

PROWAD LINK

Protect & Prosper

Transnational visitor survey in the Wadden Sea region 2020/2021

German Wadden Sea region

Kiel, Spring 2022

© A. Schnabler



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

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 Administration (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.
 - 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.



United Nations
Educational, Scientific and
Cultural Organization



The Wadden Sea
World Heritage Site
since 2009



Nationalpark
Wattenmeer



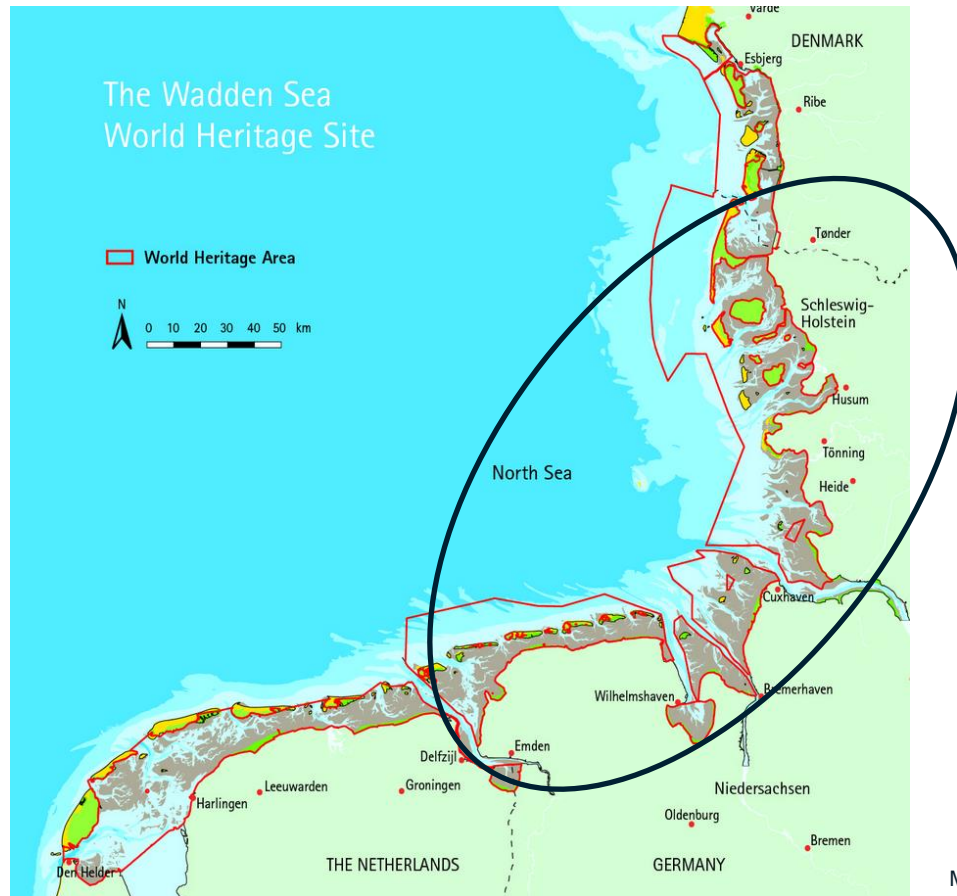
Interreg
North Sea Region
PROWAD LINK
European Regional Development Fund



EUROPEAN UNION

PROWAD LINK

Area of investigation: Germany



Map: © www.waddensea-worldheritage.org

Summary (1): Method

- **Visitor survey German Wadden Sea region 2020/2021:** The results of the visitor survey in the German Wadden Sea region 2020/2021 are based on a case number of n=640 cases (Schleswig-Holstein: n=330, Lower Saxony n=310). The data is broken down into the two sub-areas North Sea Schleswig-Holstein (SH) and North Sea Lower Saxony (LS). Furthermore, different target groups can be selected from the data and looked at in more detail, for example the difference in percentage between first time visitor travelling without children in Lower Saxony versus Schleswig-Holstein.
- **Method and basis:** The visitor survey in the German Wadden Sea region is a paper-pencil survey of overnight guests aged 14 years and older in commercial and private accommodation (sanatoria, rehabilitation clinics, youth hostels and campsites are excluded). The sampling was based on the guests (14 years and older) of the current accommodation offer, for which the results are representative. Survey period of the reported data: 1 July to 6 November 2020 and 1 April to 30 June 2021.
- **Executing institute:**
 - Conducting and 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:** Guests of the German Wadden Sea region show a high loyalty. 66% of the respondents are regular guests, visiting their North Sea holiday destination for the third time or more. The proportion of regular guests is significantly higher in Lower Saxony (LS) than in Schleswig-Holstein (SH).
- **Reason for travel:** Trips to the North Sea, whether to Schleswig-Holstein or Lower Saxony, are predominantly vacation trips and short breaks (German Wadden Sea region as a whole: 98%). For 6% of respondents, the trip was made to visit relatives/friends. Business trips hardly play a role.
- **Accommodation:** The majority of the surveyed guests of the German Wadden Sea region stayed in a holiday flat or a holiday home (64%). In Schleswig-Holstein, this proportion is slightly above the average for the region (71%), while in Lower Saxony it is slightly below (56%). About a quarter of the guests stayed in a hotel or boarding house. In Lower Saxony, this share is above average at 34%.
- **Length of stay:** A trip to the German Wadden Sea region lasts about 10 days. About half of North Sea visitors stay a maximum of one week (46%). A trip to the North Sea in Lower Saxony lasts on average 0.8 days longer than trips to the North Sea in Schleswig-Holstein.
- **Means of transport:** Most visitors travel to the North Sea by car (81%), 17% take the train. People travel to the North Sea in Lower Saxony even more frequently by car than to the North Sea in Schleswig-Holstein (84% vs. 77%). The opposite is true for trips by train (North Sea SH: 18%, North Sea LS: 15%).
- **Date of travel:** 40% of the reported trips to the German Wadden Sea region were made during summer 2020, 34% in autumn 2020 and 26% in spring 2021. In Lower Saxony is the share of summer trips higher and the share of spring trips lower than in Schleswig-Holstein.

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

- **Sources of information:** The most important information source for the Wadden Sea region are family and friends (37%). 35% of the North Sea guests visited specific websites of the region or place, and the same proportion looked at accommodation websites. Internet search engines follow with a share of 19%, online booking sites with 16%. 11% use the host directory of the region or the place, and 10% read travel literature/travel guides. Looking at the regions, information from family/friends are used significantly more often by guests at the North Sea in Lower Saxony, while at the North Sea Schleswig-Holstein, specific websites of the regions/place, internet search engines and online booking sites are consulted more often.
- **Excursions:**
 - **Volume:** 69% of German Wadden Sea region guests make at least one excursion from their holiday destination during their stay. The proportion of excursions at the North Sea in Schleswig-Holstein is much higher than at the North Sea in Lower Saxony (84% vs. 54%). The average number of excursions made during the stay is 7.0 – a little higher in Lower Saxony and a little lower in Schleswig-Holstein.
 - **Means of transport:** On their excursions 66% of the German Wadden Sea region visitors used the bicycle, 48% the car and 12% bus or train. The share of car-users is much higher at the Schleswig-Holstein Wadden Sea region (54% in SH vs. 37% in LS). On the other hand, trains and buses are used more often during excursions starting in Schleswig-Holstein than in Lower Saxony (15% vs. 7%).
 - **Destinations:** 43% of North Sea visitors made at least one trip to mainland, 60% to an island. In Lower Saxony, the share of day trippers who visited a mainland destination during their stay is higher than in Schleswig-Holstein (55% vs. 47%). 35% of Schleswig-Holstein Wadden Sea region visitors made a trip to a hallig.



United Nations
Educational, Scientific and
Cultural Organization



The Wadden Sea
World Heritage Site
since 2009



Nationalpark
Wattenmeer



Interreg
North Sea Region
PROWAD LINK
European Regional Development Fund



EUROPEAN UNION

PROWAD LINK

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

- **Travel expenses:** On average guests at the German Wadden Sea region reported travel expenses of EUR 76 per day and person (accommodation: EUR 46, other services: EUR 31, excluding the costs for arrival/departure). With an average of EUR 80 per day and person, stays at the Wadden Sea of Lower Saxony lead to higher expenses per day than trips to the North Sea of Schleswig-Holstein (EUR 73).
- **Travel company:** 87% of visitors at the North Sea travel in company. The average group size is 2.3 persons, with little difference between the size of the travel groups to the North Sea in Schleswig-Holstein and Lower Saxony (North Sea SH: 2.4 persons; North Sea LS 2.3 persons). 4% of German Wadden Sea region visitors – in Schleswig-Holstein as well as in Lower Saxony – are accompanied by dog(s).
- **Tourist offers:** The opportunities and signage for hiking, jogging, Nordic walking and cycling, the beach/swimming opportunities, guided hiking tours and Wadden Sea exhibition and visitor centres score best (at least 40% rated with “very good”). Medium ratings (20 to 39% with “very good”) are given to shopping facilities, tourist information, health and wellbeing offers, swimming pools, offers for children, daytrip opportunities, organised local and cities guided tours, organised outdoor activities, public transport (ferry score a little better than bus and train), culinary offers and access to internet. Marinas, cultural offers, zoos and animal sanctuaries, public events get the lowest share of very good ratings (less than 20%).



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

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

- **Information on the Wadden Sea:** Two thirds of the North Sea guests have received information on the Wadden Sea via information boards on site (65%). Another important information channel for the guests are leaflets or brochures on the subject (36%) as well as Wadden Sea exhibitions or visitor centres (28%), the tidal flat tour guides (27%) and the internet (26%). On the Wadden Sea of Lower Saxony, education trails and landlord/hotel employees are somewhat more important information sources than on the North Sea of Schleswig-Holstein where employees of nature protection agencies/organisations play a higher role.
- **Reasons for travelling:** By far the most frequently mentioned travel decision reasons for the North Sea are the recreational opportunities (85%), the climate/air (80%) and the beach/sea/swimming opportunities (78%). The landscape/location is also an important reason for choosing a destination for more than two thirds of the respondents (69%).
- **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 (94% each). For most visitors of the German Wadden Sea region the following aspects are also very important or important: Staying away from the hustle and bustle of tourist crowds (80%), learning about the holiday destination (78%) and specifically learning about nature at the holiday destination (75%). For North Sea guests in Schleswig-Holstein, it is more often (very) important to learn something about the region, that you can reach the destination by public transport and to have the possibility of getting around by public transport at the holiday destination.



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

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

- **Attitude towards nature and environmental protection aspects while on holiday:** 28% of German Wadden Sea region guests are willing to spend more money for a hotel or accommodation if it has an eco-label, 33% prefer businesses that show they are contributing to environmental and nature protection, 45% are willing to donate a small amount of money to financially support nature protection at the destination and 24% state the importance of a selection of specialised offers regarding the Wadden Sea theme.
- **Awareness of the Wadden Sea World Heritage status:** With 97%, almost all guests are aware of the World Heritage status of the Wadden Sea. On the North Sea coast of Lower Saxony this is even true for 99% (North Sea SH 95%).
- **Relevance of status as National Park, World Heritage Site and biosphere reserve:**
 - For 53% of guests, the protection of the Wadden Sea as a national park was a (very) important reason when planning the journey (SH: 47%, LS: 59%).
 - In contrast, the designation of the Wadden Sea as a World Heritage Site is less often very important or important for the travel decision (total: 40%, SH: 35%, LS: 45%).
 - The importance of the status as a UNESCO Biosphere Reserve is named by 37% of all guests of the German Wadden Sea region (SH: 33%, LS: 40%).



Summary (7): The stay at the North Sea – Reasons, willingness to recommend and information on Wadden Sea

- **Interest in nature experience offers:** 45% of the respondents are interested in tidal flat hiking tours, every third guest is interested in visiting Wadden Sea exhibitions or visitor centres (34%), nature experience trails (33%) or guided saltmarsh tours (32%). Excursions to the seal banks are interesting for 27% of German Wadden Sea region guests. Guided birdwatching tours (21%) and presentations on nature and the environment (20%) and guided trips to the islands are an option for about one in five guests. Guests on the North Sea coast of Schleswig-Holstein show above-average interest in tidal flat hiking tours, trips to seal colonies and an island/hallig-trips with ranger as guide.
- **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 Site/National Park during their holiday. Only 1% 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 German Wadden Sea region is 8.9 on a 10-point-scale with 10 = highly likely. 87% of respondents on the North Sea in Schleswig-Holstein and 90% of respondents on the North Sea in Lower Saxony can imagine to recommend the region as a holiday destination (with ratings of 8 or higher).



United Nations
Educational, Scientific and
Cultural Organization



The Wadden Sea
World Heritage Site
since 2009



Nationalpark
Wattenmeer



Interreg
North Sea Region
PROWAD LINK
European Regional Development Fund



EUROPEAN UNION

PROWAD LINK

Summary (8): Visitor structure

- **Age:** Three quarter of the visitors at the German Wadden Sea region are 50 years and older (average: 57.8 years); whereby visitors at the North Sea in Schleswig-Holstein are a little younger (56.7 years) than at the North Sea in Lower Saxony with an average of 59.0 years.
- **Gender:** 59% of North Sea visitors in Germany are female, 38% are male.
- **Children/young people (0-17 years) in the household:** One fifth of domestic North Sea visitors live with children (0-17 years) in the household. This share differs only slightly between respondents from Schleswig-Holstein and Lower Saxony (19% vs. 21%).
- **Net household income:** Two thirds of North Sea visitors overall have net household income of EUR 3.000 or more. The income level of North Sea Schleswig-Holstein visitors is somewhat lower than that of North Sea Lower Saxony visitors.
- **Source markets:** 99% of respondents from the German Wadden Sea region are domestic travelers. The main source markets for North Sea visitors in Germany are from the states of North Rhine-Westphalia (39%), Hesse and Lower Saxony (11% each). 9% come from Baden-Württemberg.



United Nations
Educational, Scientific and
Cultural Organization



The Wadden Sea
World Heritage Site
since 2009



Nationalpark
Wattenmeer



Interreg
North Sea Region
PROWAD LINK
European Regional Development Fund



EUROPEAN UNION

PROWAD LINK

Method description (1)

- **Survey method:** paper-pencil survey in the accommodation
- **Target group:** overnights guests aged 14 years and older to the German Wadden Sea region in private and commercial accommodation (Sanatoria, rehabilitation clinics, youth hostels and campsites, as well as day trippers are excluded).
- **Language:** German
- **Sample points:** more than 530 private and commercial accommodation establishments (sanatoria, rehabilitation clinics, youth hostels and campsites are excluded)
- **Number of respondents:**
Total: 640 respondents, Lower Saxony: 310 respondents, Schleswig-Holstein: 330 respondents
- **Survey period:**
Summer 2020: 1 July – 31 August 2020
Autumn 2020: 1 September to 6 November 2020
Spring 2021: 1 April to 30 June 2021

Due to the Corona pandemic and associated restrictions the originally planned spring survey period 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.



Method description (2)

- The survey in the German Wadden Sea region was designed as a written survey, the results are representative for the regional accommodation structure of the Wadden Sea area in both federal states.
- The survey method is based on the method of the statewide guest survey Schleswig-Holstein, which has been successfully implemented in Schleswig-Holstein and Lower Saxony for several years. The method was also successfully used for the guest surveys in 2013 and 2017 as part of the Interreg North Sea Region project PROWAD on the Schleswig-Holstein and Lower Saxony North Sea coast.
- The sample was conducted with a regionally, seasonally and sectorally layered two-stage (systematic) random selection. The sample points are the accommodation establishments.
- The sampling is based on the accessible accommodation establishments from all available listings. Sanatoria, rehabilitation clinics, youth hostels and campsites are excluded. Afterwards, a systematic random selection is formed according to regional and sectoral quotas.
A target number of questionnaires is assigned to the establishments that are included in the sample, which are distributed based on the actual arrivals.
- The survey documents are sent out separately for each survey period, each time at the beginning of a new survey period.
- They are passed on to the guests by the host by means of random selection. It is a prerequisite that the guest is 14 years or older and that only one person per travel group/family receives a questionnaire.
- The filled in questionnaires are returned directly by the guest with a provided return envelope to the NIT as the organising institute. Neither the accommodation provider nor the guest is charged any costs.
- The data were reweighted by absolute arrivals in the survey period according to regional, sectoral and seasonal ratios for which the data are representative.

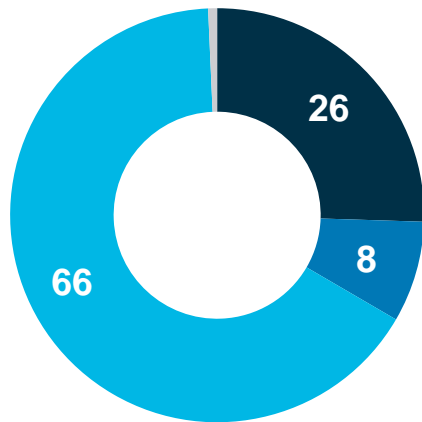


Travel experience with the Wadden Sea region

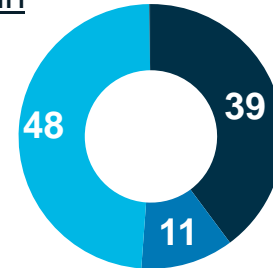
in %

Comparison to 2017:
German Wadden Sea region
Regular customers 60%

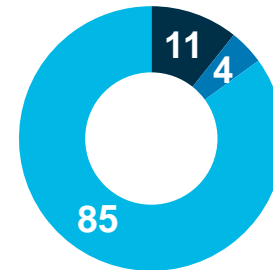
German Wadden Sea region



Schleswig-Holstein



Lower Saxony



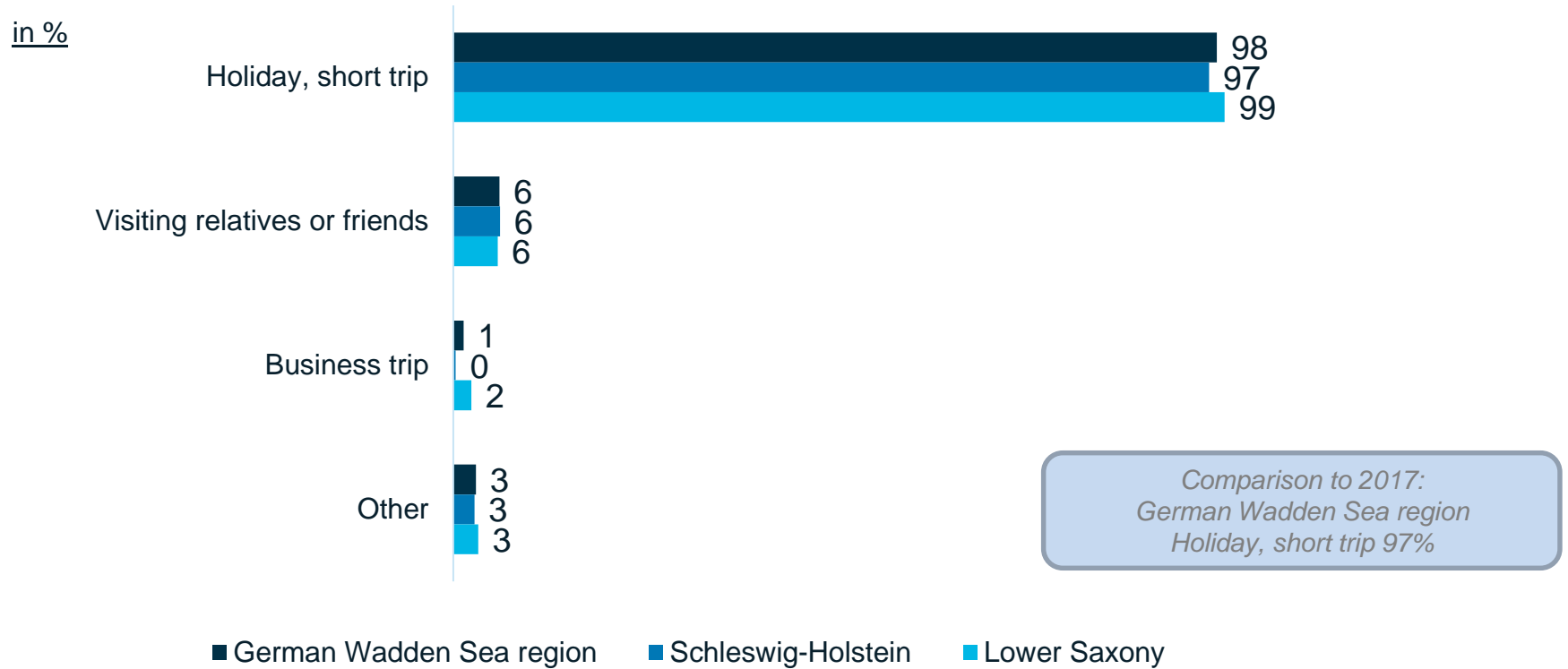
- First-time visitors
- Second time visitors
- Regular visitors
- No answer/don't know

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

Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) 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

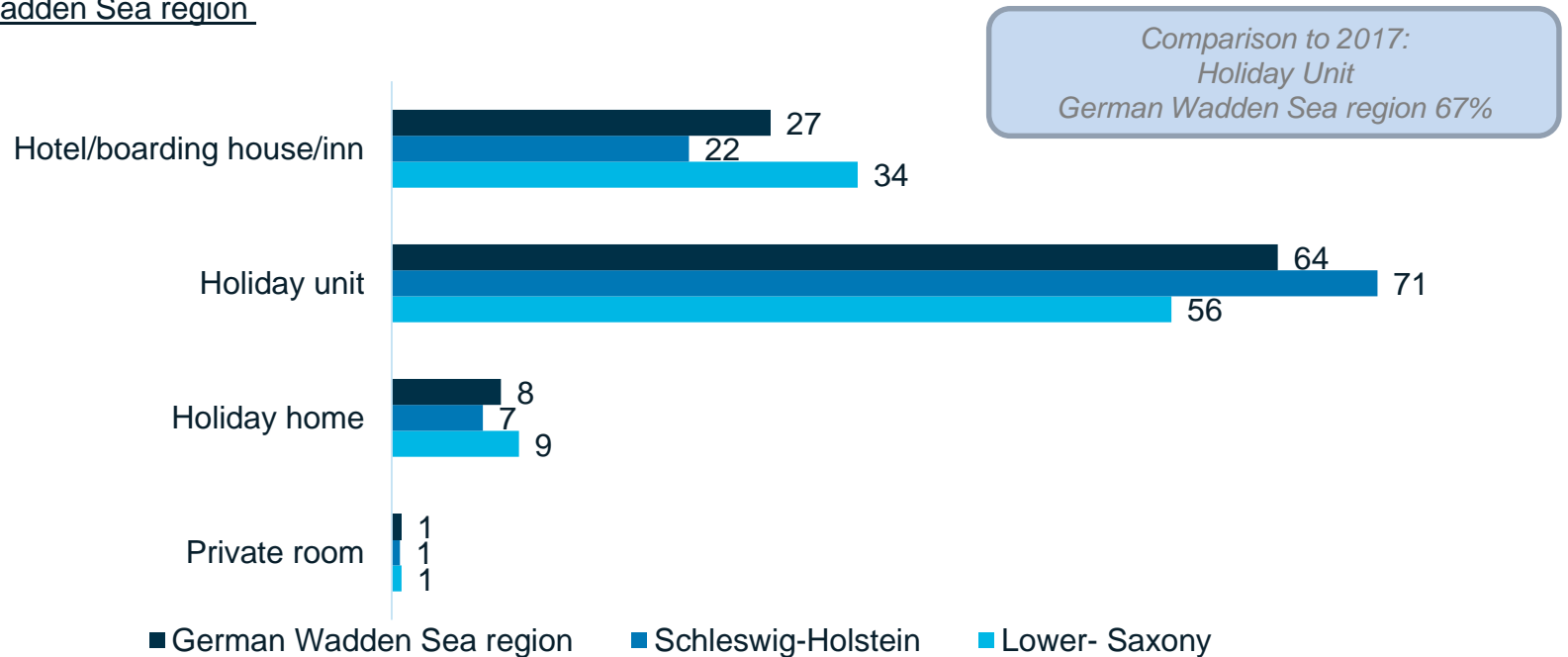


Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021
 Question: What is the reason of your travel? (multiple answers)

Accommodation

in %

German Wadden Sea region



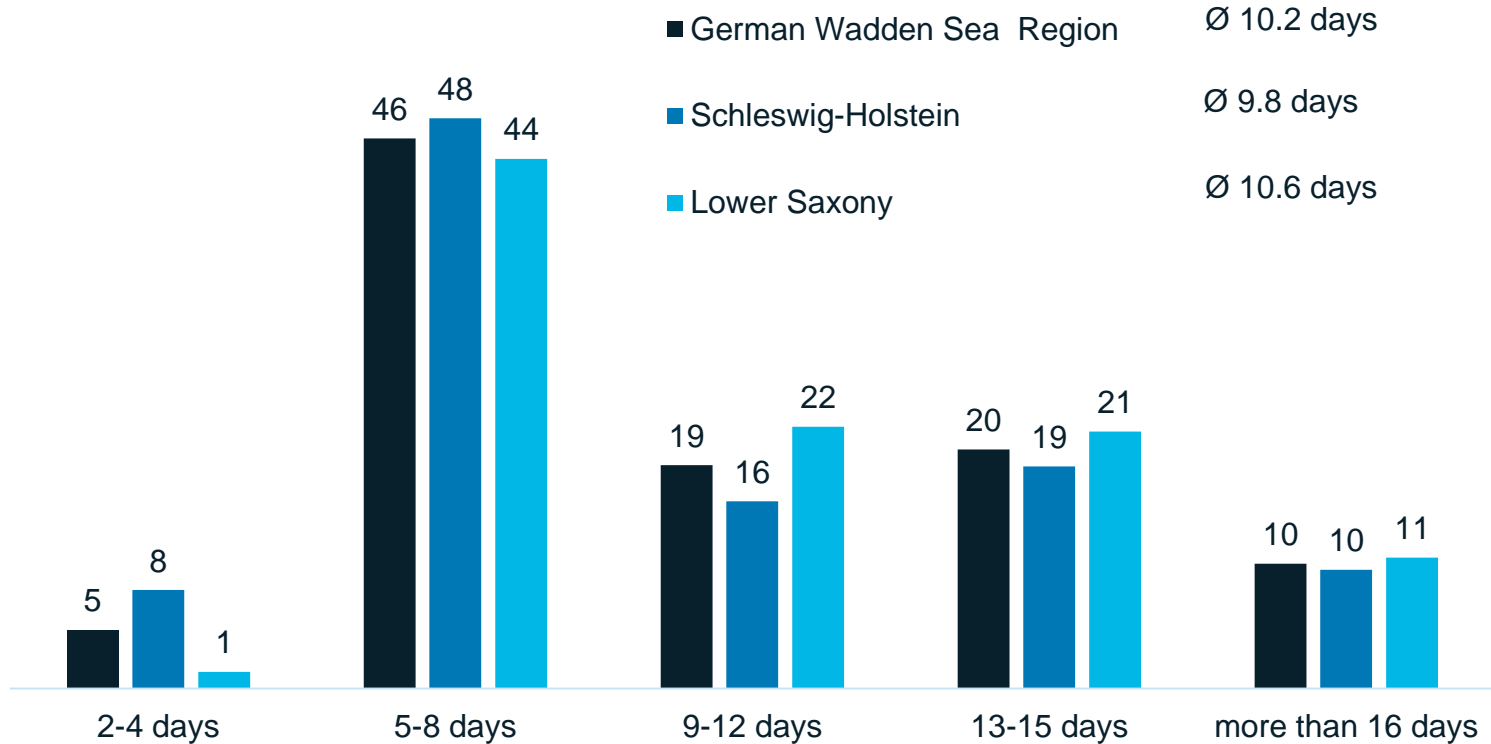
Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021
Question: What type of accommodation do you currently occupy?



Length of stay

in %

Average length of stay



- German Wadden Sea Region Ø 10.2 days
- Schleswig-Holstein Ø 9.8 days
- Lower Saxony Ø 10.6 days

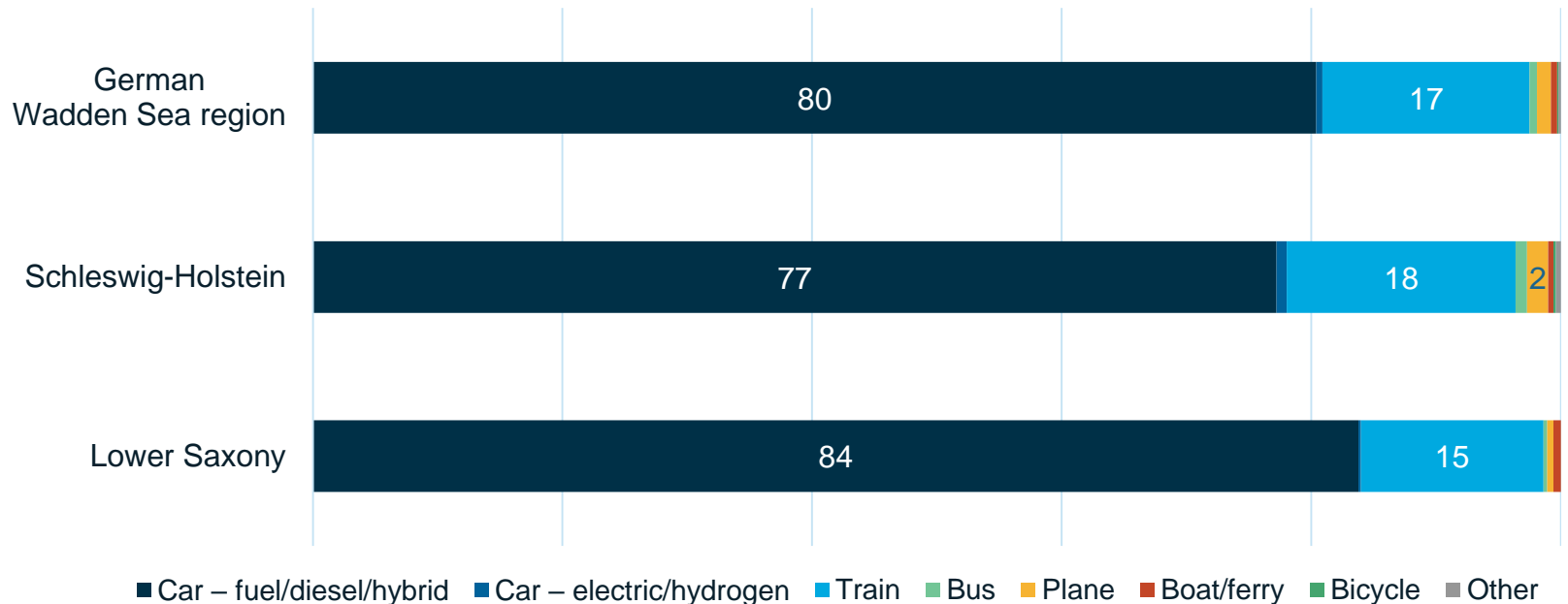
2017
9,8
10,2
9,6

Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) 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 %

Comparison to 2017:
Proportion of car as main means of transportation
German Wadden Sea Region 76%

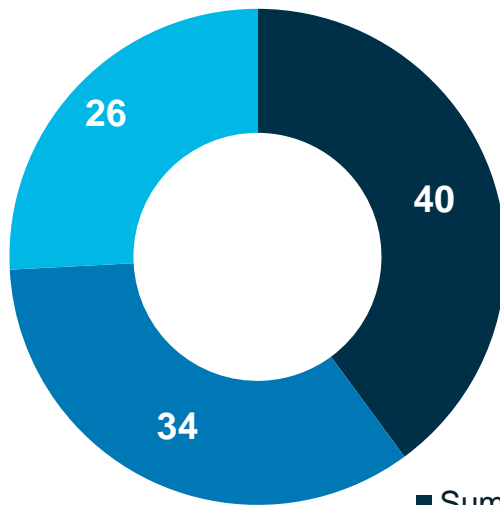


Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021
Question: What main mode of transport did you use to arrive at your current travel destination? (longest distance, single answer)

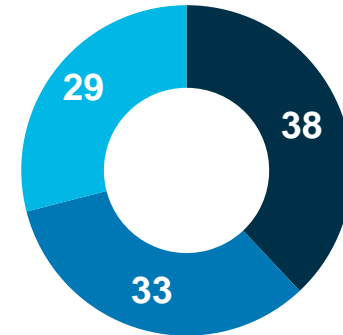
Date of travel

in %

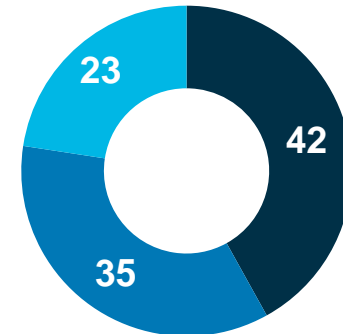
German Wadden Sea region



Schleswig-Holstein



Lower Saxony



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

Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021

Sources of information (TOP 10)

in %

Sources of information (TOP 10)	German Wadden Sea region	Schleswig-Holstein	Lower Saxony
Family, friends	37	33	41
Specific websites of the region/place	35	40	30
Accommodation website	35	34	36
Internet search engines	19	26	12
Online booking sites, e.g. for holiday units or hotel rooms	16	23	9
Host directory	11	10	13
Travel literature, travel guides	10	12	7
Tourist information in the region/place	9	11	8
TV	8	9	6
Online rating portal	6	6	5

Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021
 Question: Where did you find information about your current travel destination? (multiple answers)



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

Sources of information (TOP 11-20)

in %

Sources of information (TOP 11-20)	German Wadden Sea Region	Schleswig-Holstein	Lower Saxony
Newspaper, news magazine	5	5	6
Social media	5	4	7
Journalistic reports on the internet	4	6	2
Brochure of the rental accommodation	4	2	5
Travel magazine	2	1	2
Travel agency, tour operator	1	1	1
Someone else assembled the information	1	1	1
Travel exhibition	0	0	0
I have not informed myself beforehand	5	3	8
Others	9	6	12

Basis: Respondents German Wadden Sea Region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021
 Question: Where did you find information about your current travel destination? (multiple answers)



United Nations
Educational, Scientific and
Cultural Organization



The Wadden Sea
World Heritage Site
since 2009



Nationalpark
Wattenmeer



Interreg
North Sea Region
PROWAD LINK
European Regional Development Fund

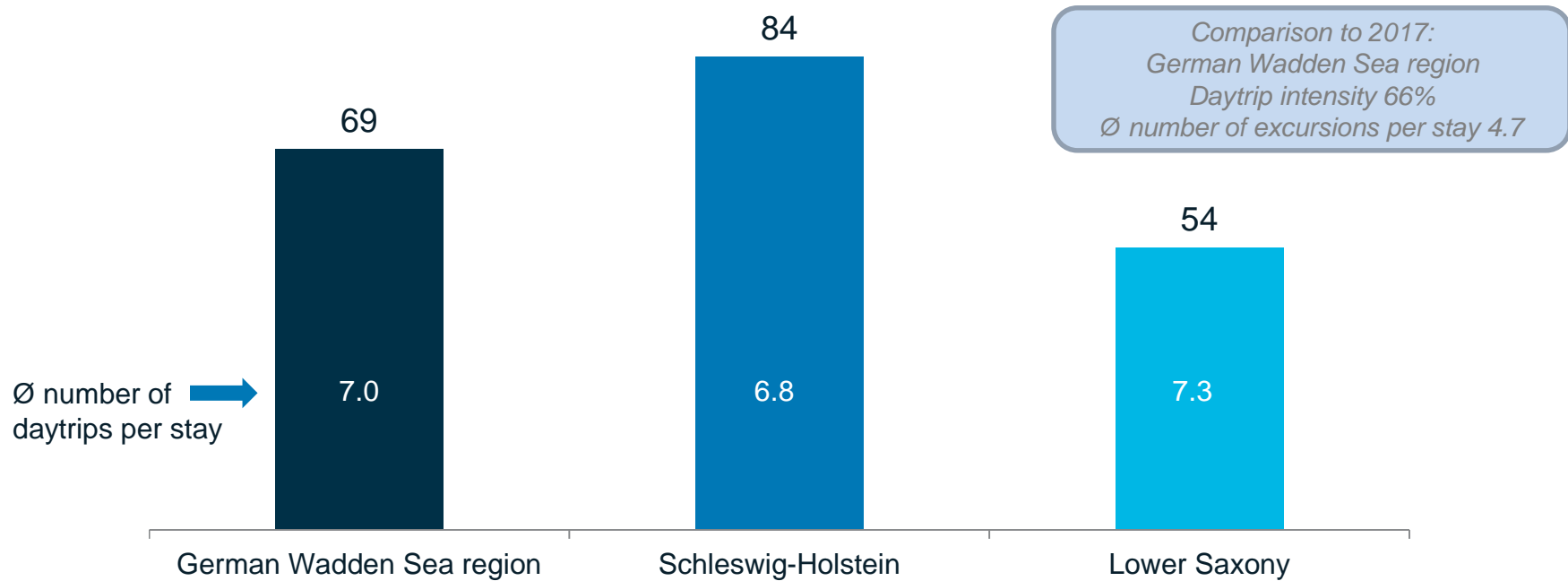


EUROPEAN UNION

PROWAD LINK

Daytrips while staying overnight

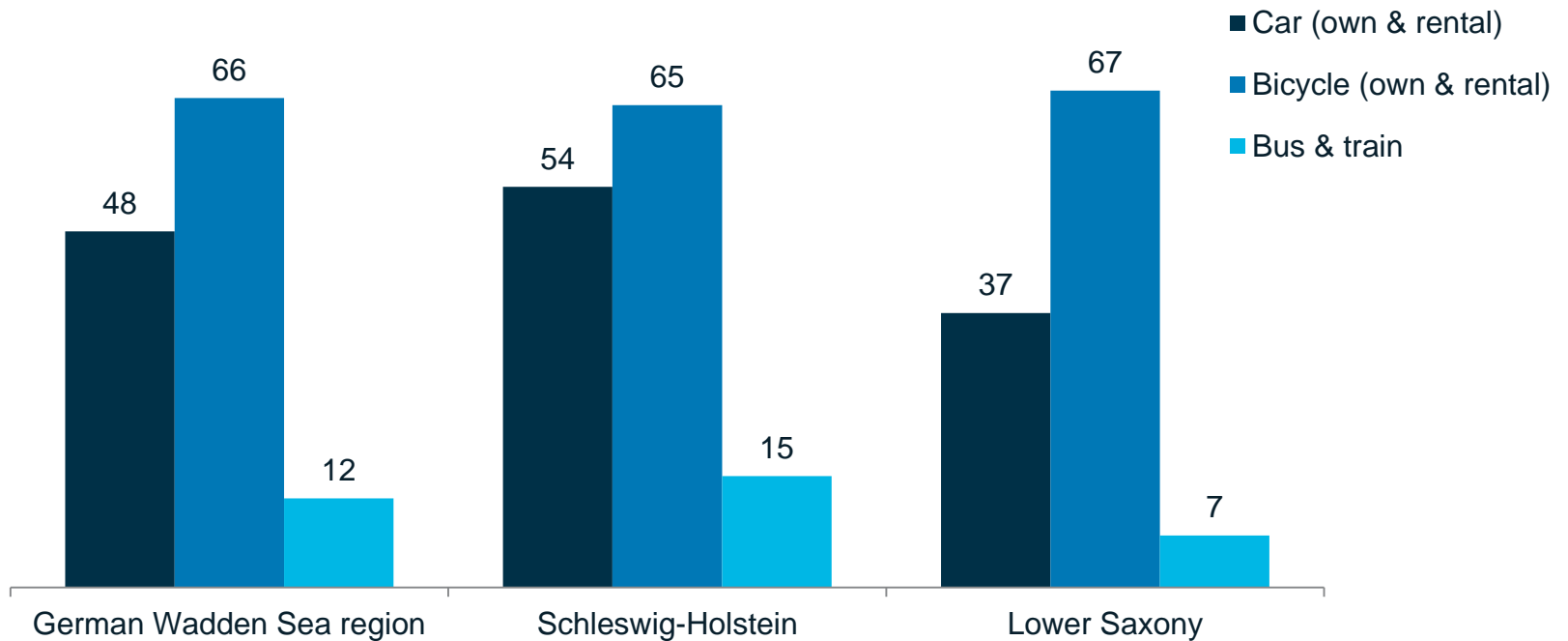
Daytrip intensity
(percentage of respondents who have made at least one daytrip)



Basis: Respondents German Wadden Sea region (n=206), Schleswig-Holstein (n=144), Lower Saxony (n=62) in summer 2020, autumn 2020 and spring 2021
Question: Did you do any daytrips from your current location?
Question: If yes, how many daytrips did you do?

Trips during overnight stays: Means of transport

in %



Basis: Respondents who did at least one trip during their stay. German Wadden Sea Region (n=444), Schleswig-Holstein (n=277), Lower Saxony (n=167) 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 (TOP 10)	German Wadden Sea region	Schleswig-Holstein	Lower Saxony
Own car	46	52	37
Rented/shared car	2	2	0
Own bicycle	51	49	55
Rented/shared bicycle	17	18	15
Bus or train	12	15	7

Basis: Respondents who did at least one trip during their stay. German Wadden Sea Region (n=444), Schleswig-Holstein (n=277), Lower Saxony (n=167) 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?



United Nations
Educational, Scientific and
Cultural Organization



The Wadden Sea
World Heritage Site
since 2009



Nationalpark
Wattenmeer



Interreg
North Sea Region
PROWAD LINK
European Regional Development Fund

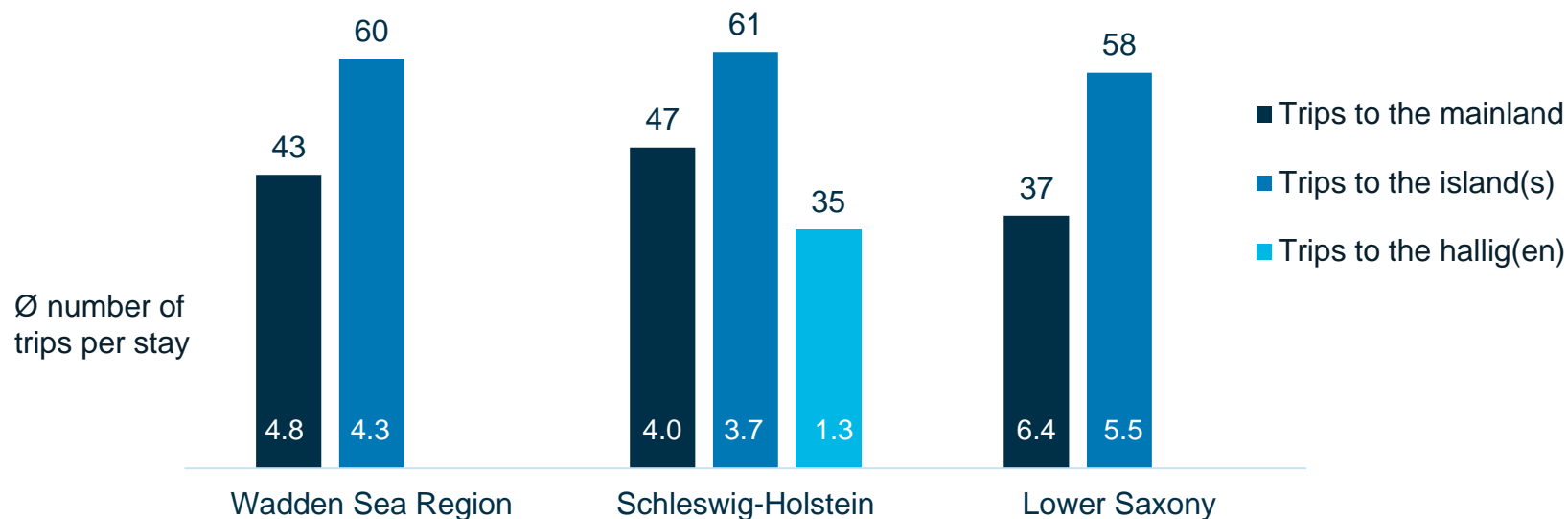


EUROPEAN UNION

PROWAD LINK

Trips during overnight stays: destinations

Intensity by destination
(percentage of respondents who have made at least one trip to main land respectively island)



Basis: Respondents German Wadden Sea region (n=444), Schleswig-Holstein (n=277), Lower Saxony (n=167) 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.)



United Nations
Educational, Scientific and
Cultural Organization



The Wadden Sea
World Heritage Site
since 2009



Nationalpark
Wattenmeer



Interreg
North Sea Region
PROWAD LINK
European Regional Development Fund



EUROPEAN UNION

PROWAD LINK

Travel expenses per person per day

in EUR

<i>Average Value per person per day</i>	Accommodation	Other expenditure (Food venues, shopping, entrance fees, day trips etc.)	Total expenses for the trip (excluding arrival/departure)
German Wadden Sea region	46,-	31,-	76,-
Schleswig-Holstein	43,-	30,-	73,-
Lower Saxony	49,-	31,-	80,-

Basis: Respondents German Wadden Sea region (n=527), Schleswig-Holstein (n=250), Lower Saxony (n=276) 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.)



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

Travel expenses

Comparison to 2017:
 German Wadden Sea region
 Accommodation: 42,- €; other expenses: 30,- €;
 total travel expenses: 1529,- €

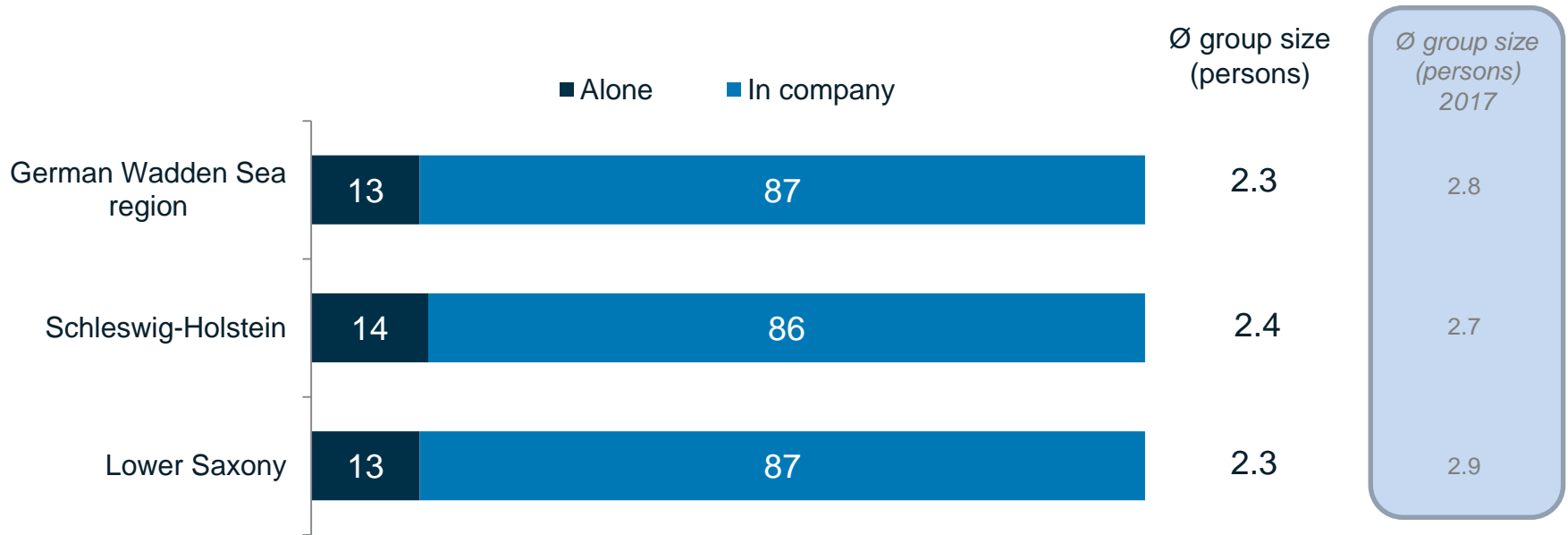
Travel expenses in EUR	Travel expenses per person and day (Ø)			Total travel expenses for all days and all persons (without costs for arrival & departure)
	Accomodation	Other expenses	total	
German Wadden Sea region	46,-	31,-	76,-	1603,-
Schleswig-Holstein	43,-	30,-	73,-	1510,-
Lower Saxony	49,-	31,-	80,-	1688,-

Basis: Respondents German Wadden Sea region who did answer the number of persons they travel with, the number of days they stay and their expenditure (n=612)
 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 %



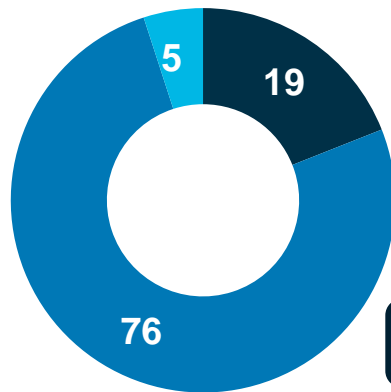
Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021
 Question: How many people are included in the above estimate? How many people belong to your party, including you?



Travel in company: travelling with children

in %

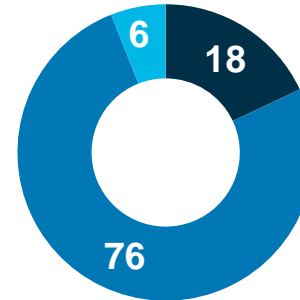
German Wadden Sea region



Travelling with dog(s): 4%

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

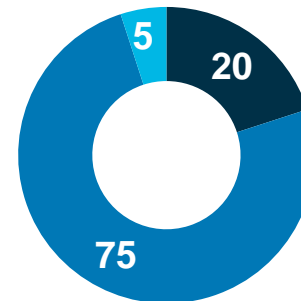
Schleswig-Holstein



Comparison to 2017:
Travelling with children (0-17 years)
German Wadden Sea region 25%

Travelling with dog(s): 4%

Lower Saxony

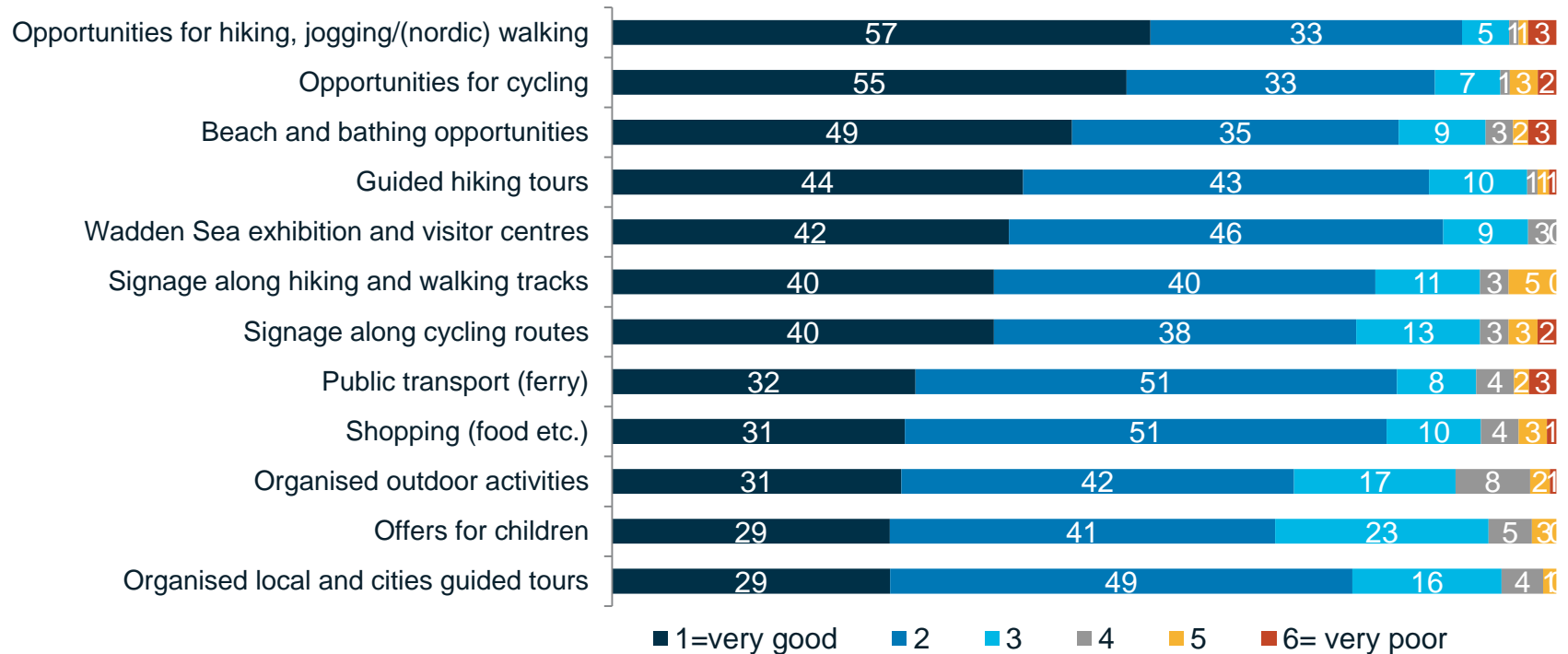


Travelling with dog(s): 4%

Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) 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 %

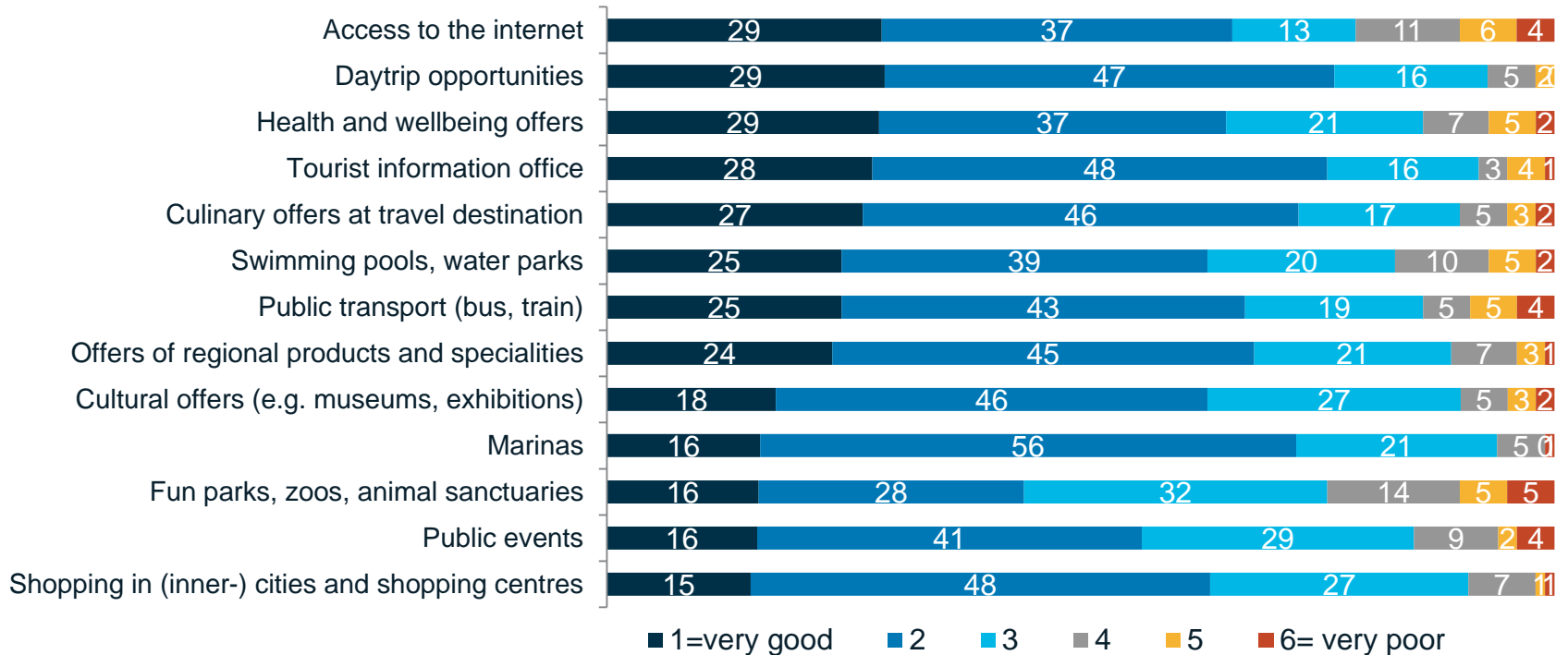


Basis: Respondents with indication to respective offer German Wadden Sea region in summer 2020, autumn 2020 and spring 2021
 Question: How would you rate the following aspects at your travel destination? Please rate only those that you used yourself using the scale from 1 (very good) to 6 (very poor).



Ratings (II): tourist offers

in %



Basis: Respondents with indication to respective offer German 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).

Usage intensity of tourist offers: over 60%

Tourist offers used by more than 60% of the visitors in %	German Wadden Sea Region	Schleswig-Holstein	Lower Saxony
Shopping (food etc.)	95	94	96
Culinary offers at travel destination	93	91	94
Offers of regional products and specialties	87	86	90
Access to the internet	84	83	86
Opportunities for hiking, jogging or (Nordic) walking	84	79	89
Opportunities for cycling	81	83	79
Beach and bathing opportunities	79	71	88
Signage along cycling routes	76	81	72
Signage along hiking and walking tracks	76	72	81
Public transport (ferry)	68	64	73
Shopping in (inner-) cities and shopping centres	67	61	73

Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021



United Nations
Educational, Scientific and
Cultural Organization



The Wadden Sea
World Heritage Site
since 2009



Nationalpark
Wattenmeer



Interreg
North Sea Region
PROWAD LINK
European Regional Development Fund



EUROPEAN UNION

PROWAD LINK

Usage intensity of tourist offers: below 60%

Tourist offers used by less than 60% of the visitors in %	German Wadden Sea region	Schleswig-Holstein	Lower Saxony
Daytrip opportunities	54	68	39
Wadden Sea exhibition and visitor centres	53	47	60
Tourist information office	52	50	54
Health and wellbeing offers	39	26	53
Cultural offers (e.g. museums, exhibitions, events, concerts, churches)	38	37	39
Swimming pools, water parks	35	23	48
Public transport (bus, train)	34	38	30
Guided hiking tours (e.g., walking on the tidal flats, nature walks)	30	33	27
Public events	24	20	28
Offers for children	24	22	25
Organised local and cities guided tours	21	21	21
Organised outdoor activities (e.g., rafting, beach sailing, (kite) surfing)	16	14	18
Fun parks, zoos, animal sanctuaries	13	11	14
Marinas	13	10	16
No answer	1	1	1

Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021



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

Sources of information about the Wadden Sea on site

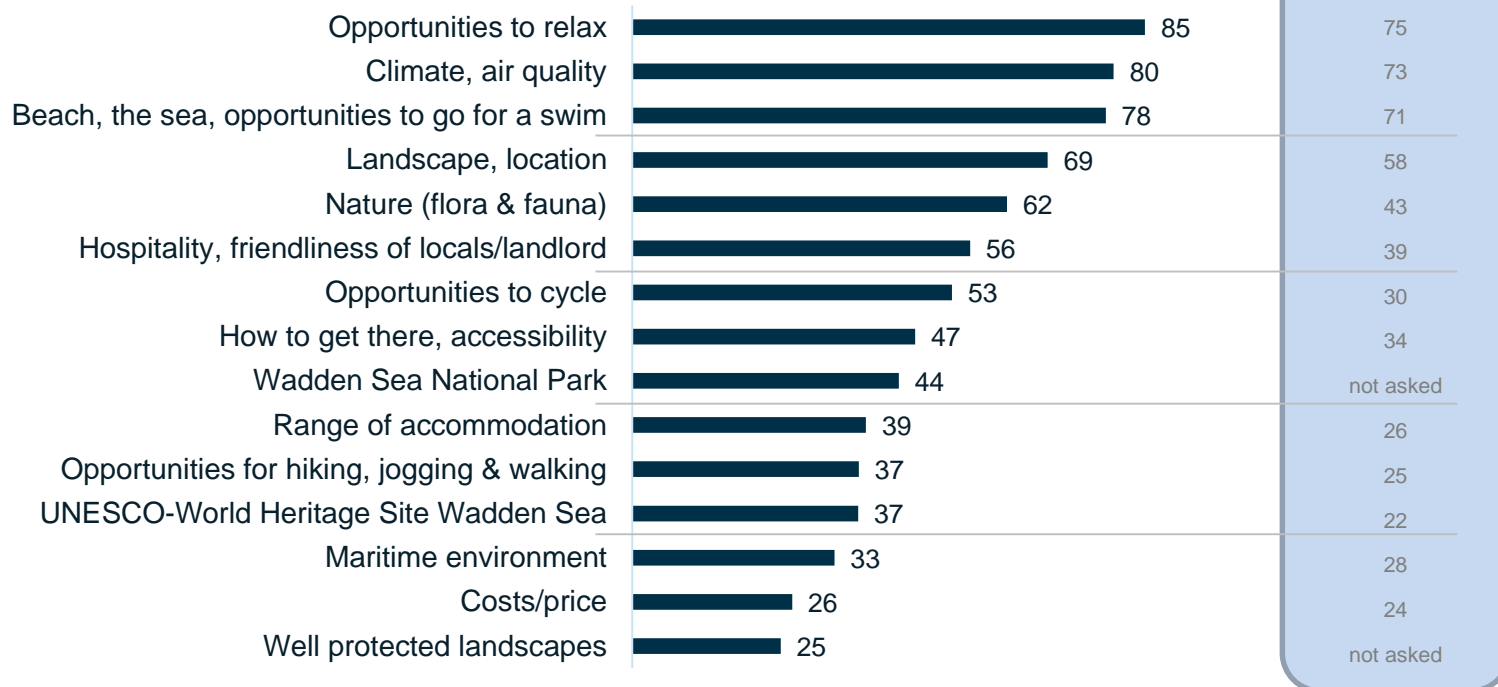
in %

		Schleswig-Holstein	Lower Saxony	German Wadden Sea 2017
Information boards and displays	65	65	65	60
Leaflet(s)/brochure(s)	36	36	37	37
Wadden Sea exhibition or visitor centre	28	28	28	24
Guided tidal flat tour	27	26	29	32
Internet	26	23	28	19
Educations trail	21	15	27	20
Landlord/hotel employees	18	15	20	13
Tourist information/Office for tourism management	15	14	15	26
Offer(s) on nature experience	9	8	11	11
Employees of the nature protection agencies	7	11	3	3
Smartphone-App	7	5	8	3
Nature guide	5	6	4	4
Other	5	6	3	-

Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) 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 German Wadden Sea region (TOP 15)

in %



Basis: Respondents German Wadden Sea region (n=640) 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 %)



German Wadden Sea 2017
Top-2-Boxes =
(very) important

93
90
71
79
73
69
39
44
47
31
7

Basis: Respondents German Wadden Sea region (n=640) 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).

Importance of environmental aspects in the destination

How important is it for you ... (figures for important/very important in %)	German Wadden Sea region	Schleswig-Holstein	Lower Saxony
... experience intact nature during your stay?	94	94	94
... that nature is protected at your destination ?	94	92	95
... to be away from the hustle and bustle of tourists crowds ?	80	82	79
... to learn something about the region/place you are staying ?	78	81	75
to learn something about nature at your travel destination?	75	76	73
... to experience accommodations/restaurants that use mainly regional products ?	67	69	64
... that you can participate in nature tours during your stay?	43	43	44
... to stay at accommodation with an eco-label ?	35	33	36
... that you can access public transport during your stay ?	34	41	27
.that you can reach your destination by public transport instead of by car ?	32	36	28
... that you can hire an electrical car at your destination ?	3	3	3

Basis: Respondents German Wadden Sea Region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) 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).



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

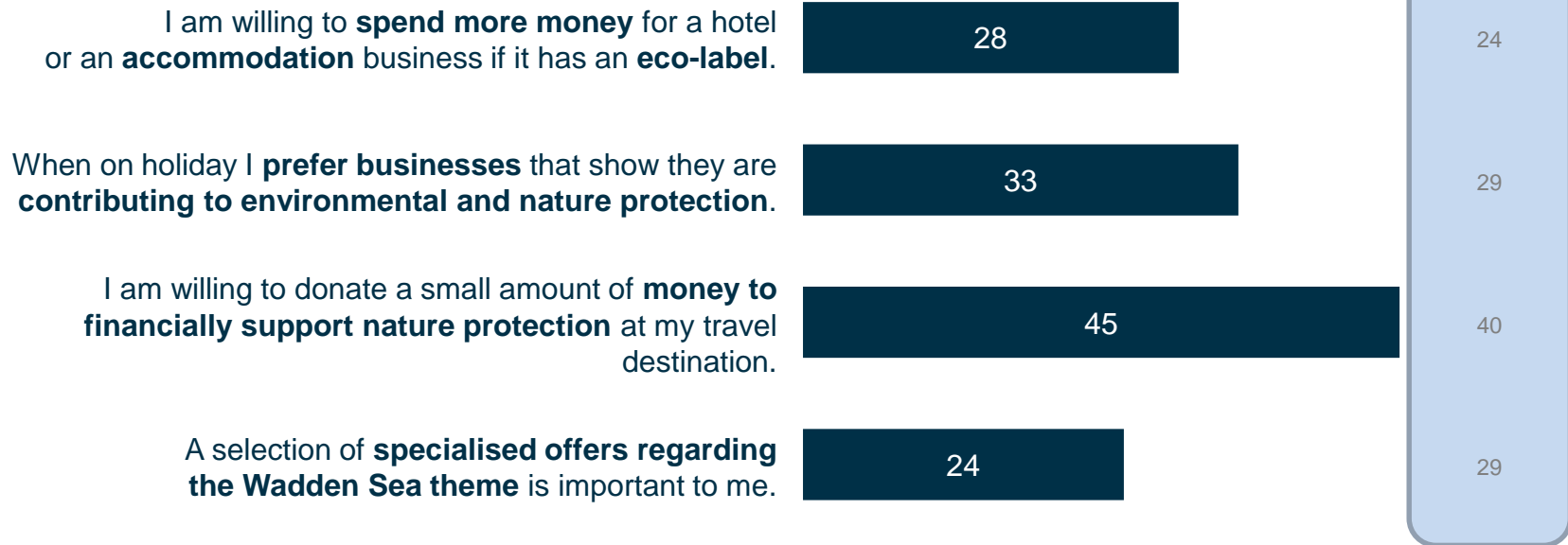


EUROPEAN UNION

PROWAD LINK

Willingness to pay for nature conservation measures

in %



Basis: Respondents German Wadden Sea region (n=640) in summer 2020, autumn 2020 and spring 2021
Question: With which of the following statements do you agree? (Multiple answers.)

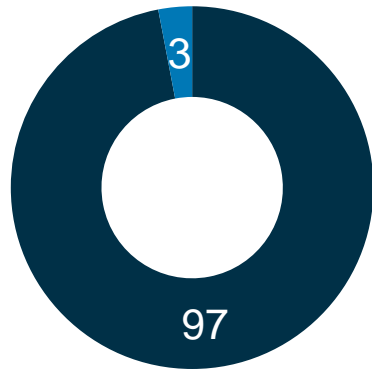
Awareness of World Heritage designation

Comparison to 2017:
Awareness of World Heritage designation
German Wadden Sea region 96%

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

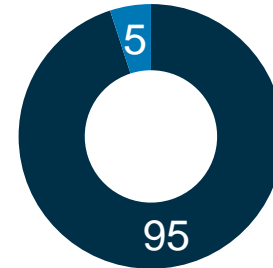
in %

German Wadden Sea region

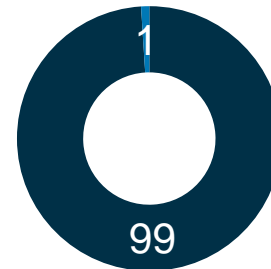


■ Yes ■ No

Schleswig-Holstein



Lower Saxony



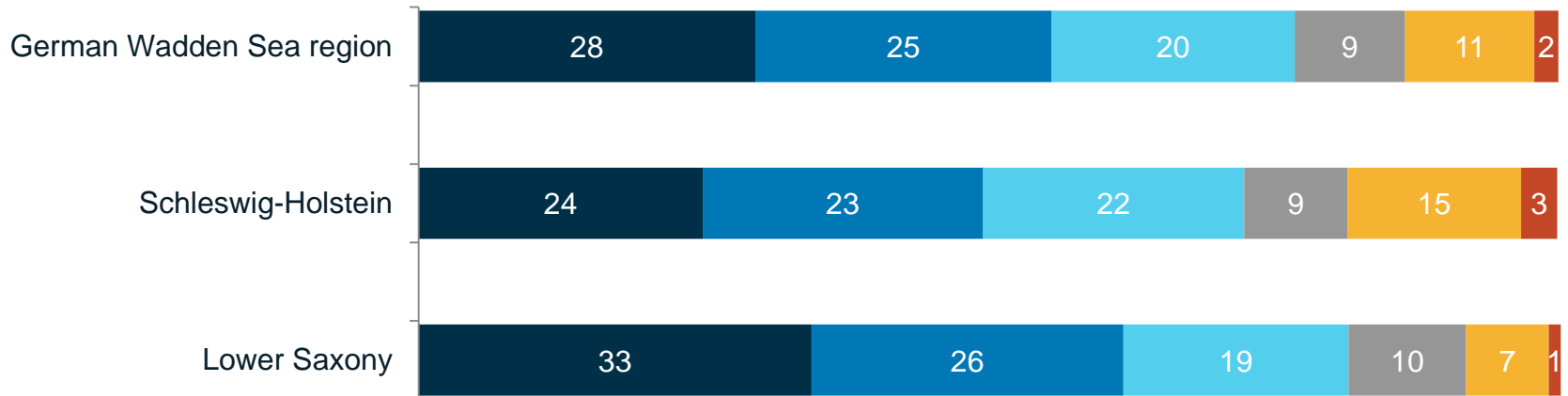
Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021
Question: Did you know that the Wadden Sea is a World Heritage site?

Importance of the National Park status for the travel decision

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

Comparison to 2017: Proportion of guests for whom the protection of the Wadden Sea as a national park is a very important reason for their travel decision: German Wadden Sea region 22%

in %



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

Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021 percentage missing to 100% = no answer.

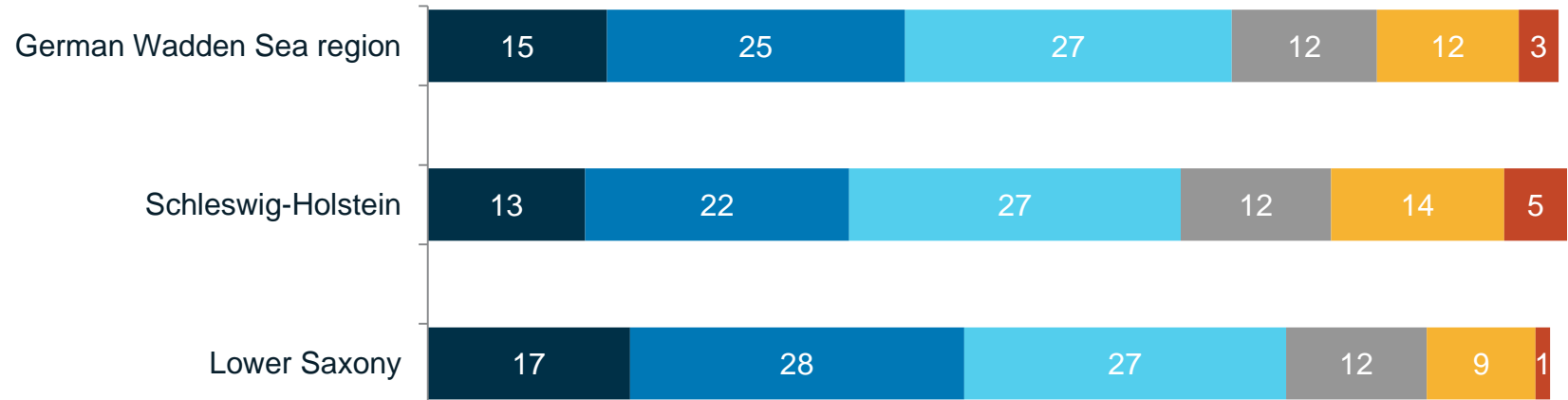
Question: How important were the following aspects when planning this journey? Four-level scale (very important, important, less important, not important).

Importance of the UNESCO World Heritage status for the travel decision

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

in %

*Comparison to 2017:
Proportion of guests for whom the protection of the UNESCO World Heritage status of the Wadden Sea was a very important reason for their travel decision: German Wadden Sea region 13%*



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

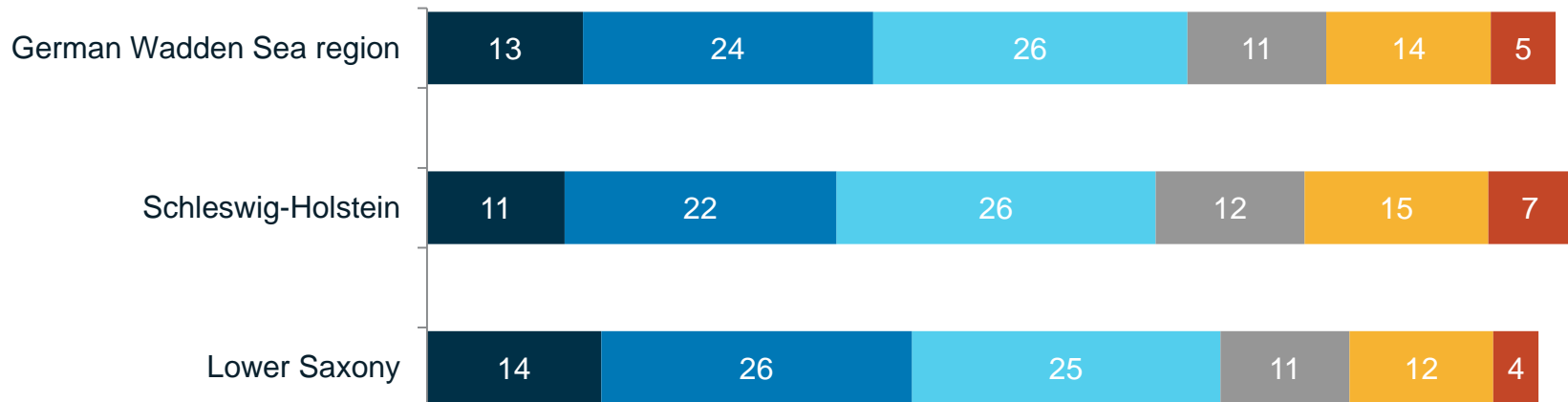
Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=210) in summer 2020, autumn 2020 and spring 2021 percentage missing to 100% = no answer.

Question: How important were the following aspects when planning this journey? Four-level scale (very important, important, less important, not important).

Importance of the UNESCO Biosphere Reserve for the travel decision

When planning this journey, the status as a UNESCO biosphere reserve was ...

in %

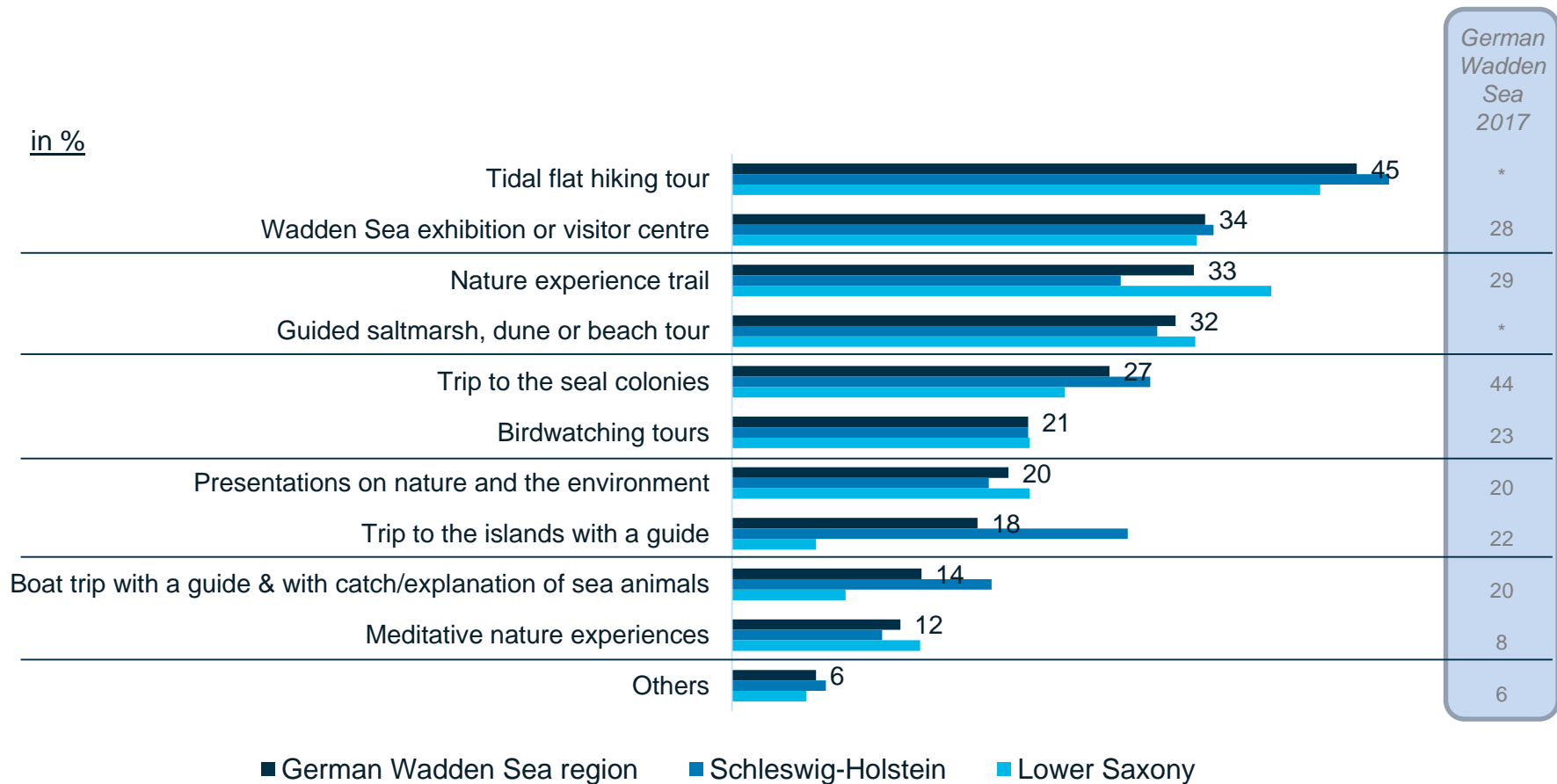


■ Very important
 ■ Important
 ■ Less important
 ■ Not important
 ■ Can't say
 ■ Didn't know about these aspects

Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) 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



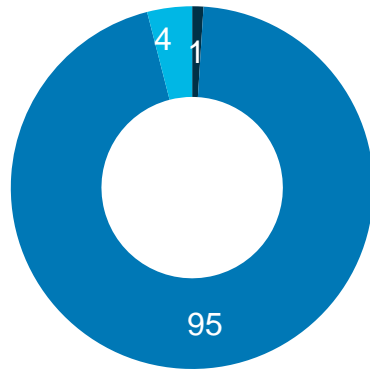
Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021
 Question: Which of the following nature experience offers are of interest to you during your current stay? (Multiple answers); * Answering option differs from 2017, therefore numbers are not comparable

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?

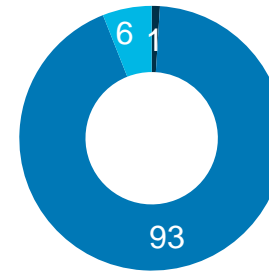
in %

German Wadden Sea region

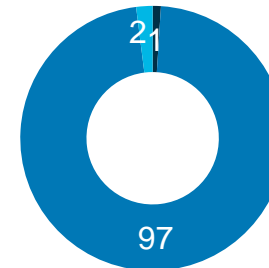


■ Yes ■ No ■ No answer

Schleswig-Holstein



Lower Saxony



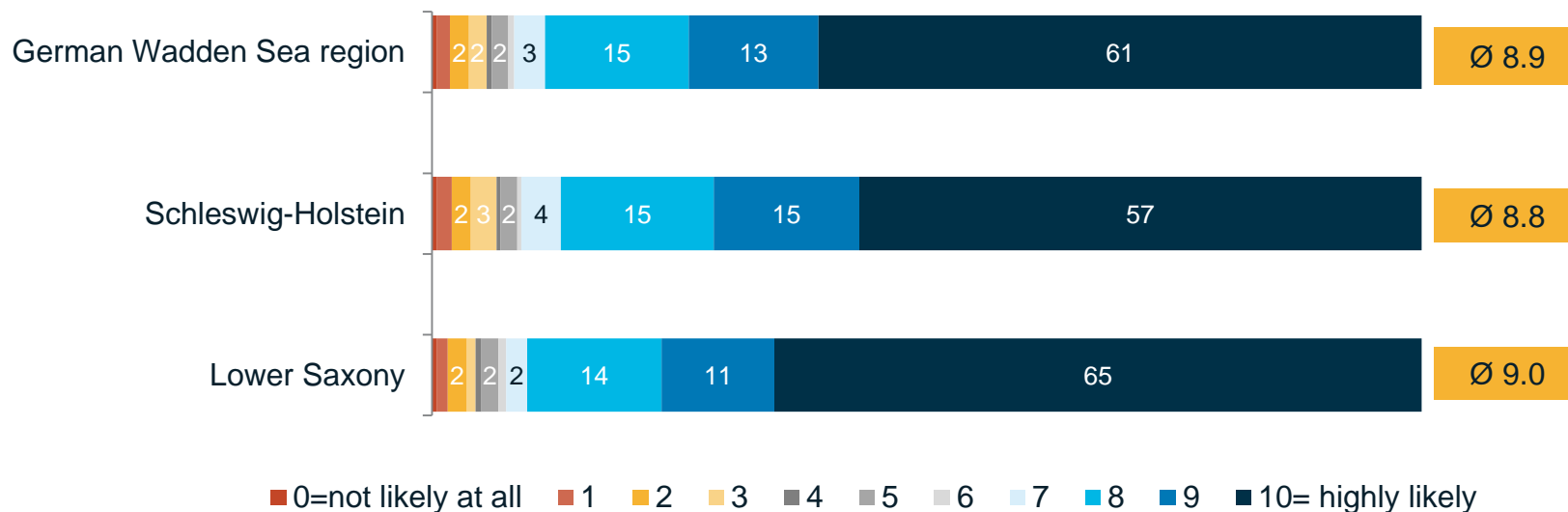
*Comparison to 2017:
Proportion of guests that do not feel restricted
due to protected status of the Wadden Sea
German Wadden Sea region 89%*

Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) 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?



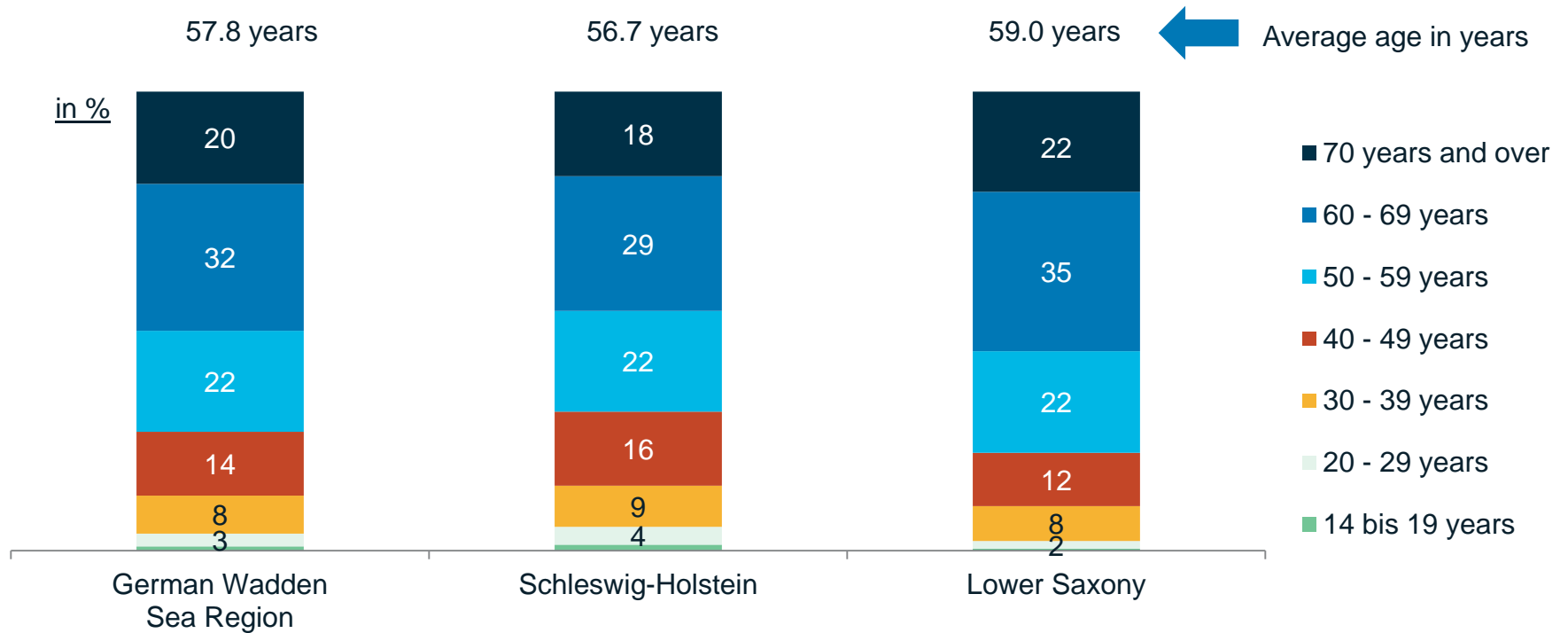
Willingness to recommend the region as a holiday destination

in %



Basis: Respondents with indication German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) 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)

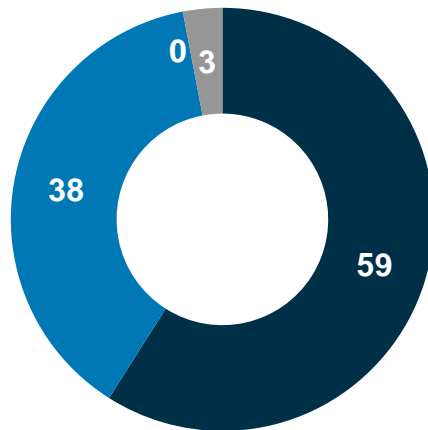


Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021 percentage missing to 100% = no answer.

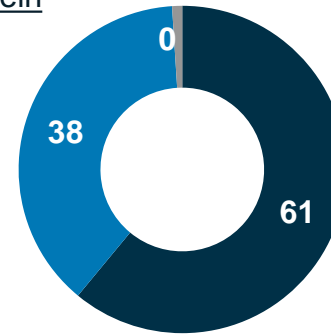
Gender of respondent(s)

in %

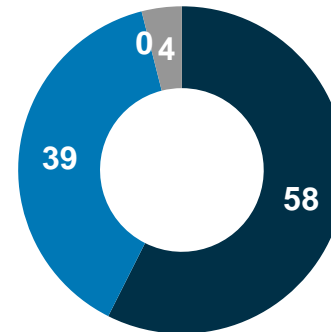
German Wadden Sea region



Schleswig-Holstein



Lower Saxony

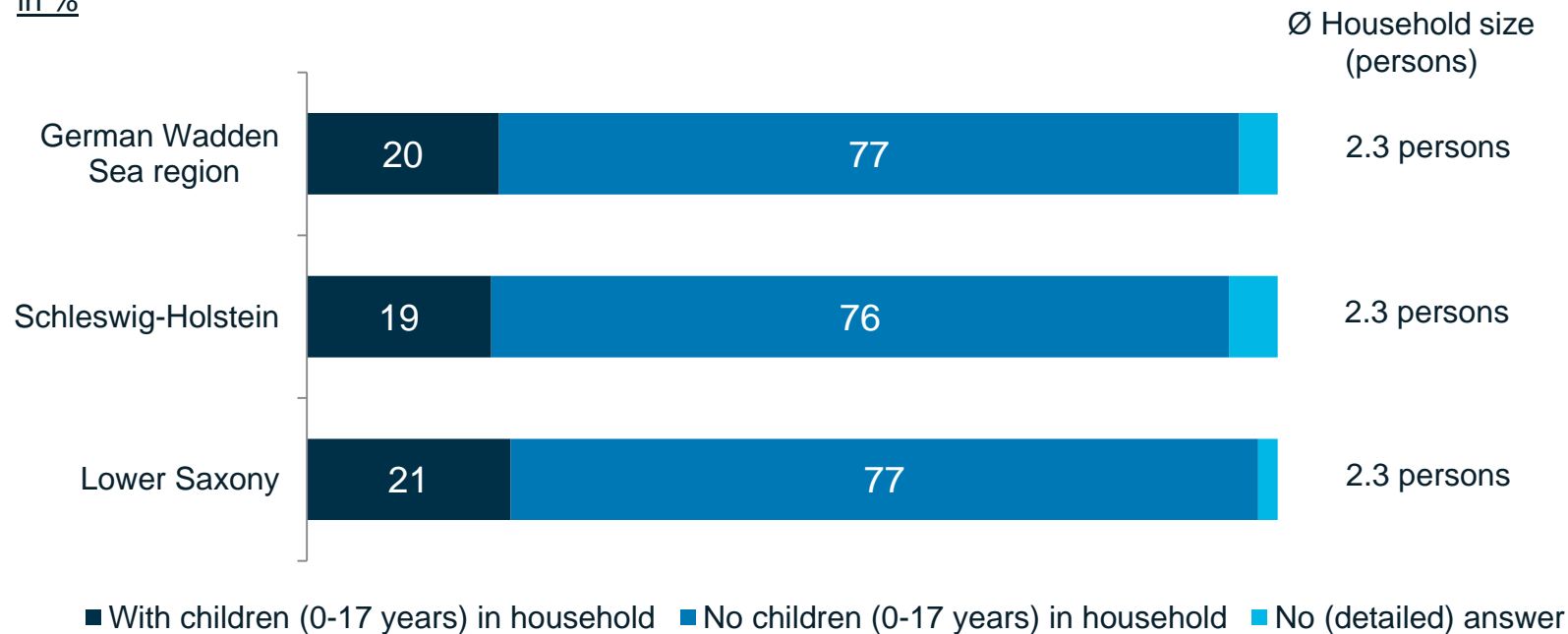


■ Female ■ Male ■ Divers ■ No answer

Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021

Household structure of respondent(s)

in %

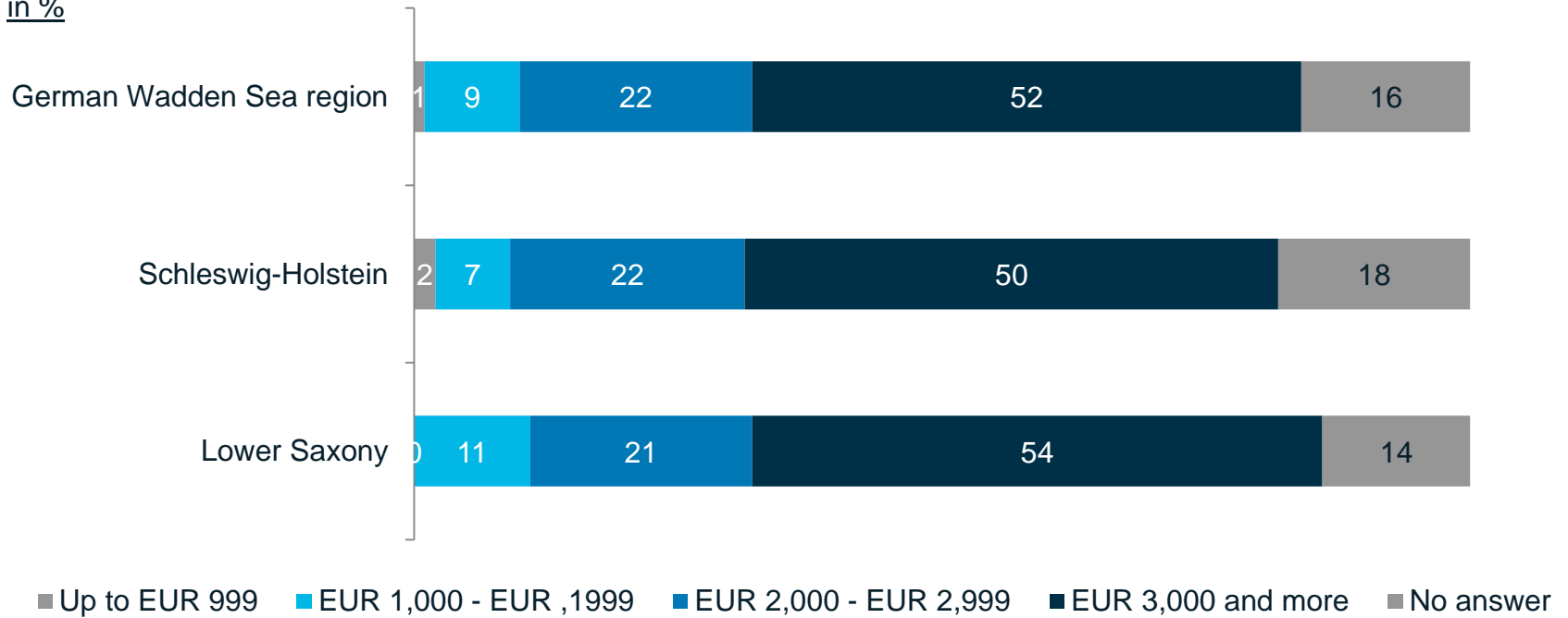


*Comparison to 2017:
Households with children (0-17 years)
German Wadden Sea region: 25%*

Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021

Net household income of respondent(s)

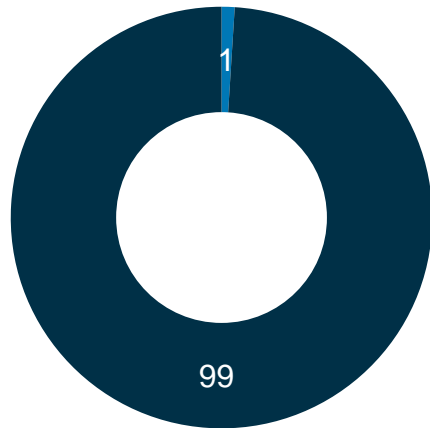
in %



Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021.

Residence of respondents

in %



■ Foreign Countries ■ Domestic

*Comparison to 2017:
NRW: 39%; LS: 16%; HE: 10%; BA: 8%*

Domestic TOP 10 by federal state	Wadden Sea region
North Rhine-Westphalia (NRW)	39
Hesse (HE)	11
Lower Saxony (LS)	11
Baden-Württemberg	9
Bavaria (BA)	8
Hamburg	5
Schleswig-Holstein	4
Rhineland-Palatinate	3
Berlin	3
Bremen	1

Basis: Respondents German Wadden Sea region (n=640), Schleswig-Holstein (n=330), Lower Saxony (n=310) in summer 2020, autumn 2020 and spring 2021

For further information please contact



Institut für Tourismus- und Bäderforschung
in Nordeuropa GmbH (NIT)

Fleethörn 23
D - 24103 Kiel

Tel.: +49 (0)431 - 666 567 - 0
Fax: +49 (0)431 - 666 567 - 10

E-Mail: info@nit-kiel.de
www.nit-kiel.de

Contact:

Henrike Beer (Project Manager)
henrike.beer@nit-kiel.de

Bente Grimm (Head of Tourist Mobility Research)
bente.grimm@nit-kiel.de

Authors: Henrike Beer, Astrid Koch, Bente Grimm, Nadine Yarar



Landesbetrieb für Küstenschutz,
Nationalpark und Meeresschutz Schleswig-Holstein (LKN)
- Nationalparkverwaltung –
Fachbereich Kommunikation und Nationalpark-Partner
Schlossgarten 1
D - 25832 Tönning

Tel.: +49 (0)4861 - 616 - 35
Fax: +49 (0)4861 - 616 - 69

www.lkn.schleswig-holstein.de
www.nationalpark-wattenmeer.de/sh

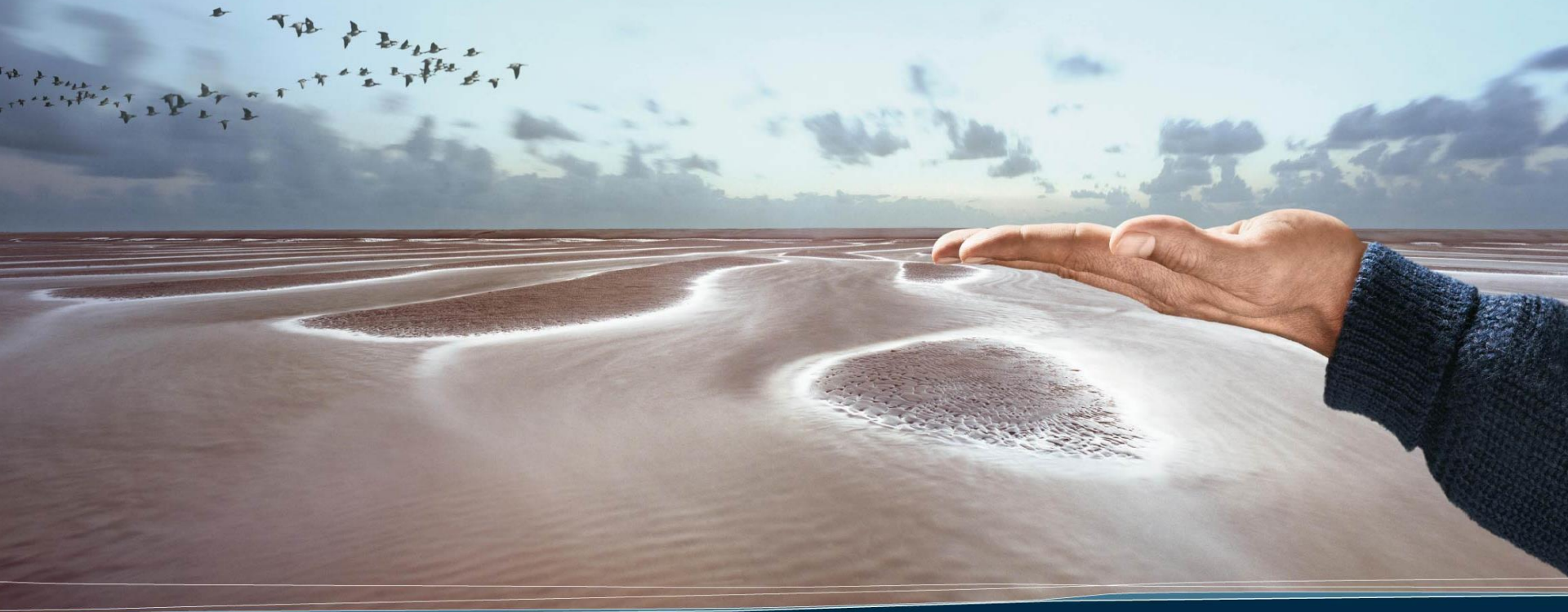
Contact:

Dr. Christiane Gätje
Christiane.Gaetje@lkn.landsh.de



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

Photo: Jeff Wevers/istock



OUR
WADDEN SEA
WORLD HERITAGE

Experience and help preserve a natural wonder
www.waddensea-worldheritage.org

