 32% in autumn 2020 and 18% in spring 2021.



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

- **Sources of information:** By far the most important information source for the Wadden Sea region are family and friends (50%). 33% of the North Sea guests visited specific websites of the region or place and almost the same proportion looked at accommodation websites (31%). Internet search engines follow with a share of 26%, online booking sites with 14%. About one third of the visitors reported using the host directory, tourist information of the region or place, and/or social media. The website www.visitwadden.nl was named by 5% as an information source about the travel destination.
- **Excursions:**
 - **Volume:** 85% of Dutch Wadden Sea region guests made at least one excursion from their holiday destination during their stay. The average number of excursions made during the stay is 7.3.
 - **Means of transport:** On their excursions, 75% of the Dutch Wadden Sea region visitors used the bicycle, 39% the car and 10% bus or train.
 - **Destinations:** 29% of North Sea visitors made at least one trip to mainland, 71% to an island. On average 3.4 day trips were made to the mainland, and 8.2 day trips to the islands.



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

- **Travel expenses:** The expenditure for the guests' trip to the Dutch Wadden Sea region amounts EUR 72 per day and person (accommodation: EUR 42; other services: EUR 30, excluding arrival/departure). Total travel expenses per trip amounts to EUR 1,014.
- **Travel company:** 93% of visitors at the North Sea travel in company. The average group size is 2.8 persons, whereby one fourth of the guests travelled with children (0-17 years). 13% of the Dutch Wadden Sea region visitors are accompanied by dogs.
- **Tourist offers:** The most frequently used tourist offers are culinary offers, the access to internet, opportunities for cycling and its signage, shopping, opportunities for hiking/walking and its signage as well as offers of regional products and specialties (usage intensity above 80%). All of those offers were evaluated with high ratings (at least 70% rated with “very good” or “good”). Visitors of the Dutch Wadden Sea also used offers such as bathing opportunities, public transport by ferry, shopping in cities and shopping centres and day trip opportunities rather frequently (usage intensity between 60% to 79%). Among the less frequently used tourist offers (still with a usage intensity between 40 to 59%), tourist information offices, guided hiking tours and Wadden Sea exhibition and visitor centres received very high ratings (81%, 77%, and 72% ratings with “very good” and “good”, respectively). Swimming pools/water parks showed the lowest positive ratings (49% ratings with “very good” and “good”).



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

- **Information on the Wadden Sea:** The internet is by far the most frequently used information medium for visitors to the Dutch Wadden Sea region. Every second person used it to get information about the Wadden Sea region. Every third person informed themselves by using leaflets/brochures and information boards, every fifth person got information via the tourist information.
- **Reasons for travelling:** The most important reasons for traveling to the current destination are the landscape and location (78%) and the opportunities to relax (77%), closely followed by the nature with its flora and fauna (71%). Almost two third of the respondents named the beach, the sea, opportunities to go for a swim (60%) as well as cycling opportunities (59%).
- **Importance of environmental aspects at the destination:** To experience intact nature during the holiday (91%), the protection of nature at the holiday destination (88%) and staying away from the hustle and bustle of tourist crowds (88%) is (very) important for almost all respondents. For most visitors of the Dutch Wadden Sea region the following aspects are also very important or important: specifically learning about the nature at the holiday destination (80%) and learning about the region/place (73%).
- **Attitude towards nature and environmental protection aspects while on holiday:** 24% of Dutch Wadden Sea region guests are willing to spend more money for a hotel or accommodation if it has an eco-label, 86% prefer businesses that show they are contributing to environmental and nature protection, 44% are willing to donate a small amount of money to financially support nature protection at the destination and 23% state the importance of a selection of specialised offers regarding the Wadden Sea theme.
- **Awareness of the Wadden Sea World Heritage status:** With 96%, almost all 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 53% of guests, the protection of the Wadden Sea as a protected nature area/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 (38%).
- **Interest in nature experience offers:** 27% of the respondents are interested in nature experience trails. Every fourth guests would like to do a trip to the islands with a guide (25%), do a trip to the seal colonies, do a guided saltmarsh, dune or beach tour and visit a Wadden Sea exhibition centre (each 24%). A tidal flat hiking tour is interesting for one out of five guests of the Dutch Wadden Sea. Guided birdwatching tours (15%), a boat trip (17%) or a presentation on nature and the environment (13%) are less interesting to the visitors.
- **Restrictions due to nature conservation regulations:** Most respondents do not feel restricted by nature conservation regulations in the Wadden Sea due to the protective status as a World Heritage/National Park during their holiday. Only 5% state that they feel restricted by nature conservation regulations.
- **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 Dutch Wadden Sea region is 8.4 on a 10-point-scale with 10 = highly likely and 0 = not likely at all. 82% of respondents on the North Sea in the Netherlands can imagine to recommend the region as a holiday destination (with ratings of 8 or higher).



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Summary (7): Visitor structure

- **Age:** Two third of the visitors at the Dutch Wadden Sea region are 50 years and over (average: 53.0 years).
- **Gender:** 59% of the North Sea visitors in the Netherlands are female, 40% are male.
- **Children/young people (0-17 years) in the household:** One fourth of domestic North Sea visitors live with children below 18 years in the household. The average household size is 2.6 persons.
- **Net household income:** Half of North Sea visitors overall have a net household income of EUR 3.000 or more. Every fifth reported a household income of EUR 2.000 to EUR 2.999.
- **Source markets:** 91% of respondents from the Dutch Wadden Sea region are domestic travelers. The main source market for North Sea visitors in the Netherlands is Germany (7%).



Method description (1)

- **Survey method:** Online survey supplemented by a paper-pencil survey
- **Target group:** Day trippers and overnight guests to the Dutch Wadden Sea National Park region
- **Language:** Dutch, English
- **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.

- **Number of respondents:** 757 respondents in total



Method description (2)

Online survey:

- **Target group:** Day trippers and overnight guests to the Danish Wadden Sea National Park region
- **Link distribution:**
 - via “Welcome home” email with a link to the survey from one rental company operating in the whole Wadden Sea area, but mainly on the islands
 - Social media campaign through “Visit Wadden”,
 - Distribution of business cards to some holiday homes and holiday parks, marinas and small scale entrepreneurs, containing the QR code to the survey, one side to the Dutch version, the other side to the German version.
- opportunity to take part in a **prize draw** after filling in the survey
- **Number of respondents:** 576 online

Paper-pencil survey:

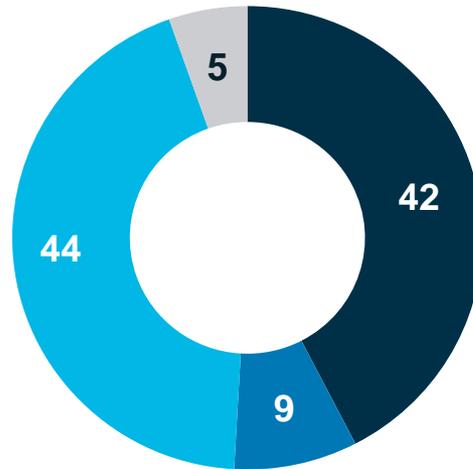
- **Target group:** Overnight guests to the Danish Wadden Sea National Park region aged 14 years and older
- **Distribution of the questionnaires:**

Announcement of the survey on the mainland and islands with the request to partners for supporting the survey by passing on the questionnaires. During the survey period, about 20 partners (mainly on the mainland) gave the questionnaires to overnight guests. Due to the very low response rate, most partners refrained from supporting the survey in spring. They preferred the online survey.
- **Number of respondents:** 181 paper-pencil

Travel experience with the Wadden Sea Region

in %

Dutch 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

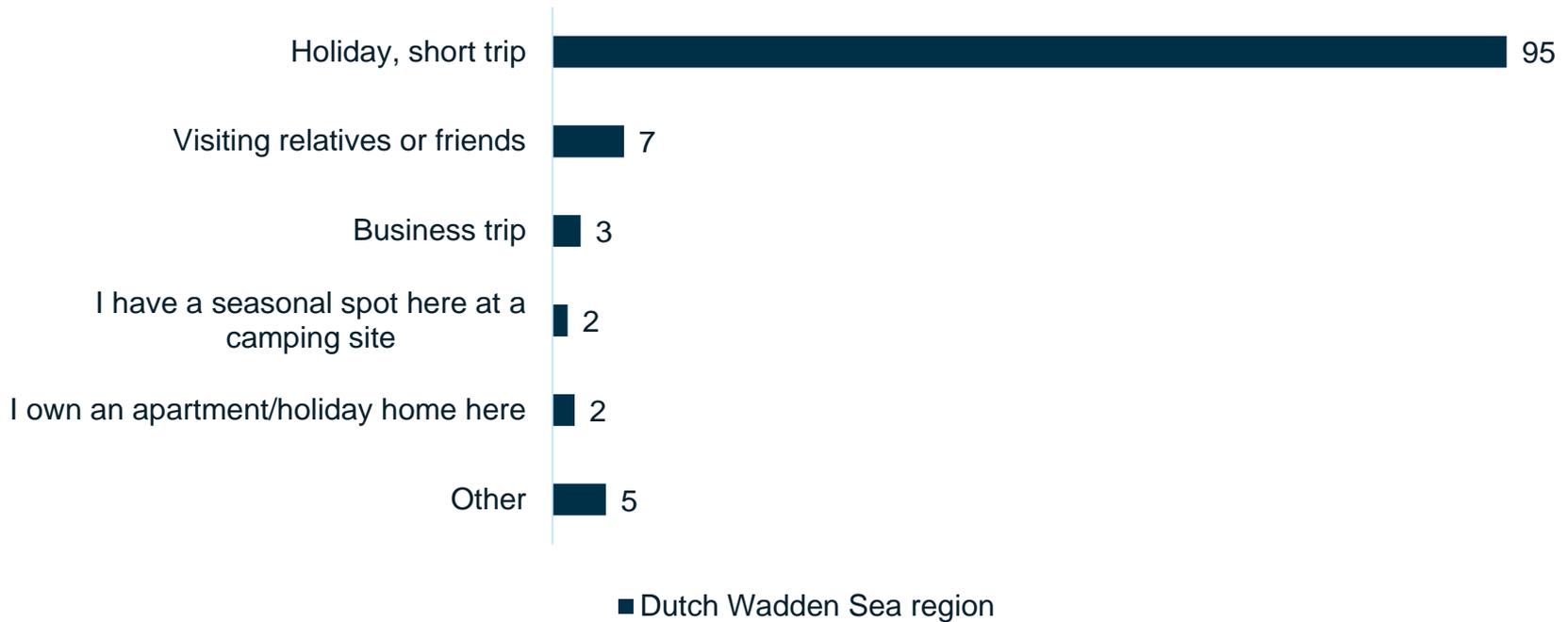
Basis: Respondents Dutch Wadden Sea region (n=757) in summer 2020, autumn 2020 and spring 2021

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



Travel purpose

in %



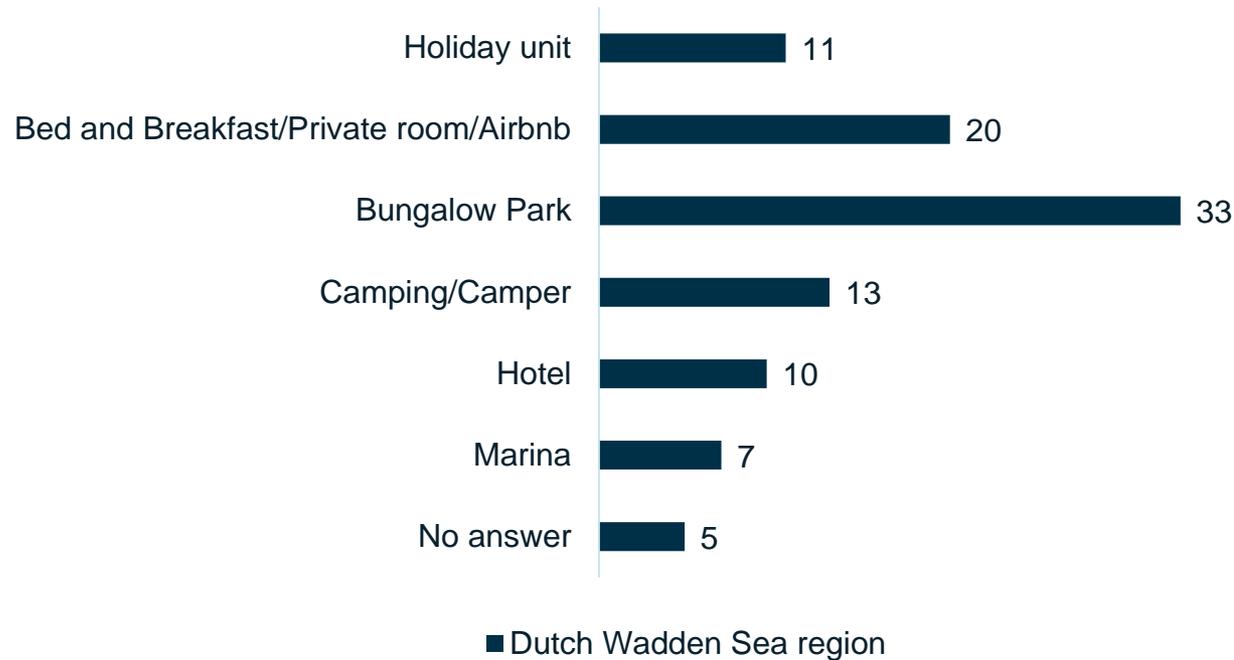
Basis: Respondents Dutch Wadden Sea region (n=757) in summer 2020, autumn 2020 and spring 2021
Question: What is the reason of your travel? (multiple answers)



Accommodation

in %

Dutch Wadden Sea region



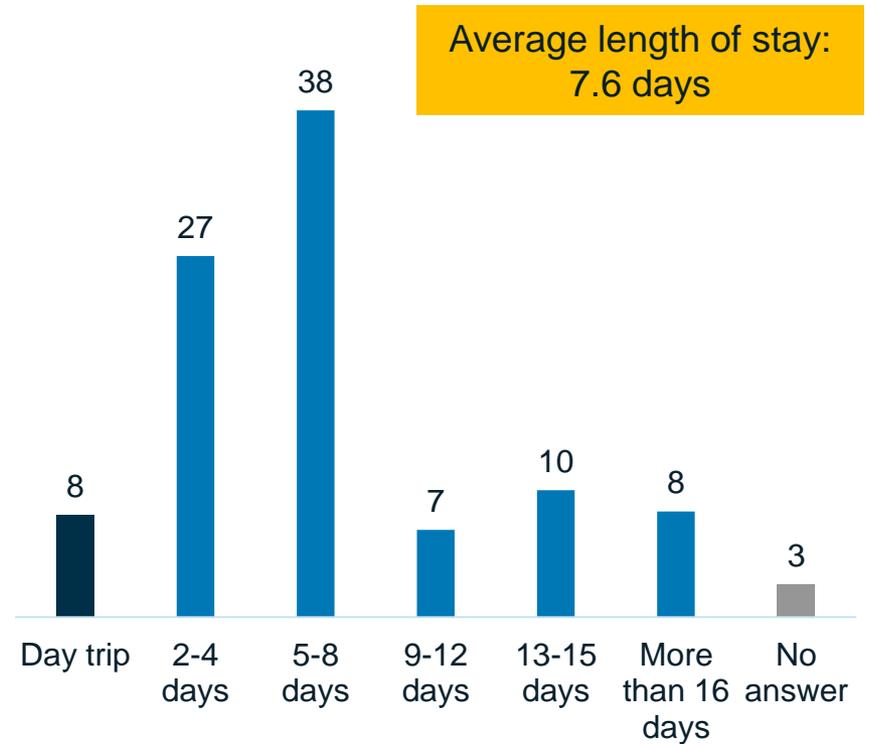
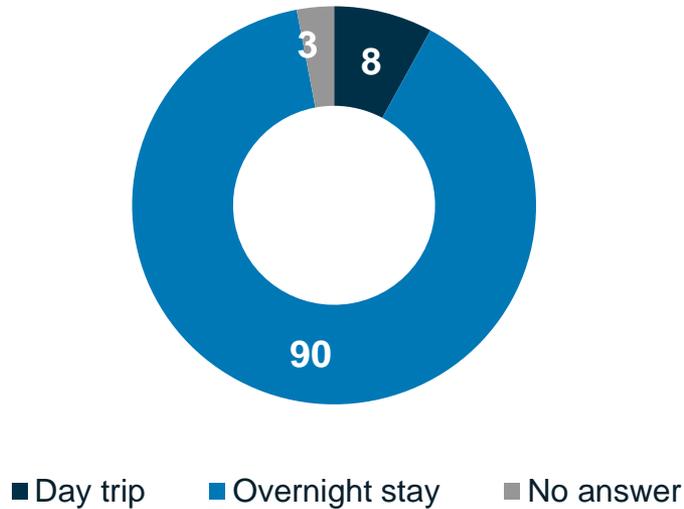
Basis: Respondents Dutch Wadden Sea region (n=757) in summer 2020, autumn 2020 and spring 2021
Question: What type of accommodation do you currently occupy?



Length of stay

in %

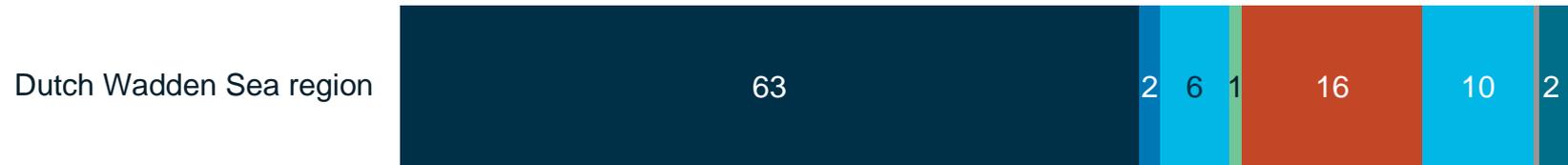
Dutch Wadden Sea region



Basis: Respondents Dutch Wadden Sea region (n=757) 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 %



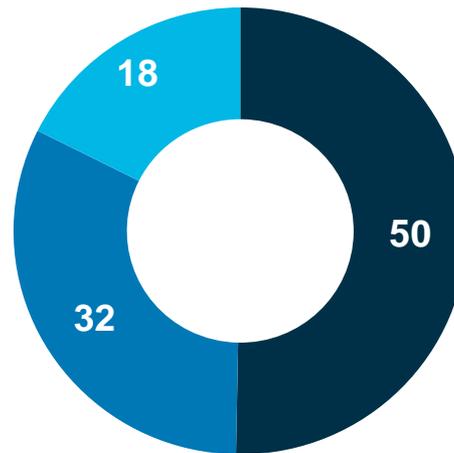
■ Car – fuel/diesel/hybrid ■ Car – electric/hydrogen ■ Train ■ Bus ■ Plane ■ Boat/ferry ■ Bicycle ■ Other ■ No answer

Basis: Respondents Dutch Wadden Sea region (n=757) 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 %

Dutch Wadden Sea region



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

Basis: Respondents Dutch Wadden Sea region (n=757), in summer 2020, autumn 2020 and spring 2021.

Sources of information (TOP 10)

in %

| Sources of information (TOP 10) | Dutch Wadden Sea region |
|--|-------------------------|
| Family, friends | 50 |
| Specific websites of the region/place | 33 |
| Accommodation website | 31 |
| Internet search engines | 26 |
| Online booking sites, e.g. for holiday units or hotel rooms | 14 |
| Social media | 9 |
| Host directory | 9 |
| Tourist information in the region/place | 9 |
| Website www.visitwadden.nl | 5 |
| Travel literature, travel guides | 4 |

Basis: Respondents Dutch Wadden Sea region (n=757) in summer 2020, autumn 2020 and spring 2021
 Question: Where did you find information about your current travel destination? (multiple answers)

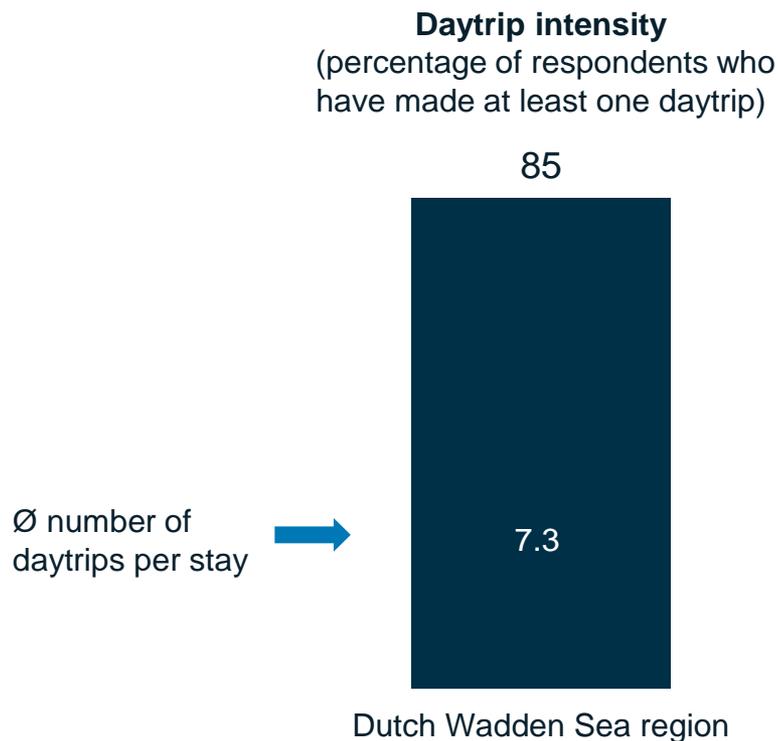
Sources of information (TOP 11-20)

in %

| Sources of information (TOP 11-20) | Dutch Wadden Sea region |
|--|-------------------------|
| Brochure of the rental accommodation | 3 |
| Regional guide (e.g. vvv gids) | 3 |
| Journalistic reports on the internet | 3 |
| Newspaper, news magazine | 2 |
| Online evaluation portal | 2 |
| TV | 1 |
| Someone else assembled the information | 1 |
| Travel agency, tour operator | 0 |
| I have not informed myself beforehand | 10 |
| Others | 6 |

Basis: Respondents Dutch Wadden Sea region (n=757) in summer 2020, autumn 2020 and spring 2021
 Question: Where did you find information about your current travel destination? (multiple answers)

Daytrips while staying overnight



Basis: Respondents Dutch Wadden Sea region in summer 2020, autumn 2020 and spring 2021
Question: Did you do any day trips from your current location? (n=757)
Question: If yes, how many such daytrips did you do? (n=642)



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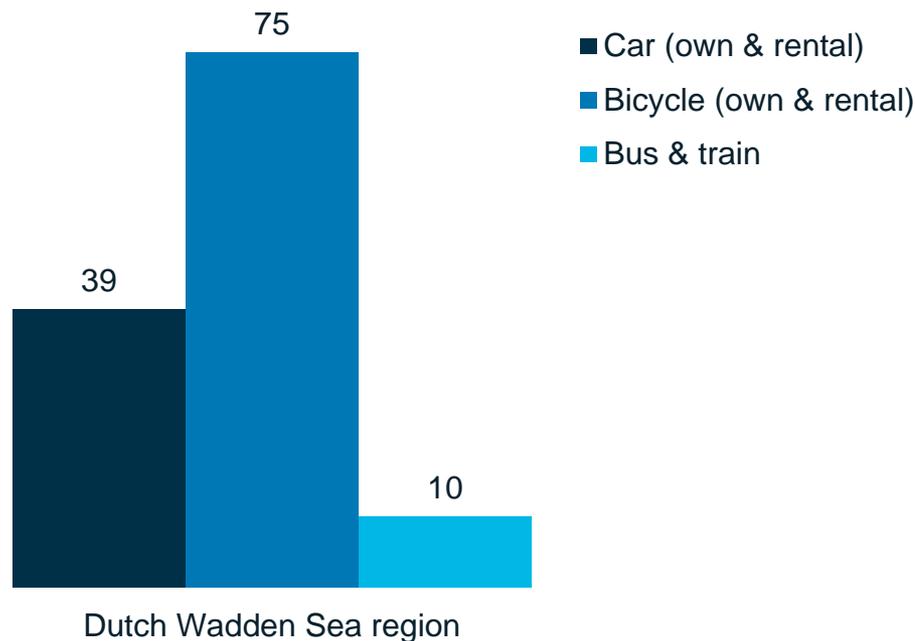


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Trips during overnight stays: Means of transport

in %



Basis: Respondents who did at least one trip during their stay, Dutch Wadden Sea region (n=642) 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?

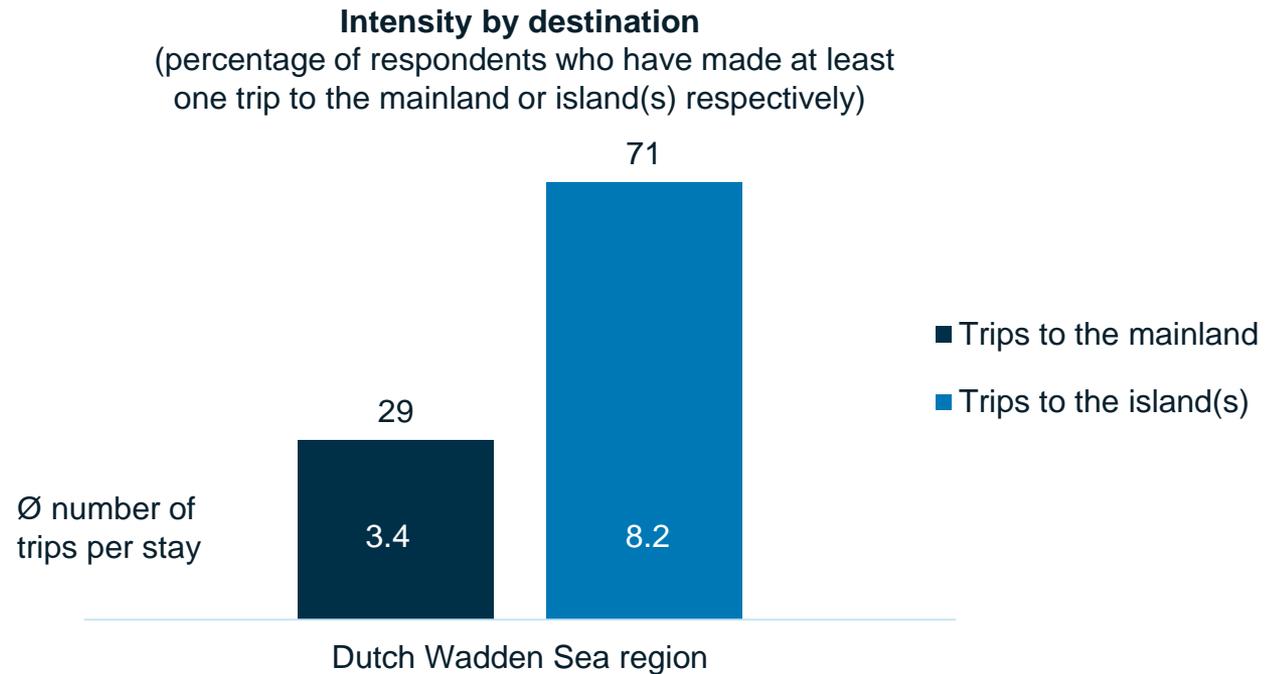
Trips during overnight stays: Means of transport (details)

in %

| Means of transport | Dutch Wadden Sea region |
|-----------------------|-------------------------|
| Own car | 39 |
| Rented/shared car | 1 |
| Own bicycle | 37 |
| Rented/shared bicycle | 43 |
| Bus or train | 10 |

Basis: Respondents who did at least one trip during their stay, Dutch Wadden Sea region (n=642) 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: destinations



Basis: Respondents who did at least one trip during their stay Dutch Wadden Sea region (n=642) 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.)

Travel expenses per person per day

in EUR

| 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 | |
| Dutch Wadden Sea region | 42,- | 30,- | 72,- | 1014,- |

Basis: Respondents Dutch Wadden Sea region who did answer the number of persons they travel with, the number of days they stay and their expenditure (n=612) in summer 2020, autumn 2020 and spring 2021

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.)



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Travel in company

in %

■ Alone ■ In company ■ No answer



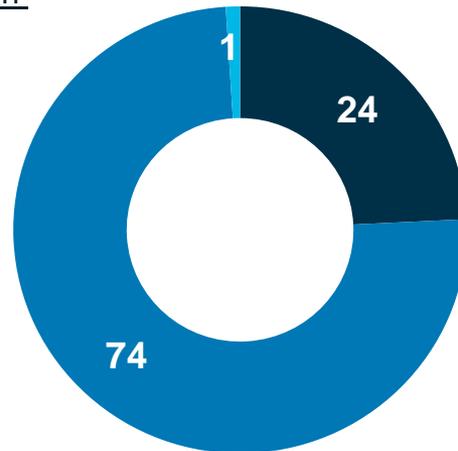
Basis: Respondents Dutch Wadden Sea region (n=757) in summer 2020, autumn 2020 and spring 2021
Question: How many people are included in the above estimate? How many people belong to your party, including you?



Travel in company: travelling with children

in %

Dutch Wadden Sea region



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

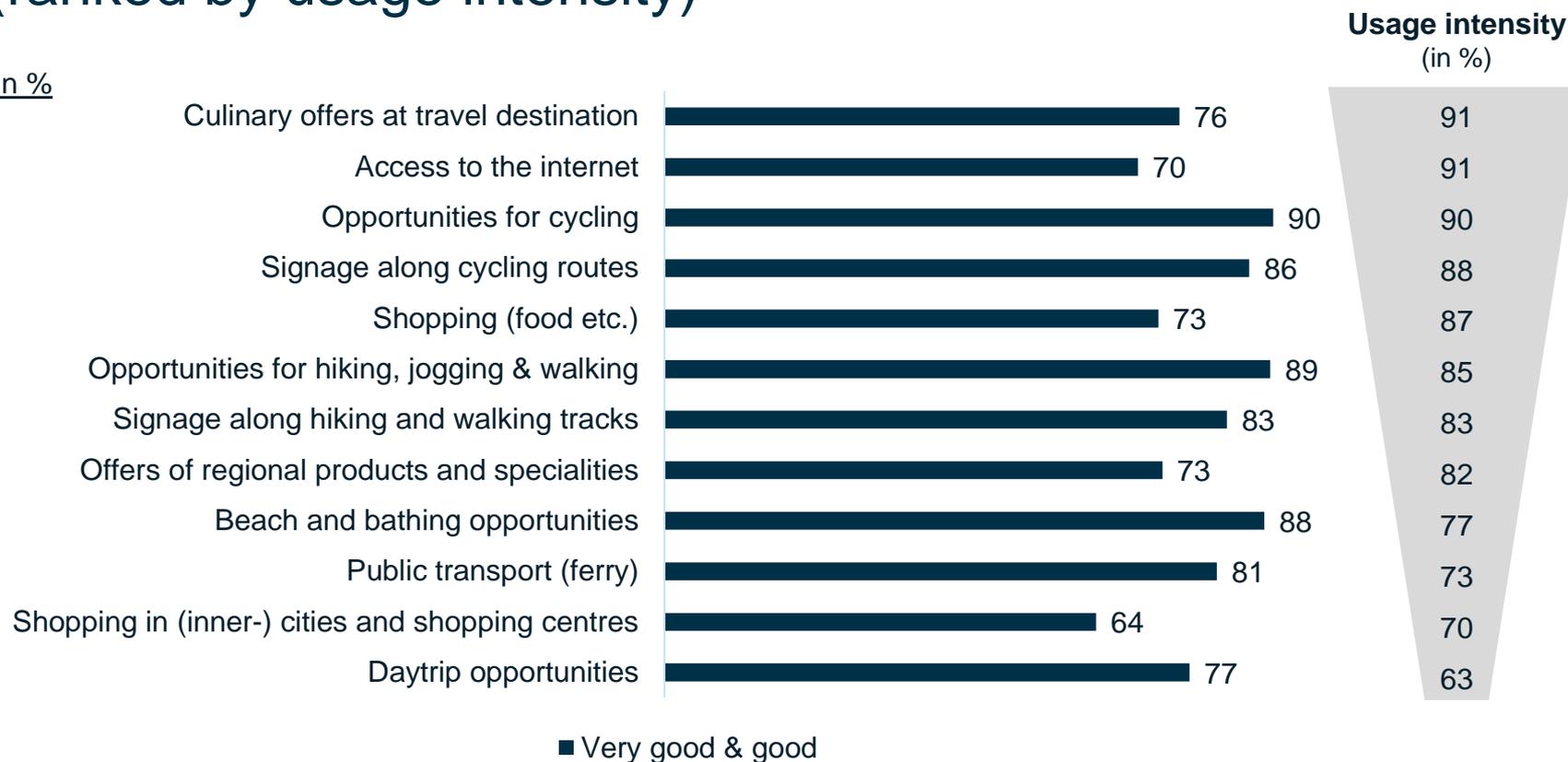
Travelling
with dogs:
13%

Basis: Respondents Dutch Wadden Sea region (n=640) 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)?

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

in %



Basis: Respondents with indication to respective offer, Dutch 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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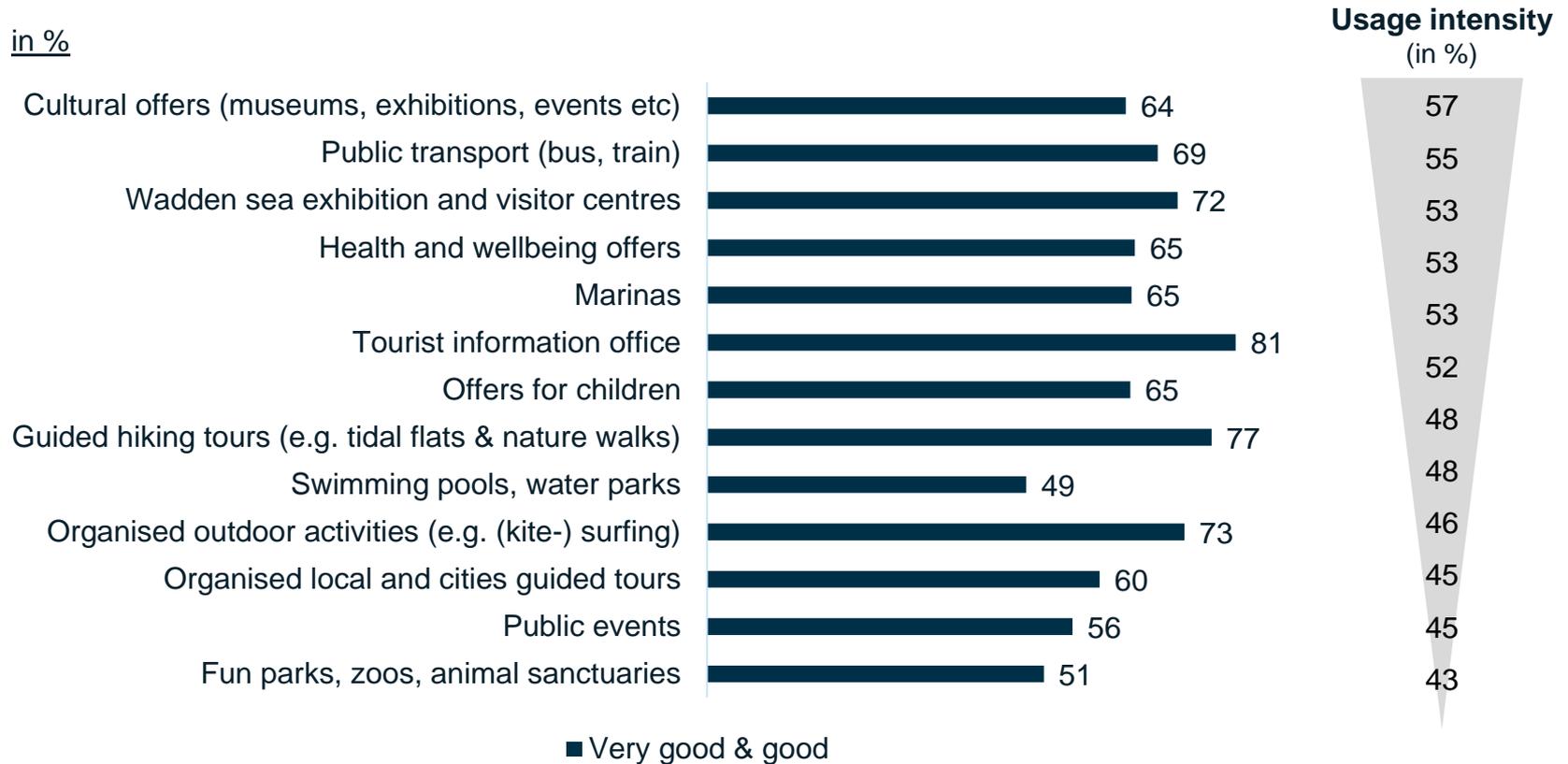
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Tourist offers (II): Ratings and usage intensity (ranked by usage intensity)

in %

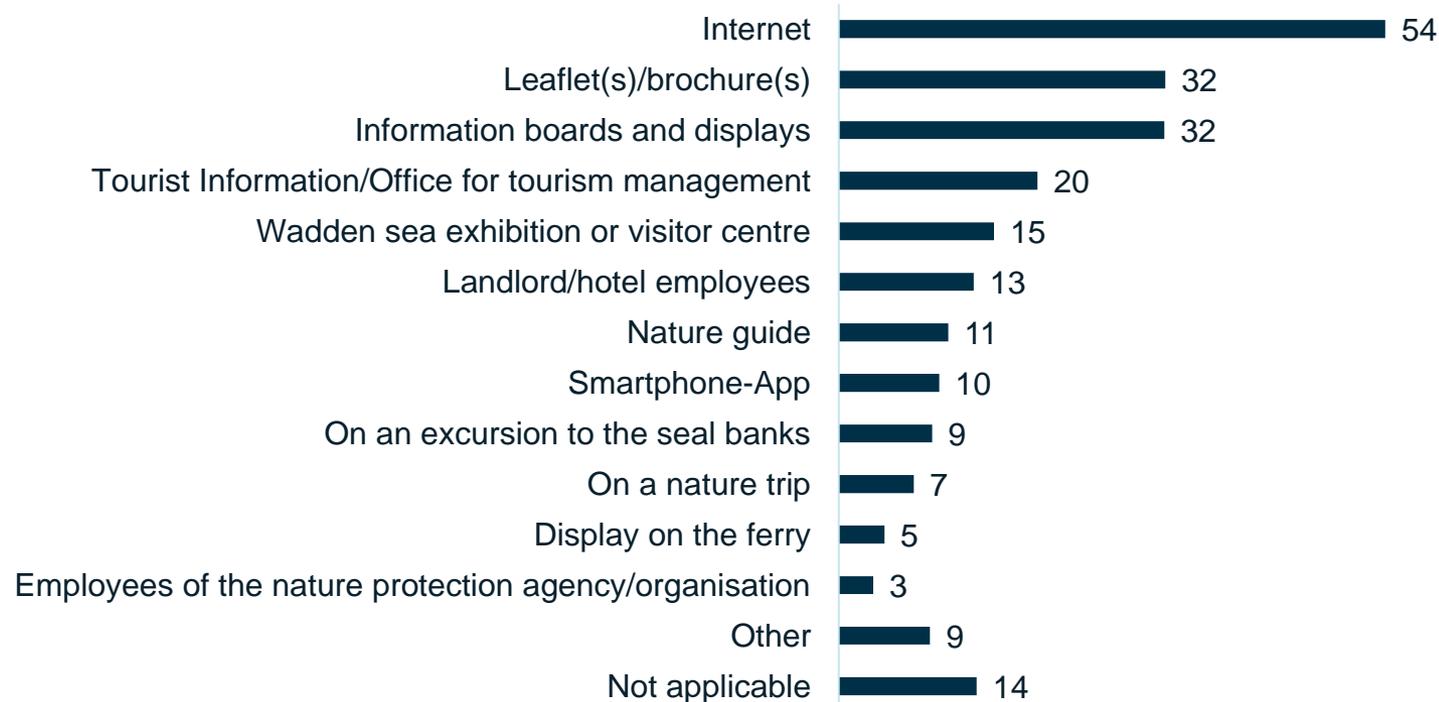


Basis: Respondents with indication to respective offer, Dutch Wadden Sea region in summer 2020, autumn 2020 and spring 2021

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.

Sources of information about the Wadden Sea on site

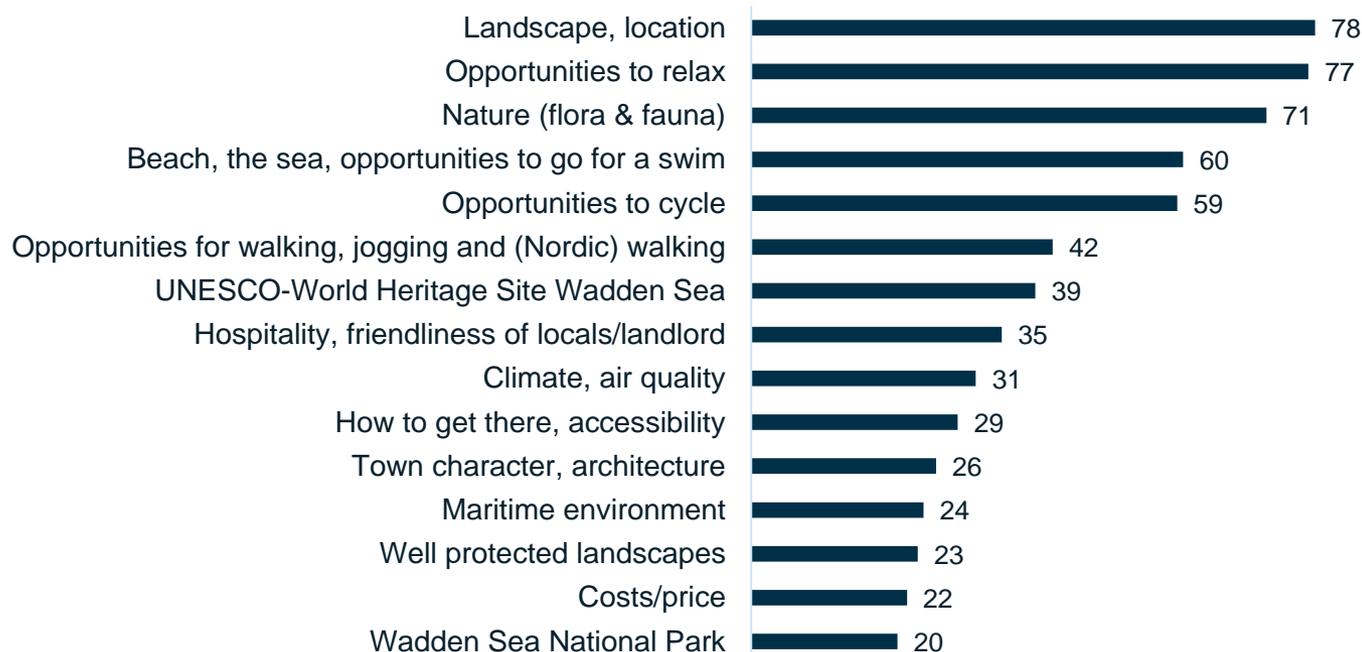
in %



Basis: Respondents Dutch Wadden Sea region (n=757) 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 Dutch Wadden Sea region (TOP 15)

in %



Basis: Respondents Dutch Wadden Sea region (n=757) 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)



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

in %



Basis: Respondents Dutch Wadden Sea region (n=757) 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 Dutch Wadden Sea region (n=757) 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**.

24

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

86

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

44

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

23

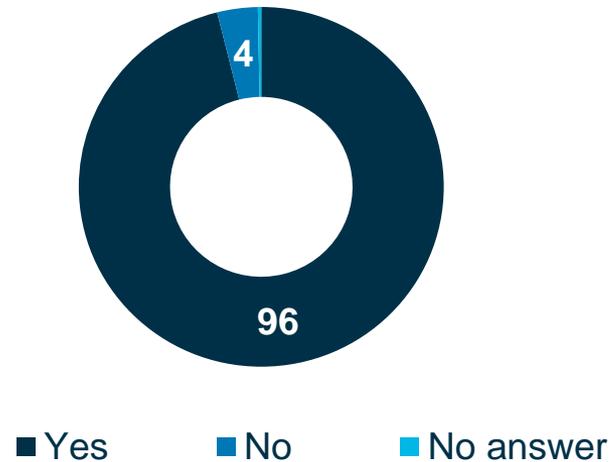
Basis: Respondents Dutch Wadden Sea region (n=757) in summer 2020, autumn 2020 and spring 2021
Question: With which of the following statements do you agree? (Multiple answers.)

Awareness of World Heritage designation

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

in %

Dutch Wadden Sea region

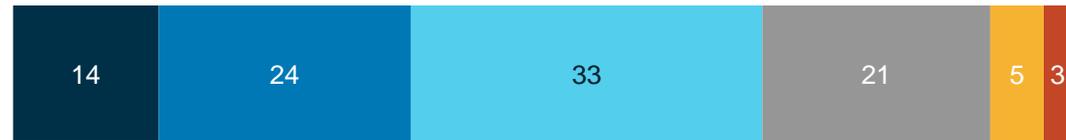


Basis: Respondents Dutch Wadden Sea region (n=757) in summer 2020, autumn 2020 and spring 2021
Question: Did you know that the Wadden Sea is a World Heritage site?

Importance of the UNESCO World Heritage status and as a protected nature area/national park 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 Dutch Wadden Sea region (n=757) 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 Dutch Wadden Sea region (n=757),

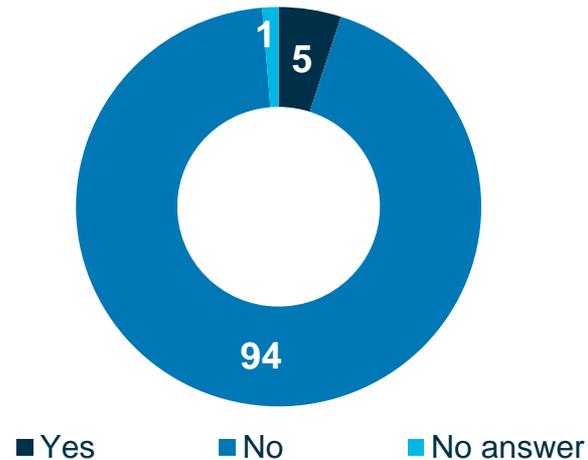
Question: Which of the following nature experience offers are of interest to you during your current stay? (Multiple answers)

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/well protected landscapes during your stay?

in %

Dutch Wadden Sea region

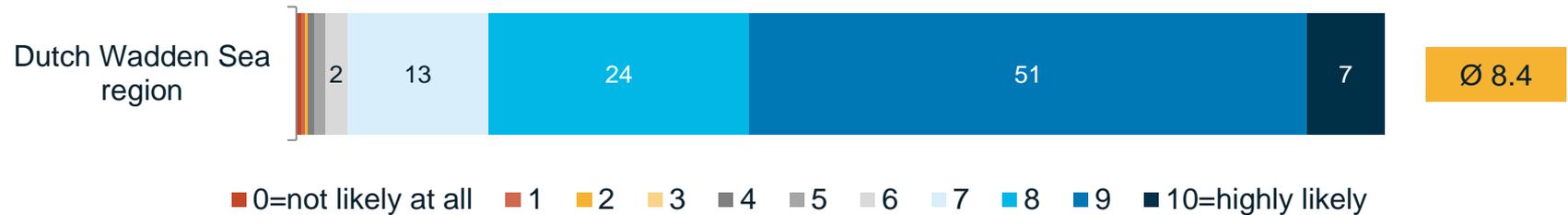


Basis: Respondents Dutch Wadden Sea region (n=757) in summer 2020, autumn 2020 and spring 2021

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

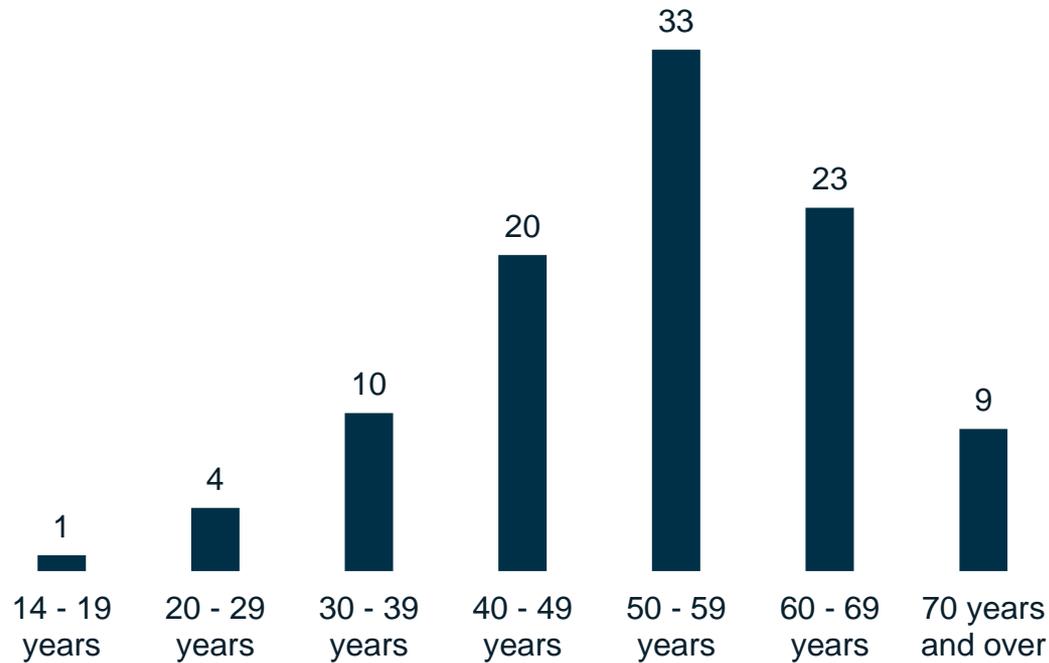
in %



Basis: Respondents with indication, Dutch Wadden Sea region (n=751) in summer 2020, autumn 2020 and spring 2021
Question: How likely is it that you recommend this destination to your family, friends and colleagues?

Age of the respondent(s)

in %



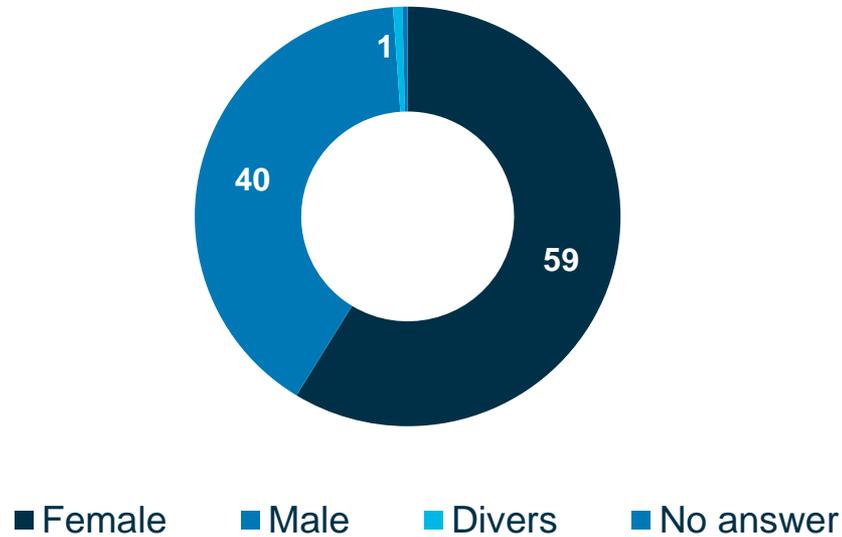
Average age:
53.0 years

Basis: Respondents Dutch Wadden Sea region (n=757) in summer 2020, autumn 2020 and spring 2021, percentage missing to 100% = no answer

Gender of respondent(s)

in %

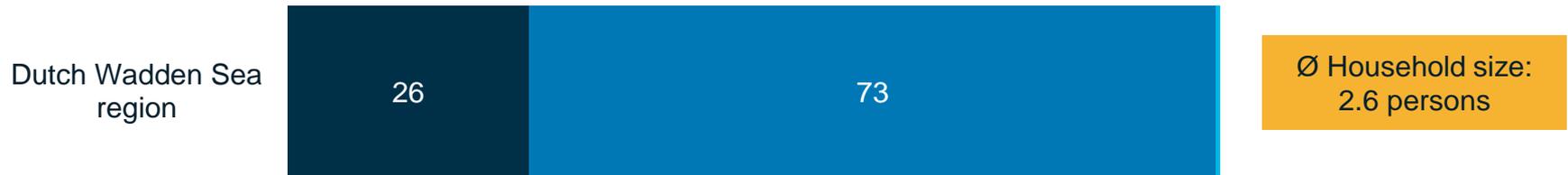
Dutch Wadden Sea region



Basis: Respondents Dutch Wadden Sea region (n=757) in summer 2020, autumn 2020 and spring 2021

Household structure of respondent(s)

in %

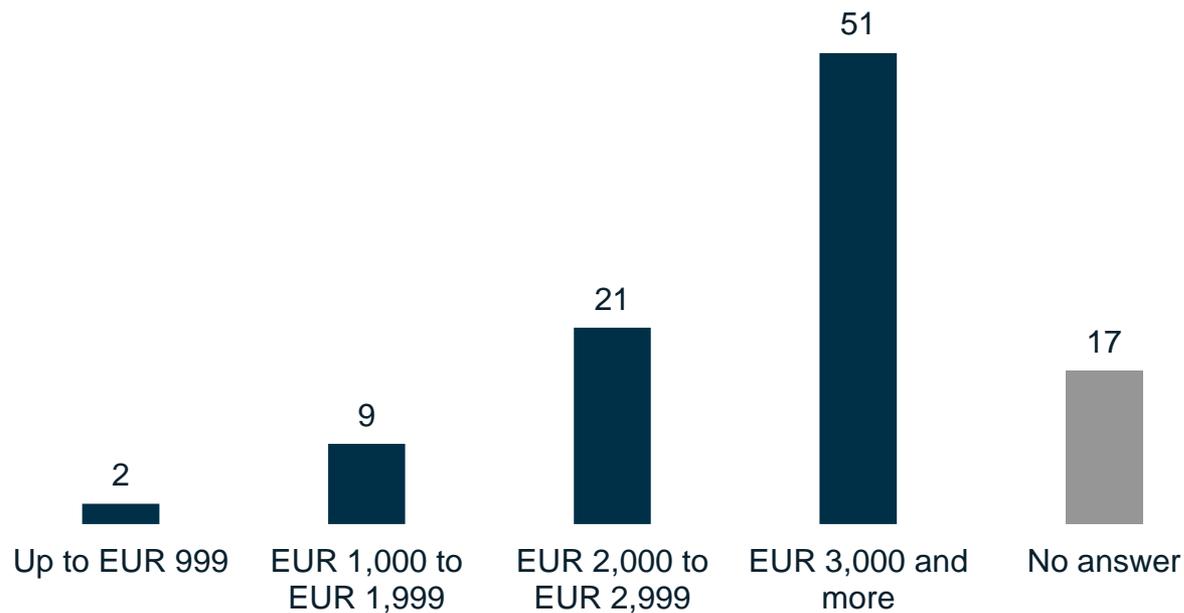


- With children (0-17 years) in household
- No children (0-17 years) in household
- No answer

Basis: Respondents Dutch Wadden Sea region (n=757) in summer 2020, autumn 2020 and spring 2021

Net household income of respondent(s)

in %

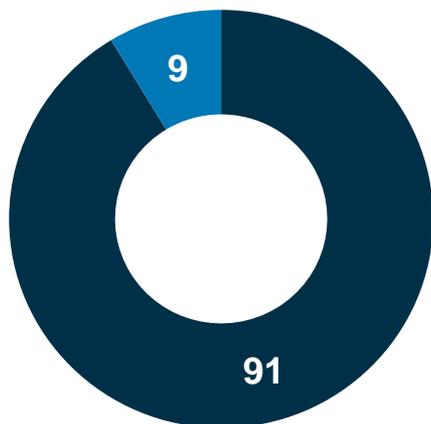


Basis: Respondents Dutch Wadden Sea region (n=579) in summer 2020, autumn 2020 and spring 2021, net monthly income of all persons in your household, after deduction of taxes and social security



Residence of respondent(s)

in %



- Domestic (The Netherlands)
- Foreign Countries

| Most important foreign countries of origin | |
|--|------|
| Germany | 7% |
| Switzerland | 0,3% |
| Italy | 0,1% |

Basis: Respondents Dutch Wadden Sea region (n=757) 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: Jeff Wevers/amy



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