The Interreg IVB North Sea Region Programme

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SUSTAINABLE TOURISM IN THE WADDEN SEA

Facts and Figures of the Wadden Sea Region

Part I of the Baseline Study for the Strategy for Sustainable Tourism in the Wadden Sea

June 2012
Prepared by

EUROPARC CONSULTING

WADDEN SEA WORLD HERITAGE

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Background

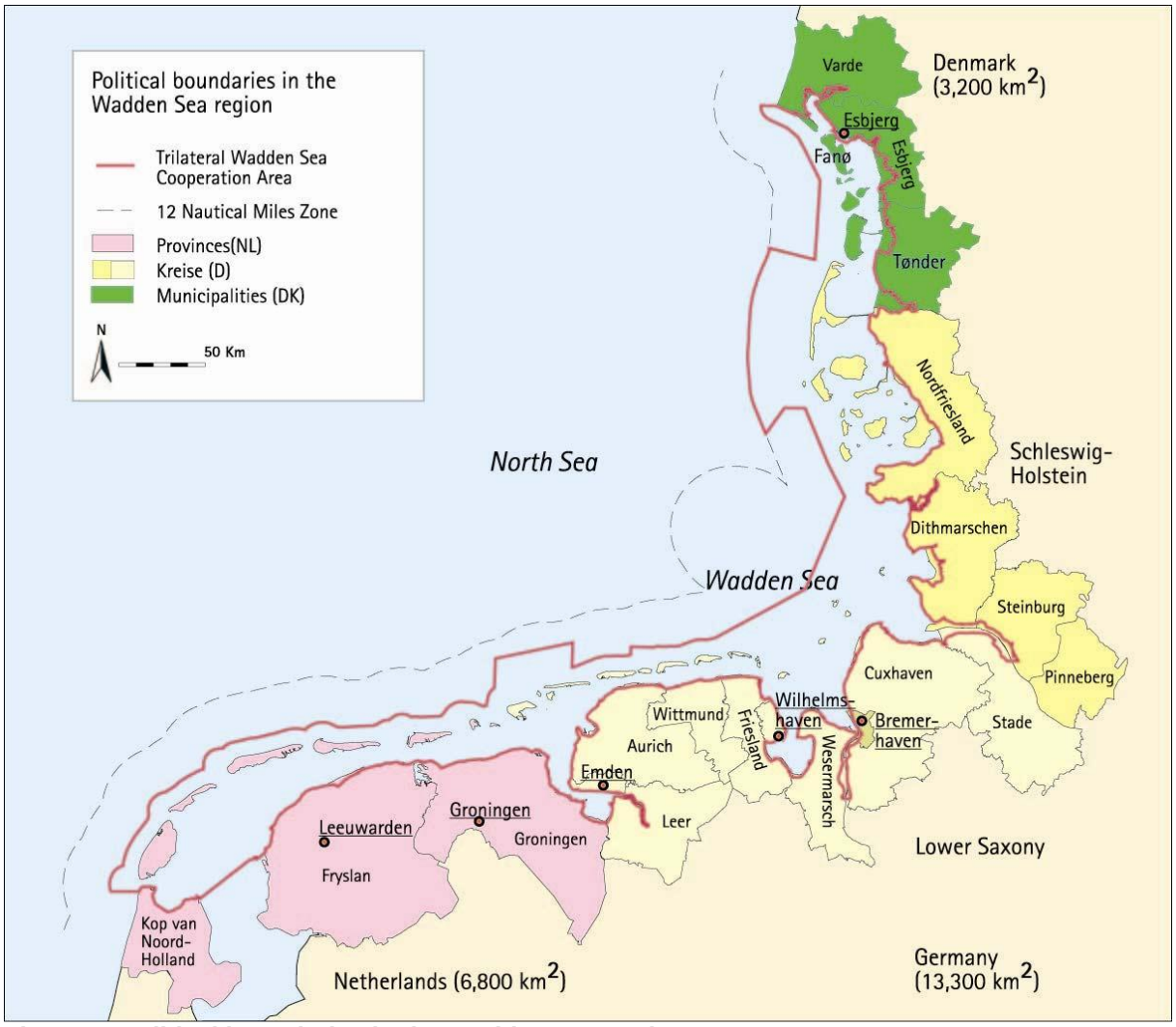

Figure 1: Political boundaries in the Wadden Sea region

The German Wadden Sea area covers tre federal states. There is the Lower Saxony Wadden Sea region with mainland counties Leer, Aurich, Wittmund, Friesland, Wesermarsch and Cuxhaven, three independent cities Emden, Wilhelmshaven and Bremerhaven and the 7 islands Wangerooge, Spiekeroog, Langeoog, Baltrum, Norderney, Juist, Borkum. And there is the Schleswig-Holstein Wadden Sea region with Nordfriesland and Dithmarschen counties and the islands Sylt, Pellworm, Helgoland, Amrum, Föhr and 10 Halligen and the island of Neuwerk in the Hamburg part of the Wadden Sea.

The statistical data available in Germany in general and in this area in particular are based on national statistical codes. These codes state that in Germany accommodations below 9 beds are not included.

The Danish Wadden Sea area is in this report seen as a part of the destination cooperation in tourism called Destination Southwest Jutland. This cooperation covers 5 municipalities: Varde, Esbjerg, Fanø, Tønder and Vejen. Vejen municipality is not directly connected to the Wadden Sea area. Vejen is nevertheless part of the cooperation, and the available statistics that are presented in this report cover all 5 municipalities. It is not possible to retrieve statistics that cover only the 4 municipalities.

Tourism development in the area has since 2008 / 2009 been carried out through Destination South West Jutland that is the formalised tourism cooperation of the area. This cooperation includes the local tourism organisations (LTOs) and the municipalities.

The Danish Wadden Sea area is shown in the map. This map is taken from the newly published action plan of the Danish Wadden Sea National Park (hereafter The National Park Vadehavet, which is the Danish term). The map shows the area that is covered by the national park – not the trilateral Wadden Sea area.

Figure 2: Map taken from the "Draft Management Plan for the Wadden Sea National Park Plan"

The National Park Vadehavet covers 146,600 Ha, it is Denmark's largest national park, and it can in the future play a significant role in the destination as one of the destination's hotspots in close cooperation with Destination Southwest Jutland.

The statistical data available in Denmark in general and in this area in particular are based on national statistical codes. These codes state that in Denmark accommodations below 40 beds are not included as it would be too easy to identify each accommodation provider locally. Concerning camping the limit is 75 units.

The Dutch part of the Wadden Sea consists of three provinces: Noord-Holland, Friesland and Groningen. There is a fragmented situation reflected in the way tourism data are collected. Recent and good data are available, but there are no data for the entire Wadden Sea region. In the northern part of the Netherlands "Tourdata" is the most important organisation for collecting tourism data. Most recent data are from 2010 and they are collected for the three northern provinces: Drenthe (nor connected to the Wadden Sea at all), Groningen and Friesland. The province of Noord-Holland is not incorporated in the data collected by Tourdata.
The data collected by Tourdata are available per province and for regions within the provinces, but these geographical regions are not (always) connected to the Wadden Sea region. As a result we have to bear in mind that the presented data do not always reflect the specific situation for the Wadden Sea region! Data are available for the WaddenSea WHS, the islands and the Wadden Sea coastal area on the mainland but at until now they are not presented connected to that geographical entity.

Since 2007 Tourdata does offer the possibility to get data per municipality. In this way Tourdata could be asked to offer data for every municipality in those parts of the provinces of Friesland and Groningen which are relevant for this report. When (existing) data for the municipally of Texel in the province of Noord-Holland are added the picture will be quite comprehensive!

1 Basic data on tourism

1.1 German Wadden Sea region

1.1.1 Number and types of accommodation

1.1.1.2 Number and types of accommodation in Schleswig-Holstein (Nordfriesland and Dithmarschen)

In Nordfriesland County there is nearly three quarters more accommodation provider than in Dithmarschen County, together a total of 1,974.

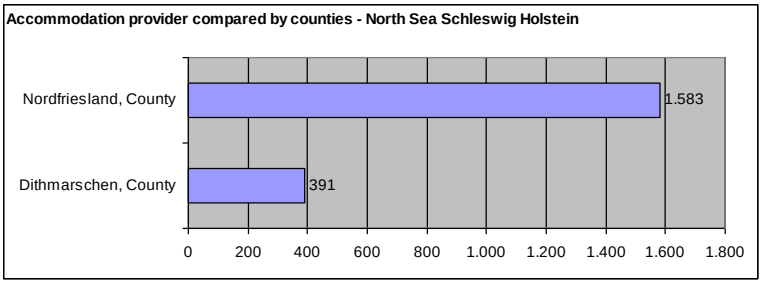

Figure 3: Accommodation providers compared by counties – North Sea Schleswig-Holstein (Statistic offices of federation and states)

Most of the accommodation providers have the type of convalescent and vacation home (inclusive camp grounds with a total number of 1,544). There are 404 hotels, hotels garnis and guesthouses.[1] Only 26 accommodation providers have the type of precaution and rehabilitation.

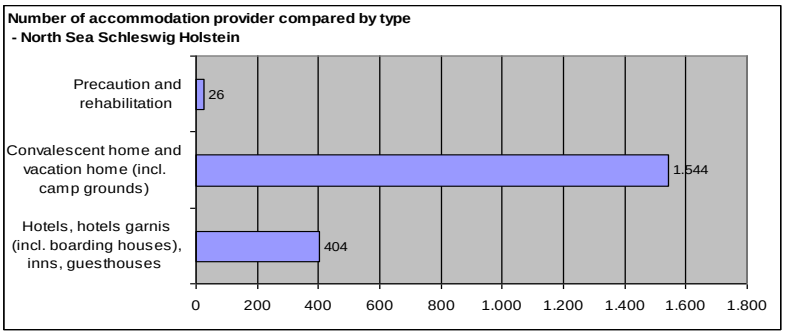

Figure 4: Number of accommodation providers compared by type – North Sea Schleswig-Holstein (Statistic offices of federation and states)

If you have a look at both counties Nordfriesland and Dithmarschen (figure 5), the biggest number of accommodation have the convalescent and vacation homes (inclusive camp grounds), in the Nordfriesland three quarter more (1,245) than in Dithmarschen (299).

[1] From the reporting year 2009 on according to the changing of WZ 2008 boarding houses are counted under hotels or hotels garni (according to the explanations of the Federal Statistical Office from 12 May 2011). In regional statistic Database Status January 2.

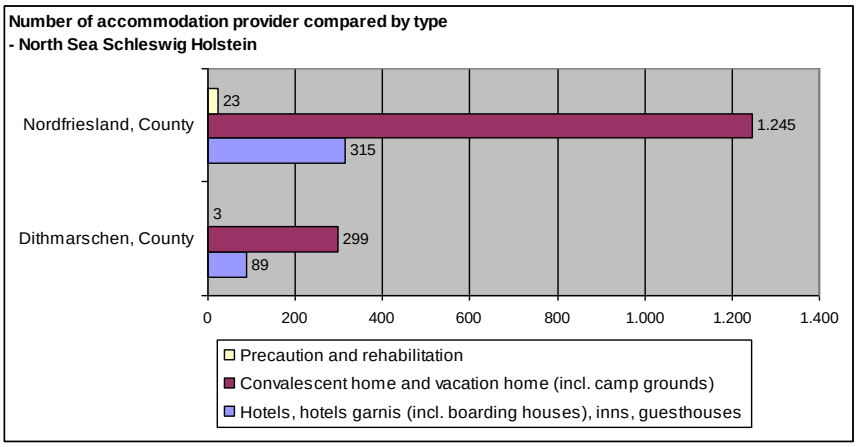

Figure 5: number of accommodation providers compared by type – North Sea Schleswig-Holstein (Statistic offices of federation and states)

1.1.1.3 Number and types of accommodation in Lower Saxony

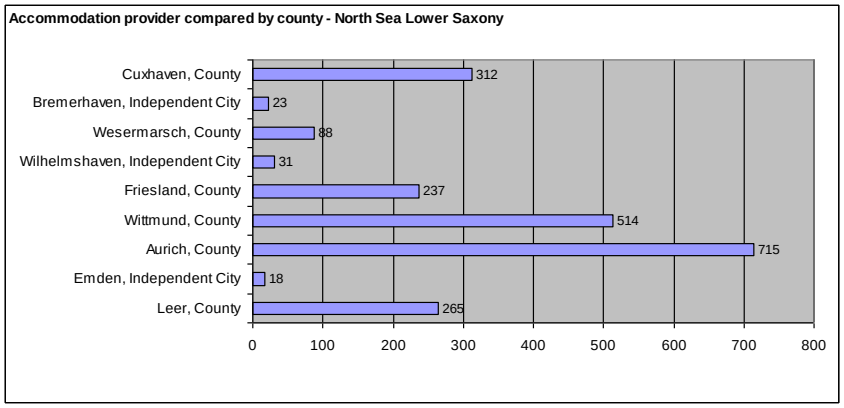

Figure 6: Accommodation providers compared by county – North Sea Lower Saxony (Statistic offices of federation and states)

Most of the accommodation providers are situated in the three counties Aurich (715), Wittmund (514) and Cuxhaven (312). In comparison there is quite a small number in the independent cities (Bremerhaven with 23, Wilhelmshaven with 31 or Emden with only 18).

Comparing the number of accommodation providers by type (figure 7), you can see a significantly high number of convalescent and vacation homes (incl. camp grounds). There are about half the number of hotels, hotel garnis and guesthouses (718) and a little number of precaution and rehabilitation accommodations.

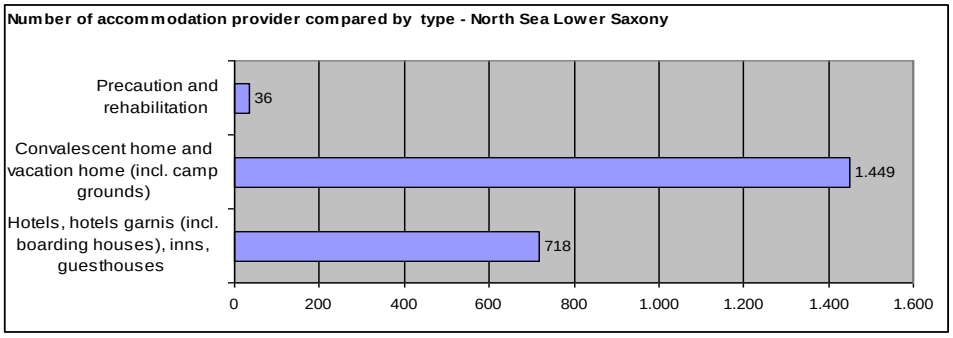

Figure 7: Number of accommodation providers compared by type North Sea Lower Saxony (Statistic offices of federation and states)

1.1.1.4 Comparison of accommodation statistics among Schleswig-Holstein and Lower Saxony

The comparison of the type of accommodation providers by county shows that similar to Schleswig-Holstein most of accommodations are convalescent and vacation homes (incl. camp grounds). The biggest number of accommodation in total is situated in Aurich (715). Also Wittmund has a totally high number of accommodations (514). The smallest numbers of accommodations are in Emden (18) and Bremerhaven (23).

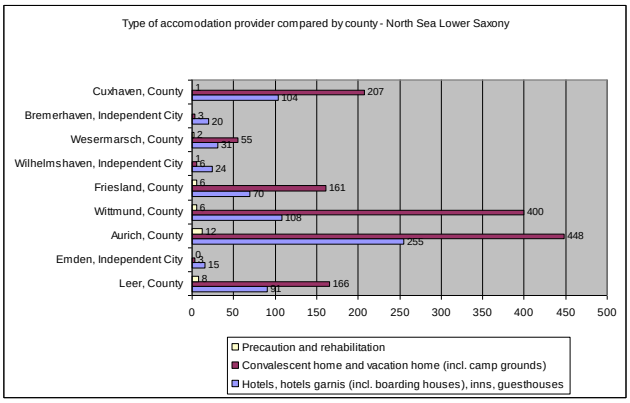

Figure 8: Type of accommodation providers compared by county – North Sea Lower Saxony (Statistic offices of federation and states)

The following figures give a comparison between North Sea Schleswig-Holstein and North Sea Lower Saxony with regard to number and type of accommodation provider.

Figure 9 shows that convalescent and vacation homes have in total the highest share, followed by hotels, hotels garni or guesthouses, with a comparatively higher number in Lower Saxony. There is only a small percentage of precaution and rehabilitation accommodation.

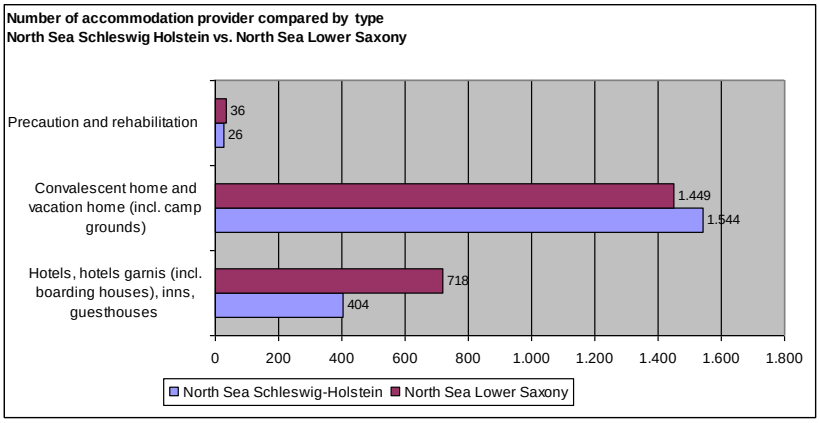

Figure 9: Number of accommodation providers compared by type North Sea Schleswig-Holstein vs. North Sea Lower Saxony (Statistic offices of federation and states)

Considering the counties and cities in both states (figure 10) the biggest number of accommodation is in Nordfriesland County (1,583
A comparison of the number of hotel beds in both states shows (figure 11), that there is, in accordance with the number of accommodation providers (see figure 8), the largest number of hotel bed offers in Nordfriesland. Cuxhaven has, in contrast to the relatively small number of accommodation providers a high number of hotel beds (27,876), almost as many hotel beds as in Aurich (32,910).

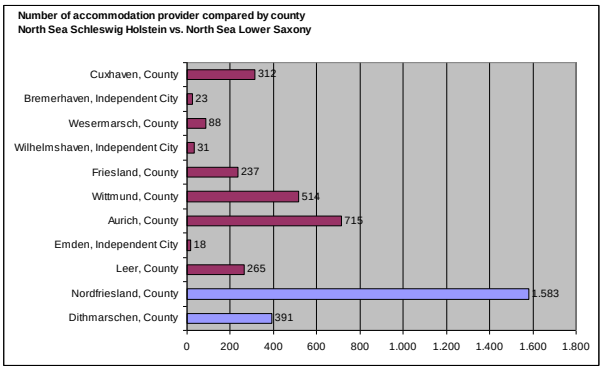

Figure 10: Number of accommodation providers compared by county North Sea Schleswig-Holstein vs. North Sea Lower Saxony
(Statistic offices of federation and states)

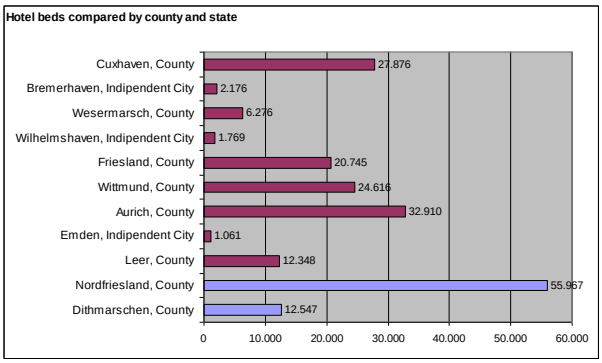

Figure 11: Hotel beds compared by county and state
(Statistic offices of federation and states)

1.1.2 Number of overnight stays in Schleswig-Holstein and Lower Saxony

Figure 12 shows a comparison between the arrivals and overnight stays in the single counties and cities of both North Sea states Lower Saxony and Schleswig-Holstein. As shown in figure 10, there is a high number of overnight stays in comparison with the number of arrivals, which is an evidence for a long duration of stay of tourists in the area who seem to spend their main annual holidays there rather than doing short trips. Most of overnight stays are in Nordfriesland (about 7 million), many overnight stays are also in Aurich (about 3,7 million), Wittmund (about 2,5 million) and Cuxhaven (around 2,4 million).

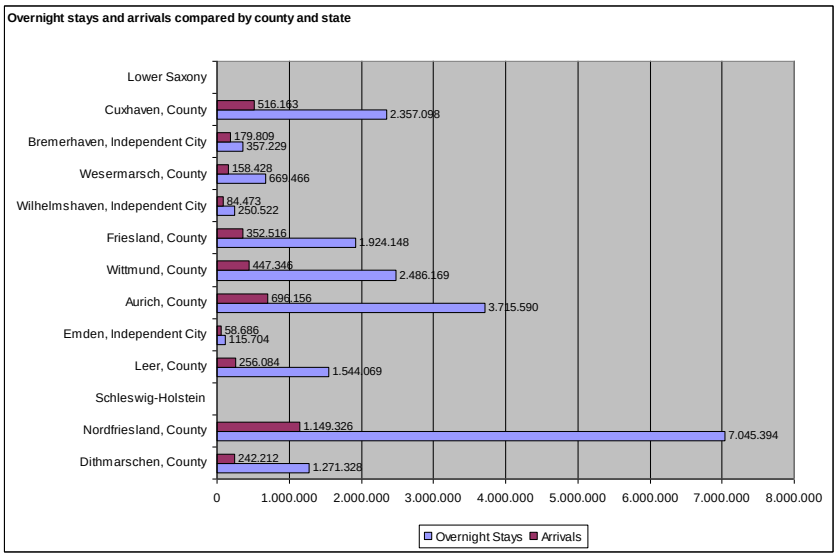

Figure 12: Overnight stays and arrivals compared by county and state (Statistic offices of federation and states)

Comparing the overnight stays and arrivals in both German states figure 13 shows a greater volume of arrivals and overnight stays in the North Sea Lower Saxony.

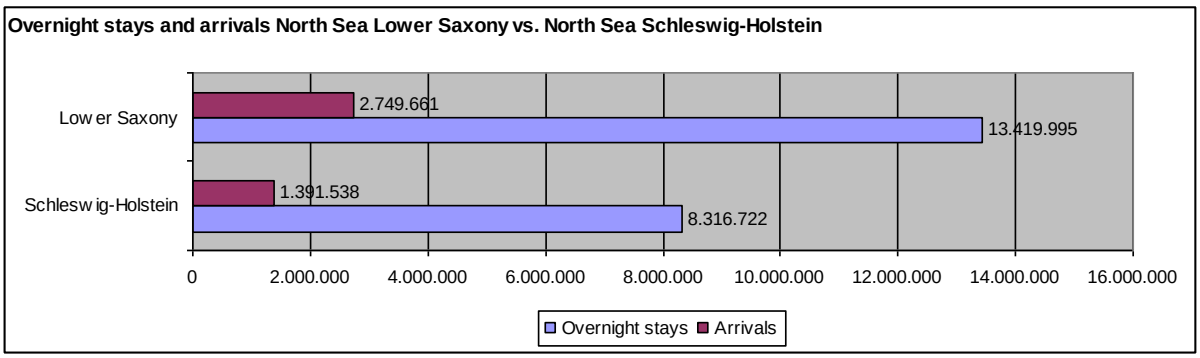

Figure 13: Overnight stays and arrivals in the North Sea Lower Saxony vs. North Sea Schleswig-Holstein (Statistic offices of federation and states)

<u>Annual amount compared by counties and independent cities</u>

The comparison of the average length of stays between the single counties and cities of Lower Saxony and Schleswig-Holstein shows, that in most of the counties the guests stay 5 or 6 nights in average. Only in the independent cities Bremerhaven (2), Emden (2) and Wilhelmshaven (3) it is less where tourists spend more short city breaks. It shows too, that the guests are mostly North Sea tourists and no business travellers (figure 14).

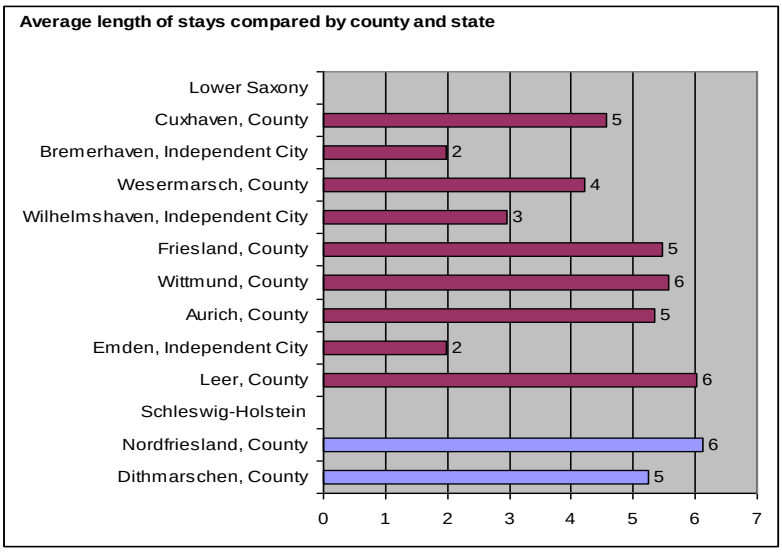

Figure 14: Average length of stays compared by county and state (Statistic offices of federation and states)

Figure 15 shows the dominance of overnight stays in precaution and rehabilitation accommodation (14 to 23 nights) compared to convalescent and vacation home (2 to 7 nights) and hotels/guesthouses (2 to 4 nights).

It is an important fact, that at the North Sea Schleswig-Holstein and Lower Saxony a large part of overnight stays are generated at smaller accommodation below 9 beds, which are not registered in the official statistics.

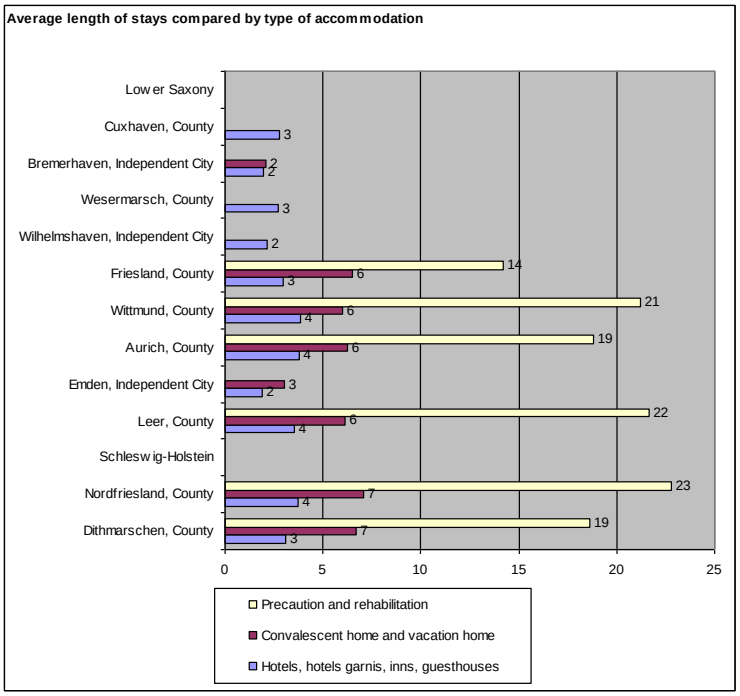

Figure 15: Average length of stay compared by type of accommodation (Statistic offices of federation and states)

Comparing the total number of arrivals and overnight stays on mainland and islands (figure 16 and 17) there is a predominance of overnight stays on the islands in Schleswig-Holstein, whereby there are slightly more overnight stays on the mainland than on islands in Lower Saxony. However, it can be stated that the islands in both German regions are important tourism destinations of the German North Sea and play a significant role in generating overnight stays.

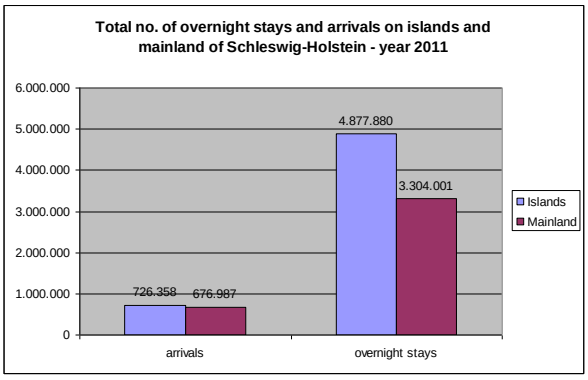

Figure 16: Total number of arrivals and overnight stays compared by island and mainland SH 2011

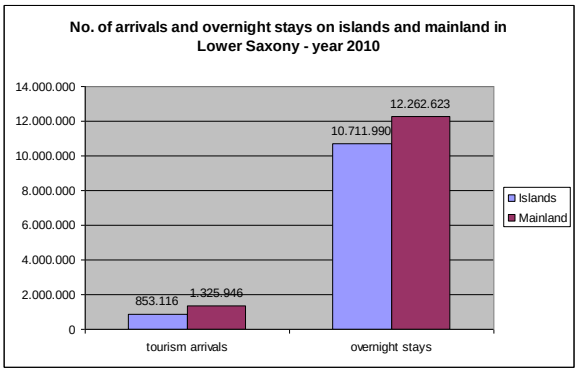

Figure 17: Total number of arrivals and overnight stays compared by island and mainland LS 2010

Figure 18 illustrates that the island Sylt has the largest share of overnight stays among the North Sea islands of Schleswig-Holstein, followed by Amrum and Föhr. In Lower Saxony the island Norderney is the main tourism destination, followed by Borkum and Langeoog.

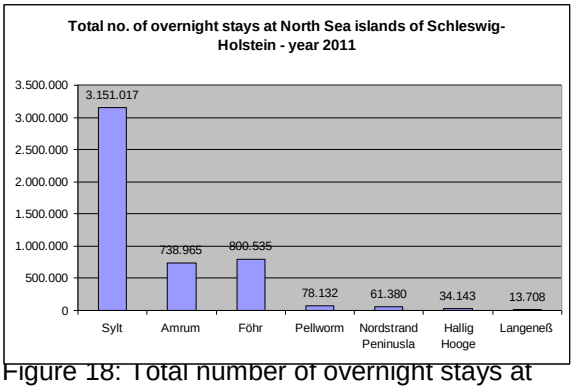

Figure 18: Total number of overnight stays at North Sea islands of SH 2011

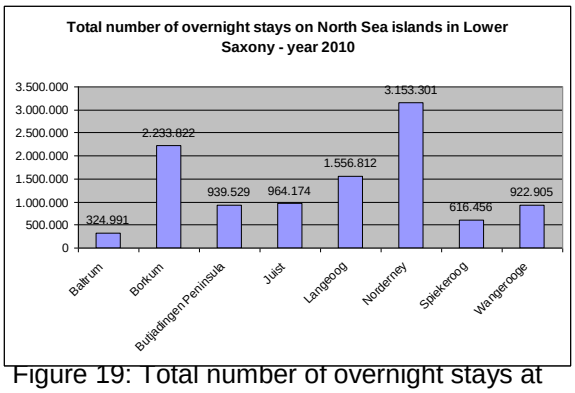

Figure 19: Total number of overnight stays at North Sea islands of LS 2010

As it's shown in figures 20 to 23, there is - compared to the number of national guests - quite a remarkably small number of international guest arrivals and overnight stays in all counties, cities and on the islands.

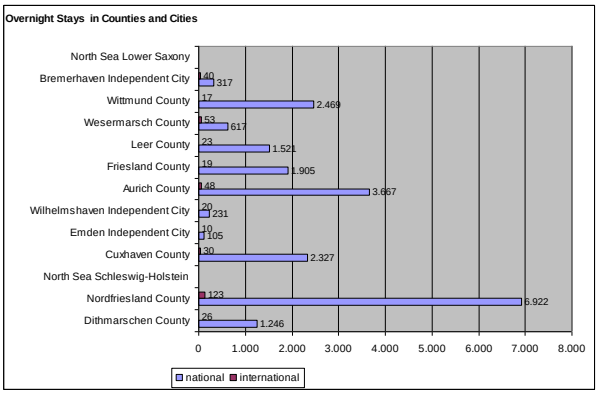

Figure 20: National vs. international overnight stays in counties and cities SH and LS (Statistic offices of federation and states)

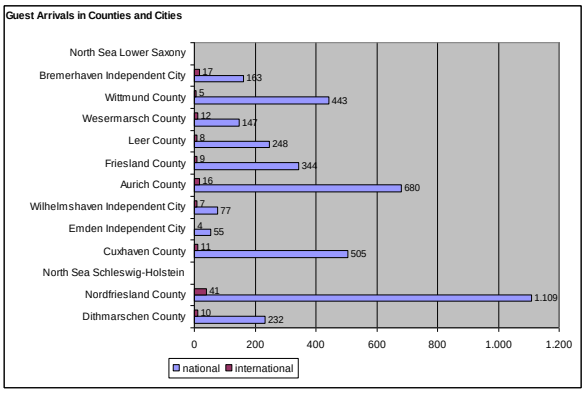

Figure 21: National vs. international guest arrivals in counties and cities LS and SH (Statistic offices of federation and states)

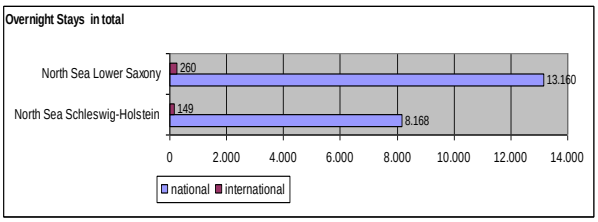

Figure 22: Total number of overnight stays of national vs. international guests (Monthly inquiry)

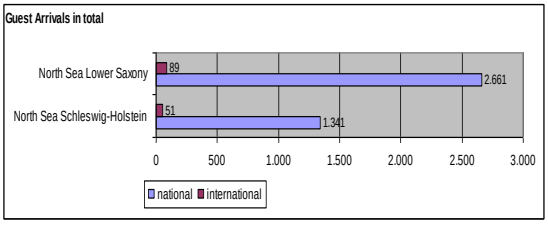

Figure 23: Total number of guest arrivals of national vs. international guests (Monthly inquiry)

Considering the annual trends in the regions of Lower Saxony (figure 24) a general growth of overnight stays can be stated in the last 5 years among most of Lower Saxony's regions. The highest increase of overnight stays since 2006 counts the North Sea coast and East-Frisian Islands of Lower Saxony.

The seasonal development varies in every region. Considering the Wadden Sea region of Lower Saxony, tourism demand at the North Sea coast and the East-Frisian Islands is currently concentrated very strongly on the months of July and August (see figure 25). In opposite to this there is a low demand in the winter season.

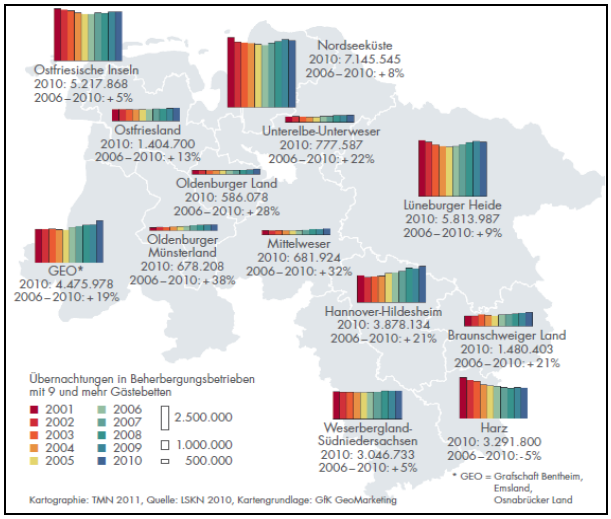

Figure 24: Lower Saxony: annual trends from 2001 to 2010 concerning the overnight stays (TourMarketing Niedersachsen GmbH (Hrsg.): Tourismus in Niedersachsen Zahlen – Daten – Fakten 2011. Mai 2011, S. 6)

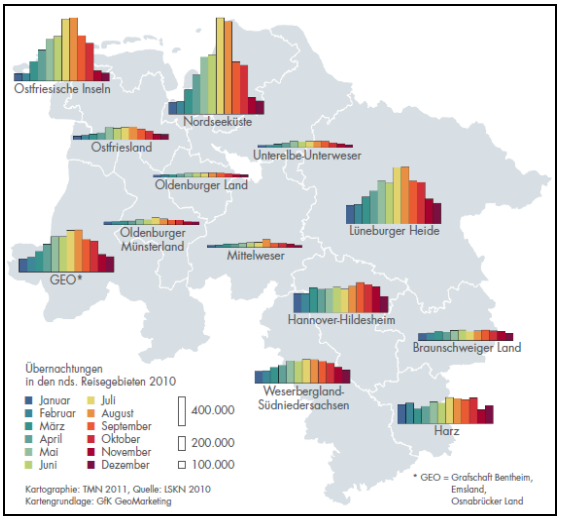

Figure 25: Lower Saxony: seasonal trends concerning the overnight stays (TourMarketing Niedersachsen GmbH (Hrsg.): Tourismus in Niedersachsen Zahlen – Daten – Fakten 2011. Mai 2011, S. 6)

There is a similar situation in Schleswig-Holstein, a continuing increase of overnight stays in the last 5 years.

1.1.3 Number of day visitors

There is a remarkable very high number of day visitors to the German North Sea, which amounts to nearly 20 million in Lower Saxony and 16 million in Schleswig-Holstein (2006).

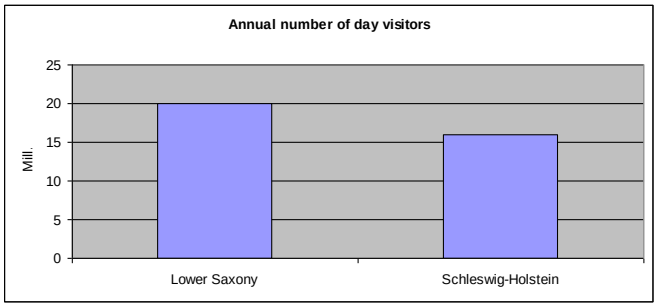

Figure 26: Number of day visitors (Dwif „Tagesreisen der Deutschen“ (Teil 3) (2006), S. 71; Nordsee 2010: Zahlen, Daten, Fakten, NTS, Juni 2010)

1.2 Danish Wadden Sea region

1.2.1 Number and types of accommodation

Destination Southwest Jutland has about 500 micro, small and medium sized enterprises within tourism and experience economy in the five municipalities. The number of enterprises covers accommodations, attractions, food and beverage, transport etc. in the core tourism and experience industry.

In the latest analysis of the socio-economic effects of tourism in the area, VisitDenmark covers the years 2008-2010. In this analysis, on which this section is based, only 84 enterprises have been used as they live up to the requirements of Denmark's Statistical Bureau of more than 40 beds in hotels and holiday centres and more than 75 units concerning camping sites.

By far the biggest product / accommodation is the second homes (summer houses) that are owned by private individuals. In Denmark each Dane is allowed by national law to own two second homes. Foreigners are not allowed to own second homes in Denmark. There are 13,430 second homes in the area. Each second home can by law be rented out up to a maximum of 39 weeks each year. This gives a total capacity each year of 524,000 houseweeks. In 2010 almost 134,500 houseweeks were 'sold'. In the area, Tønder Municipality and Varde Municipality have 75 % of the total number of second homes.

According to records of Destination Southwest Jutland the following table (can be established:

Type of accommodation	Total number
Hotel rooms / apartments	1,453
Hostels – number of beds	729
Camping units	8,933
Camping huts	1,891
Second homes	13,430
B&B rooms / beds	462 / 1,464
Holiday centres – rooms / beds	110 / 1,698
Huts / beds	24 / 132
Groups – beds	121
Folk High Schools – rooms	167

Table 3: Type and total number of accommodation in Southwest Jutland

A number of second homes are rented out, but are not registered anywhere. There is therefore a sort of black market concerning second home rental. On this point Southwest Jutland does not deviate from other second home areas in Denmark.

This obvious gap between the registered total number and the number used in the statistical report by VisitDenmark leaves an open space for guesses and assumptions about the total impacts of tourism and experience enterprises in the area.

The VisitDenmark report is, however, the only tool so far that can give an indication of impact. Therefore, there will be references to this report.

1.2.2 Number of overnight stays

Concerning the total number of overnight stays in the area, there has been a negative development over the last few years. From 2008 to 2010 there has been a decrease in overnight stays of 2.3 %, which is significantly higher than the national average of -0.8 %.

	2008	2009	2010	Development
Total	10,150	9,949	9,698	-2.3
Denmark	4,545	4,533	4,466	-0.9
Germany	4,955	4,864	4,706	-2.5
Norway	197	166	156	-10.9
Holland	170	170	155	-4.7
Sweden	92	71	73	-10.6
Great Britain	28	27	23	-8.7
Rest	164	119	119	-14.8

Table 4: Number of overnight stays national and international in Destination South West Jutland, in 1,000

Especially German-originating overnight stays have dropped. Varde Municipality has – for a while – had Denmark's largest share of camping overnight stays.

Considering the length of stay there are no specific calculations in Destination Southwest Jutland. In Denmark in general, the length of stay is 5 days with regard to foreign tourists, while Danish tourists stay 4 days – on average.

VisitDenmark has calculated that the overall season indicator is 2.7. In general a season indicator of 2.0 shows that there are twice as many overnight stays in July and August as in an average month. In average then, July and August are 2.7 times as big as the remaining months concerning overnight stays. Most sensible to seasonal developments are camping and yacht accommodation.

1.2.3 Day-visitors

There are no exact numbers regarding day-visitors. VisitDenmark has made calculations concerning the difference between commercial overnight stays on the one hand and non-commercial overnight stays and day-visitors on the other hand. Of the 9,698 Million overnight stays, 37.6 % comes from non-commercial overnight stays and day-visitors.

Tønder Municipality is the municipality with the highest actual number of non-commercial overnight stays and day-visitors. This can be seen in the revenues of Tønder, where 387 Million DKK comes from non-commercial overnight stays and day-visitors.

1.2.4 Turnover in hospitality industry

Again, no specific calculations have been made concerning tourists' daily consumption for Destination Southwest Jutland. In Denmark the average daily consumption of tourists is around 360 DKK. However, this number covers all types of accommodation – from second home stays to conference stays.

This development in overnight stays can be seen reflected in the drop in total tourism revenues and in the area.

	2008	2009	2010
Total tourism revenues	3,874 mio. DKK	3,852 mio. DKK	3,709 mio. DKK
Yearly development	-	-0.6 %	-3.7 %

Table 5: Annual development of total tourism revenues (VisitDenmark, 2011:2)

41 % of the total expenditure comes from rented second homes. 80 % - or 3 billion DKK - of the total expenditure comes from leisure tourists. Business tourism is mainly located in Esbjerg and is closely connected to offshore industry activities.

The tourism and experience industry in the area creates 5,305 jobs. This corresponds to 4.6 % of the total employment of the municipalities in 2010. It also gives a value growth of 2.8 billion DKK, which corresponds to 4.5 % of the total value growth of the municipalities in 2010.
For every million DK that is invested in tourism and experience industry 1.43 jobs will be created.

1.3 Dutch Wadden Sea region

1.3.1 Number and types of accommodation

To stay overnight there is a broad spectrum of facilities: camping sites, B&B, hotels, holiday houses and accommodations for groups (families, schools)

Concerning marinas in this information only marina with 20 moorings or more are included. The information does not only include commercial marinas, but also marinas of nautical associations. The biggest number of marinas however is based in the Frisian inland lakes.

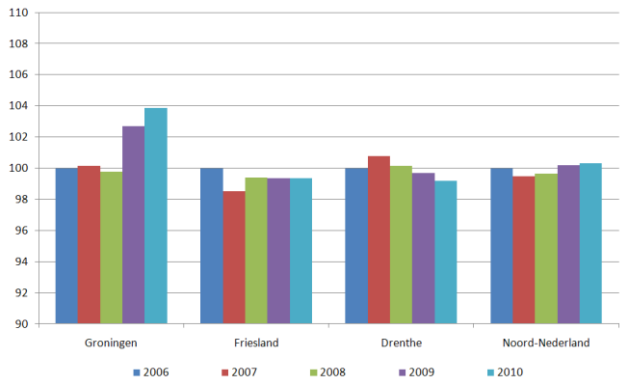

Figure 27: Development in capacity (number of beds) hotels in Noord-Nederland, index 2006-2010 (2006 = 100)

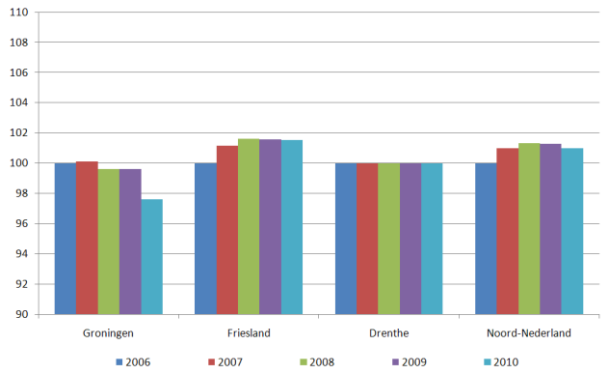

Figure 28: Number of moorings in marinas in Noord-Nederland (index 2006=100)

1.3.2 Number of overnight stays

There are available tourism data from Noord-Nederland (Texel Island not included). These data give an overview of the total number of overnight stays in the northern part of the Netherlands (figure 26 shows the total number of overnight stays x 1000 in the Northern part of the Netherlands per province (2010) and an overview of the development in capacity (see figure 29). Furthermore it shows that within the province of Friesland the Wadden islands cater for almost half of the total of overnight stays in the province, thus showing the importance of tourism for the island economy (see figure 30).

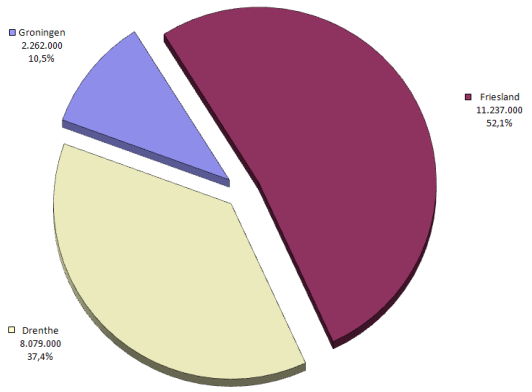

Figure 29: total number of overnight stays x 1000 in the Northern part of the Netherlands per province (2010)

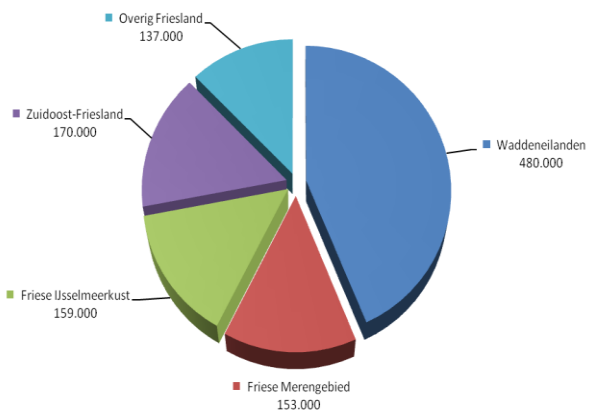

Figure 30: Number of hotel occupations in Friesland (x 1000) (2010)

Table 6 gives an overview about the total number of overnight stays per type and region in 2010.

	Hotels	B&B	Campingsites for tourists	Campingsites for seasonal quests	Accommodation for groups	Holiday houses	Second homes	Watersports	Total
Groningen	530	38	450	462	53	437	125	168	2.263
Friesland	1.099	107	1.386	2.350	935	3.464	333	1.573	11.246
Drenthe	630	45	1.465	1.787	328	3.329	477	26	8.089
West–Groningen	24	8	218	136	19	126	28	56	616
Groningen–Haren	280	4	21	9	8	14	25	28	388
Eemsmond	90	13	46	64	7	108	3	32	363
Oost–Groningen	136	12	165	253	19	190	70	52	896
Waddeneilanden	480	14	422	569	531	2.370	0	11	4.397
Friese Merengebied	153	16	196	509	235	395	154	873	2.531
Friese IJsselmeerkust	159	39	432	853	72	351	111	526	2.543
Zuidoost–Friesland	170	8	217	304	84	70	48	49	949
Overig Friesland	137	30	119	115	13	278	20	115	827
Noordmidden–Drenthe	328	13	644	1.008	144	857	264	22	3.279
Zuidwest–Drenthe	133	25	403	550	94	338	154	5	1.703
Zuidoost–Drenthe	169	7	418	230	90	2.134	59	0	3.107
Totaal	2.258	190	3.301	4.599	1.317	7.230	935	1.767	21.598

Table 6: Total number of overnights stays per region in 2010

The number of overnight stays on the so called “brown fleet” however is going down slightly (see table 7), mainly as a result of health and safety issues which are not always easy to implement on these historic vessels. This is also reflected in the limited growth in the number of berth in marinas.

	%	2001	2002	2003	2004	2005
West–Groningen	0,1%	1.183	1.020	858	965	960
Waddeneilanden	17,1%	286.882	247.459	208.036	234.122	232.871
Friese Merengebied	0,8%	13.940	12.024	10.108	11.376	11.315
Friese IJsselmeerkust	19,8%	332.882	287.138	241.394	271.662	270.211
Noord–Nederland	37,8%	634.886	547.641	460.396	518.126	515.358
Nederland	100,0%	1.678.416	1.447.770	1.217.125	1.369.742	1.362.426

Table 7: Number of overnight stay on sailing charters (so called brown fleet) 2001–2005

Generally speaking the number of tourist is slightly going down, as a result of the average occupation in hotels and other accommodations (see figure 28). Due to a higher average expenditure this hardly results in fewer jobs.

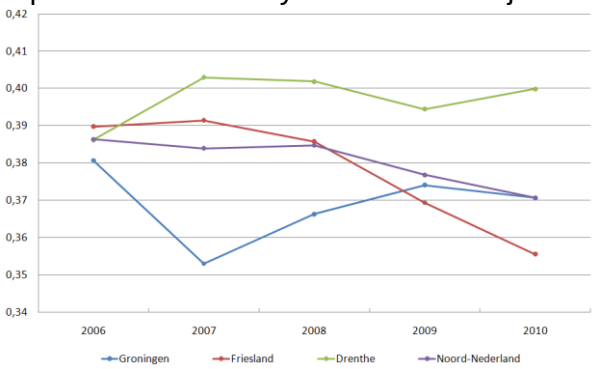

Figure 31: Trend in the average occupation of Hotels / pensions in Noord–Nederland, 2006–2010

1.3.3 Economic data

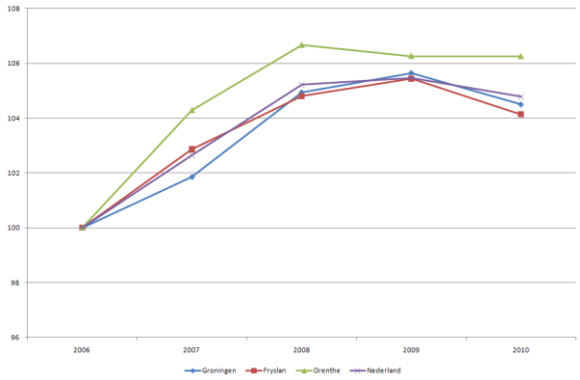

Figure 32: Employment in tourism, development between 2006-2010 (index 2006=100)

Generally speaking the number of tourist is slightly going down, as a result of the average occupation in hotels and other accommodations. Due to a higher average expenditure this hardly results in fewer jobs.

Table 8 shows the total expenses of tourists in Noord-Nederland 2010.

Expenses day-tourism (x € 1 mln.)		Expenses overnight - tourism (x € 1 mln.)	Total expenses tourism (x € 1 mln.)
Groningen	€ 458	€ 116	€ 574
Friesland	€ 497	€ 518	€ 1.015
Drenthe	€ 370	€ 366	€ 736
Noord–Nederland	€ 1.325	€ 1000	€ 2.325

Table 8: Total expenses of tourists in Noord-Nederland 2010

2 Infrastructure per region

2.1 Infrastructure in the German Wadden Sea region

2.1.1 Traffic infrastructure in the German Wadden Sea region

The analysis of the rail links (see figure 33) shows two shortcomings: first, there is a lack of a better regional railway line along the Lower Saxony Wadden Sea coast – there is even a complete lack in such a line in Ostfriesland. Second, there is a lack of significantly better, faster and direct connections from the main source regions/states directly to the destinations on the Lower Saxony North Sea coast. So far only Emden (ferry Borkum) and North Dike (ferry Juist, Norderney) are well connected.

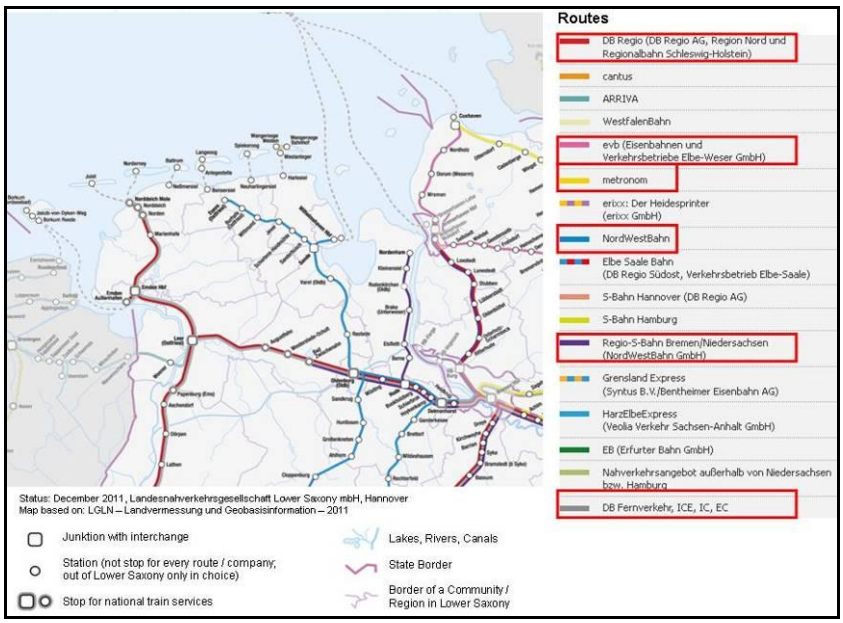

Figure 33: Lower Saxony railway network (www.lnvg.de/interaktive-karte-streckennetz)

What is worth mentioning is the "Urlauberbus" (holiday bus), which has its route network along the coast and in the mainland. The Urlauberbus runs between Oldenburg and Wilhelmshaven in the east and the north and Emden and Leer in the west (figure 31)

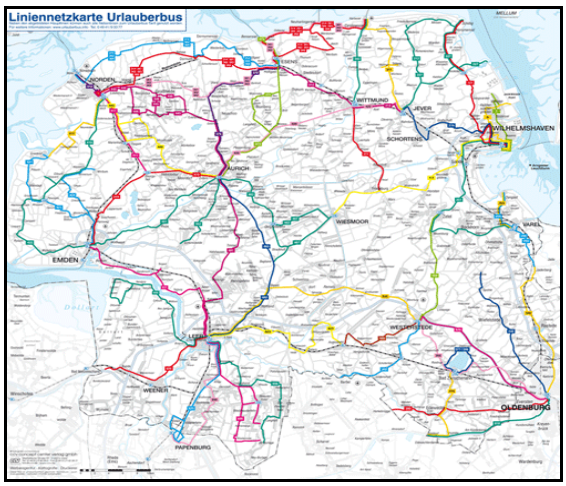

Figure 34: Lower Saxony bus network (www.urlauberbus.info)

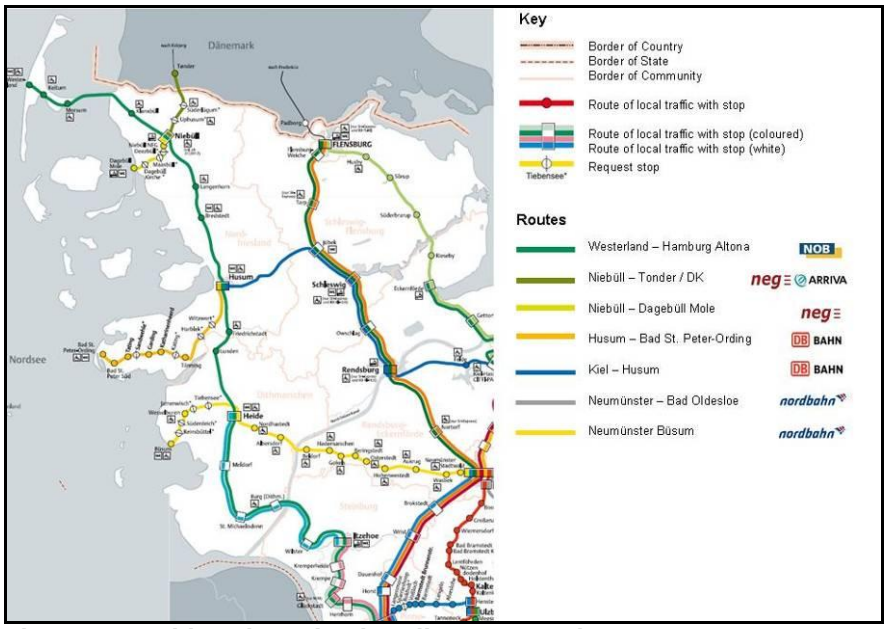

Figure 35: Schleswig-Holstein railway network (www.bahn.de/p/view/buchung/karten/streckennetz.shtml)

In Schleswig-Holstein the situation differs. Main railway lines run from or via Hamburg, and there are connections to the coastal destinations St. Peter Ording, to Dagebüll, Büsum and to the island Sylt. However, for most coastal destinations there are no direct railway connections, which makes several train changes necessary.

2.1.2 Main tourism infrastructure types and visitor attractions / hot spots

The following pictures (figure 36 and 37) give a short impression of the main tourism hot spots and visitor attractions, which are water - and land based with focus on the most important types of attractions, which are towns & cities; UNESCO World Heritage sites; national parks & nature parks; palaces, parks & gardens; spas and health resorts; wellness; theme parks and medical tourism offers).

Figure 36: Schleswig-Holstein main visitor attractions (www.germany.travel/en/index.html)

Figure 37: Lower Saxony main visitor attractions (www.germany.travel/en/index.html)

Tourism infrastructure and visitor attractions (e.g. swimming pools, beaches, museums and marinas) are mainly located on the coast. Especially spa and wellness centers with focus on thalasso are concentrated at the whole North Sea. There are also many ferry routes connecting mainland and the islands / Halligen.

2.2 Infrastructure in the Danish Wadden Sea region

2.2.1 Traffic infrastructure

The main means of transportation to Destination Southwest Jutland is by car. Even though biking and hiking are getting more and more interesting for leisure tourists to the destination, the car is still by far the most important means of transportation. Many leisure tourists bring their own bikes – especially German tourists. They then use the rented second home as a base for excursions in the area – either directly on bike, or by bringing the bikes to a specific area of interest and then use the bikes. For instance, a visit to the Nationalpark Vadehavet.

From other parts of Denmark there is quite easy access to the destination. There is the motorway E20 that connects Esbjerg to the rest of the motorway system – both in Denmark and the rest of Europe. From Germany access is also easy – depending of course where the leisure tourists are going in the destination. A visit to Esbjerg, Fanø, Blåvand and Henne would probably go via motorway E20 that connects to E45/A7. A visit to Tønder, Rømø and Ribe would probably go via motorway A7/E45 and connect with highway 8 and 11.

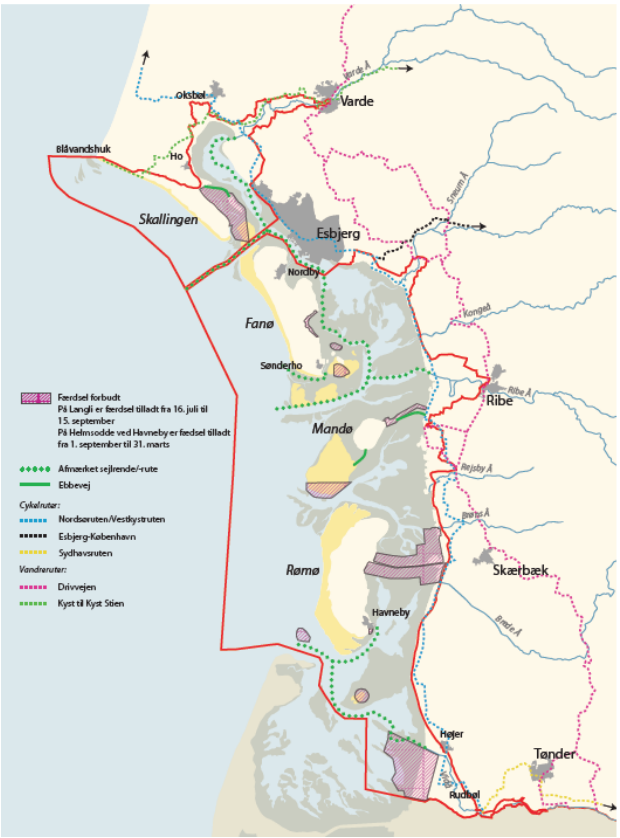

Figure 38: Routes in connection with the Nationalpark Vadehavet

By car there are good connections in the destination as well. The national (scenic) route "Margueriteruten" is clearly marked and provides good opportunities to experience the whole destination.

The international hiking route "North Sea Trail" and the international bike route "North Sea Cycle Route" connect the destination with the rest of Denmark and also Norway, Germany, Holland, Great Britain and Scotland.

The map shows some of these routes in connection with the Nationalpark Vadehavet.
It is also possible to visit the destination by plane or train. Esbjerg Airport is the closest airport, but it is not very well connected. Billund Airport is very well connected to the rest of the world – especially outbound travel, but also increasingly inbound travel. But connections to and from Billund is a challenge when it comes to leisure holidays in rented second homes and camping as these types of leisure holidays are based on own transportation.

By train it is possible to reach Esbjerg from the rest of Denmark and from Germany. There are also minor train connections in the area connecting Tønder and Ribe for instance with Germany (via Husum).

2.2.2 Main tourism infrastructure types and visitor attractions / hot spots

Destination Southwest Jutland has around 500 micro, small and medium sized enterprises within the tourism and experience industry. This combination of enterprises is quite typical for coastline destinations in particular and in tourism worldwide. Finland for instance has up to 92 % micro, small and medium sized enterprises.

The super infrastructure of tourism in the destination is characterised by concentrations of especially second homes. In connection with these concentrations other types of super

infrastructure have sprung up over the years like camping sites with swimming pools, holiday centres, attractions, shopping facilities etc.

The super infrastructure of tourism follows these concentrations and the above-mentioned hot spots in the destination. Rømø, Fanø, Blåvand, Vejers Stand and Henne are the main concentrations, but there are second homes spread unevenly all over the destination – mostly of course along the coastline.
There are a number of golf clubs in the destination. For instance Blåvandshuk Golfklub, Esbjerg Golfklub, Breinholdgård Golf Klub, Fanø Golf Links, Kai Lykke Golfklub, Ribe Golf Klub and Rømø Golf & Wellness.

The castle of Schackenborg close to Tønder is a very important part of the super infrastructure of tourism in the destination – even though the royal family hardly sees the castle as such. Many tourists visit the castle and the castle area during a season. Especially buses include Schackenborg as an important part of a scenic tour in the destination.
The most important beaches have already been mentioned: Rømø, Fanø, Blåvand, Vejers Stand and Henne.

Attractions	Number of visitors in 2009
Fiskeri- & Søfartsmuseet	139,133
Ribe Domkirke	62,188
Blåvandshuk Fyr	56,188
Museet Ribes Vikinger	43,775
Sdj. Kulturhistorie Tønder	41,752
Vadehavscenteret	30,598
Lintrup Safari Zoo Park	26,000
Kunstnerhuset Skærbæk	25,000
Minibyen i Varde	20,423
Esbjerg Museum	17,456
Enghave Dyre- og Naturpark	16,500
Esbjerg Kunstmuseum	14,283
Vejen Kunstmuseum	13,875
Ribe Kunstmuseum	13,425
Hjemsted Oltidspark	12,200
Tønnisgaard	12,000
Museet på Sønderskov	11,703
Museet Danmarks Brandbiler	9,896
Fanø Kunstmuseum	8,000
Orion Planetarium	7,890
Esbjerg Vandtårn	6,331
Havnerundfarten i Esbjerg	4,355
Fanø Dragtsamling	2,838
Hannes Hus	2,600
Museumsfyrskib Esbjerg	2,400
Det Gamle Rådhus	1,622
Fanø Museum	1,000
Ribe Vikingecenter (Viking Ccentre of Ribe)	43,000
Black Safari - guided tours (private operator)	35,000
Total	**712,886**

Table 9: Main attractions and visitor numbers (destination Southwest Jutland 2010)

In 2004, it was estimated that around 2 million people each year visited the beaches of Rømø (Tønder Municipality) and Fanø (Fanø Municipality), and that approximately 250,000 people visited Hvidbjerg Strand (Varde Municipality). The beaches of Destination Southwest Jutland are in most cases – together with the North Sea – the main reason to go and the main reason to stay.

A number of cities and towns are supplementing the beaches and in general the nature in the area. From north to south: Henne, Vejers Strand, Blåvand, Esbjerg, Fanø, Ribe (the cathedral of Ribe and the historic city of Ribe), Højer Sluse, Kongeåen, Møgeltønder (with the royal castle) and the city of Tønder.

These hot spots are also central in the new progressive tourism strategy of Destination South West Jutland from 2012 to 2015. And probably onwards.

2.3 Infrastructure in the Dutch Wadden Sea region

The Dutch Wadden Sea region is easily accessible by car and in fact most visitors come by car.
Den Helder and Harlingen are connected to the national railway system. These cities are gateways to the islands of Texel, Vlieland and Terschelling. Holwerd and Lauwersoog are gateways to the island Ameland and Schiermonnikoog. Both places are well connected to public transport by coach.

Texel, Ameland and Terschelling are accessible by car, but (except the short ferry crossing from Den Helder to Texel), car transport is expensive. As a result and due to limited possibilities of cars on Ameland and Terschelling, visitors generally leave there car in a car park on the mainland. Vlieland and Schiermonikoog are not accessible for visitors by car at all. Main transportation on the island is the bike. This can be privately owned bikes from visitors or rented bikes. The biggest car rental companies in the Netherlands are found on the islands. There is limited public transport on the islands either by minibus/ taxibus or by coach.

3 Tourism demand – main activities for different target groups

3.1 Tourism demand in German Wadden Sea region

3.1.1 Type and main motivation of holidays

Concerning the type of holiday based on planned holiday trips compared by destination the biggest interest in both German regions is in relaxation, nature, family and beach / swimming activities, while in Schleswig-Holstein nature motives are more relevant than in Lower Saxony (see figures 39 and 40). Far less important, in contrast, are for instance adventure, sightseeing or health holidays. Not relevant are study or culture trips.

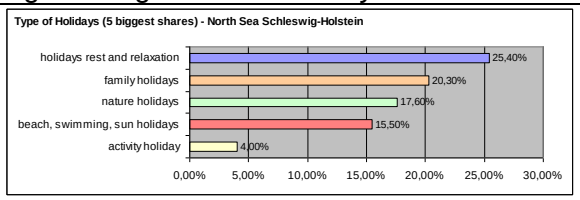

Figure 39: Main types of holiday in North Sea Schleswig-Holstein (FUR, Reiseanalyse RA 2010)

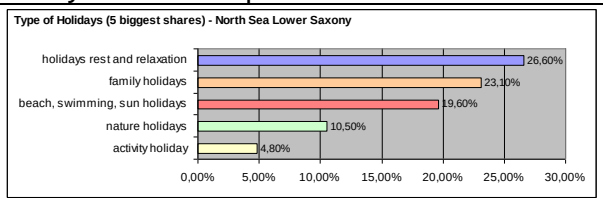

Figure 40: Main types of holiday in North Sea Lower Saxony (FUR, Reiseanalyse RA 2010)

Figure 42 shows single motives for travelling to the North Sea. It should be noted that in Lower Saxony almost all motives are a few percent higher. Main motives are sunny/nice weather, relaxing and having time for free and for each other and experiencing nature, but also fun and pleasure play an important role. Adventure or sports activities are less important motives. Concerning the motivation according to nature tourism there is a great motive in experiencing nature within a nice landscape, clean water and air (61,8% LS, 59,3% SH), healthy climate (54,5% LS, 52,4% SH) and getting away from polluted environment (21% LS, 18,8% SH).

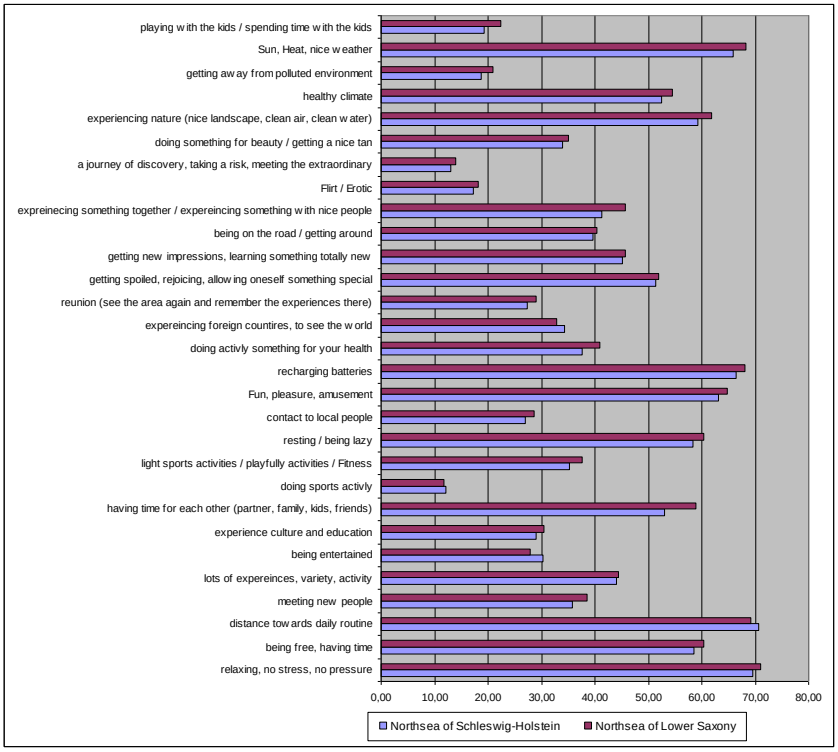

Figure 41: Motivation for holidays in Schleswig-Holstein and Lower Saxony, SH: n=2034, Lower Saxony: n=1373 (of 7660) (FUR, Reiseanalyse RA 2010)

3.1.2 Main holiday activities of visitors

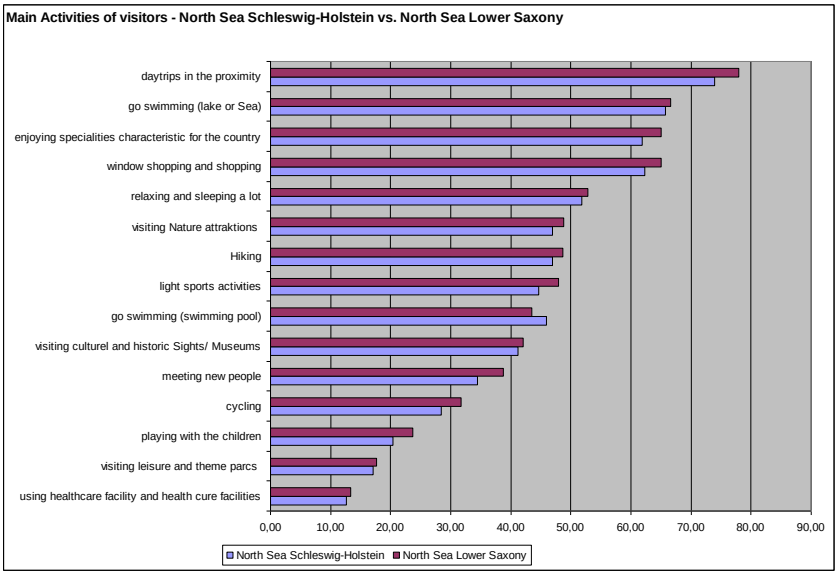

Figure 42: Main holiday activities of visitors (FUR, Reiseanalyse RA 2010)

Figure 42 shows main activities of visitors in the German North Sea region. Especially daytrips, swimming, enjoying specialities and shopping play an important role. Less important are cycling, visiting leisure and theme parks or using healthcare facilities. Main activities according to nature tourism are hiking (46,9% SH, 48;6% LS), visiting nature attractions (46,9% LS, 48,8% SH) and cycling (28,4% LS, 31,7% SH).

3.1.3 Main target groups

Based on the main motives and types of holidays in the German North Sea region in Schleswig-Holstein there is a specific marketing focus on following main target groups:

- Demanding connoisseur
- Families with small children
- Best Ager

These target groups are being addressed by four basic topics (gastronomy, health, cycling, beach/swimming) and five specific topics (golf, culture, nature experience, horse riding, sailing) - regional specifics included (see table 10).

The regional marketing organisation for the Lower Saxony North Sea region describes the ideal type of brand target group, who:

… is 30-39 years old and has an above average income
… is located in southern Germany
… is active, spontaneous, liberal, athletic and health-oriented
… likes to go out and is willing to spend money for a good meal
… does not have school-age children
… has little time and prefers shorter travels, but makes more often than once a year holidays and is therefore looking for attractive tourism offers in the off-season

Target Group / Topic	Demanding connoisseur	Families with small children (high / middle income)	Best Ager	Regional focus
Basic Topic				
Gastronomy	Plus Night Life			All
Health	- Fitness - Medical Wellness - Prevention	- Fitness - Medical Wellness - Prevention	- Fitness - Medical Wellness - Prevention	All
Cycling				All
Beach / Swimming				North Sea Baltic Sea
Spezific Topic				
Golf				All
Culture				All
Experience nature				All North Sea
Horse riding				Inland / HLMS Coasts
Sailing				Baltic Sea

Table 10: Main target groups and relevant topics of tourism marketing in Schleswig-Holstein (Masterplan - Strategische touristische Ausrichtung für die Nordsee Schleswig-Holstein, S. 14)

3.2 Tourism demand in Danish Wadden Sea region

3.2.1 Type and main motivation of holiday

The main product in Destination Southwest Jutland is leisure holidays, typically in rented second homes and in caravans / tents at camping sites.

Main activities are family based activities. VisitDenmark has published results of the 10 most important motives for visiting Denmark:

… Nature	… Attractions and entertainment
… Clean land	… Danish food
… Safe place	… Shopping
… Children friendly	… Activities
… The population in general	… Cultural and historic attractions
	(VisitDenmark, 2010)

There is no specific research into the motives to visit Destination Southwest Jutland besides the more or less tacit knowledge of the tourists' activities and motives that the LTOs posses.

3.2.2 Main target groups and activities

There seems to be two typical types of leisure tourists to Destination Southwest Jutland. One type, which is the biggest group by far, is the family with kids. This group is motivated by attractions, amusement parks, child friendliness, activities and nature. Region South Denmark, to which Destination South West Jutland belongs, has the biggest share of this particular type of tourist to Denmark with 33 % of the total market volume in Denmark. This group of leisure tourists is called “Fun, games and learning”.

The other typical group is the so-called DINKs (double income no kids) group. This group is motivated by nature, safety, population, cultural and historic attractions, hiking and good food. Again Region SouthDenmark has the biggest share of this particular type of tourism to Denmark with 33 % of the total market volume in Denmark. This group of leisure tourists is called “The good life” (VisitDenmark 2011).

A research article that focused on camping experiences at a specific camping site in Destination South West Jutland showed that camping guests – when asked – want a number of activities, but when observed and later on confronted with the observations it was clear that most of the camping guests did absolutely nothing. They enjoyed being at the camping site; enjoyed a walk to the beach; enjoyed talking to each other and more along that line. The report showed a remarkable gap between what the camping guests said and what they actually did. This corresponds very well with both groups of leisure tourists above.

3.3 Tourism demand in Dutch Wadden Sea region

3.3.1 Activities and main target groups

Most important land based tourism activities are beach activities, (mudplain) walking and cycling. Water based activities are mainly sailing on a traditional sailing barge (the so called “brown fleet”) or sailing in rented or private sailing boats.

There is a wide variety of visitors: youngsters going to the islands to party, families with children, retired people. Most of the islands cater for all these groups.

4 Tourism organisations in the Wadden Sea

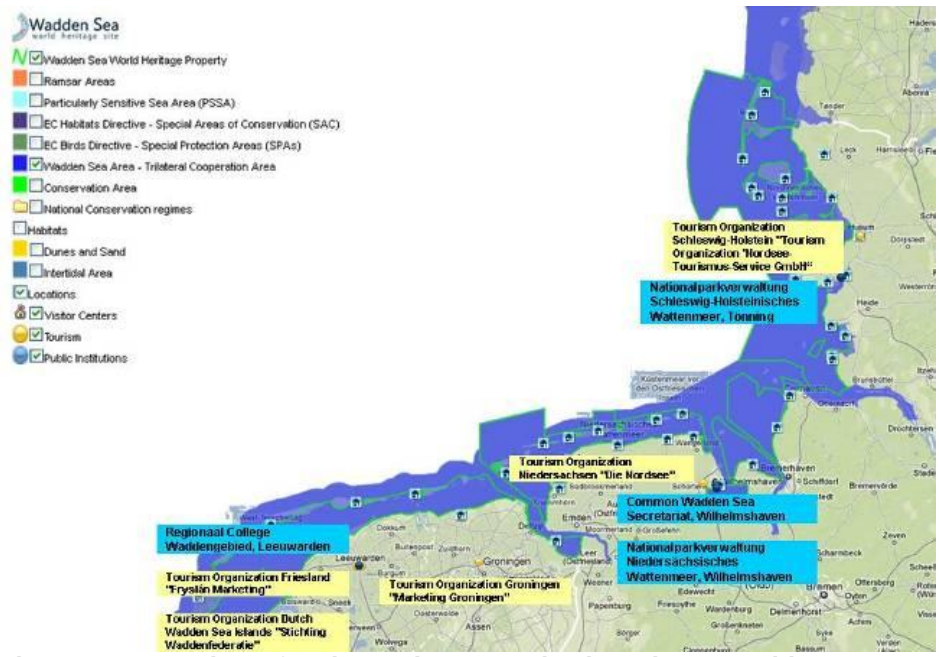

Figure 43: Overview of main tourism organizations (www.waddensea-worldheritage.org/cwssmap)

The picture above gives an overview of main existing organisations in the whole Wadden Sea region. Still not included here is the Danish part.

4.1 Structure of tourism organisation in the German Wadden Sea region

In the German Wadden Sea region Schleswig-Holstein has 3 levels of tourism organisations that illustrates the organigram below.

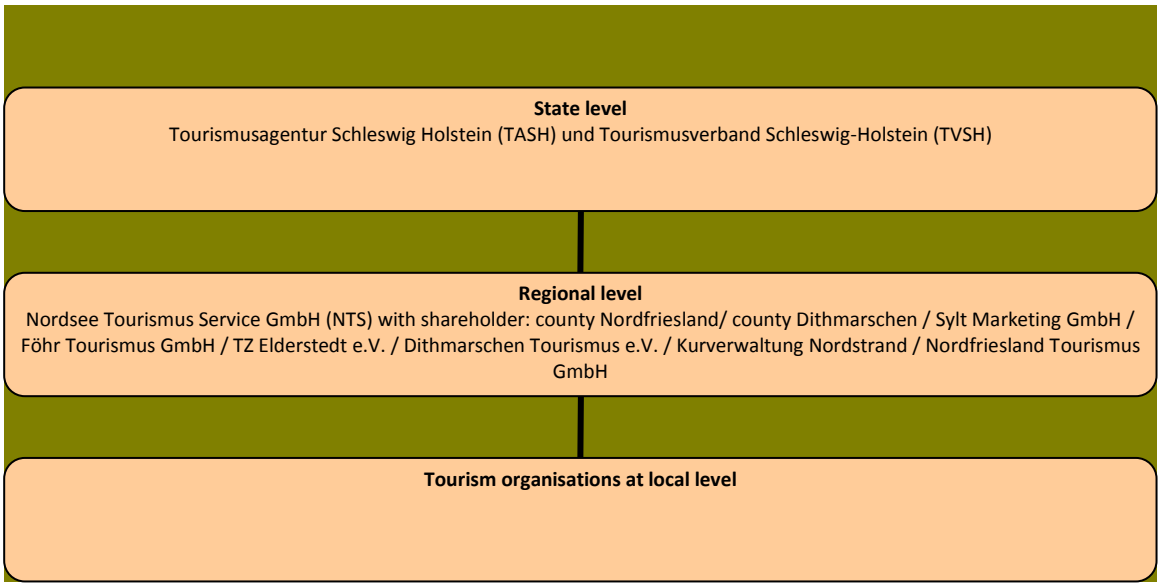

Figure 44: 3-level-model of tourism organisation North Sea Schleswig-Holstein (based on nordsee*schleswig- holstein- Mehrwert (Zahlen. Daten. Fakten), Nordsee-Tourismus-Service GmbH (NTS), 2010)

Members of the marketing committee of the Nordsee Tourismus Service GmbH are Dithmarschen Tourismus e.V., Wirtschaftsförderungsgesellschaft Nordfriesland mbH, Amrum

Touristik, Nordfriesland Tourismus GmbH, Insel Sylt Tourismus-Service GmbH, Tourismus- und Stadtmarketing Husum GmbH/Husumer Bucht - Ferienorte an der Nordsee e. V., Kurverwaltung Helgoland, Sylt Marketing GmbH, Tourismus Marketing Service Büsum GmbH, Föhr Tourimus GmbH and Tourismus-Zentrale St. Peter-Ording.

The shareholders and marketing committee are actively involved in the work of Nordsee Tourism GmbH (as well as in the field of World Nature Heritage). Furthermore the NTS represents the interests of her shareholders and the marketing committee at state level and on the topic World Heritage Wadden Sea at trilateral level.

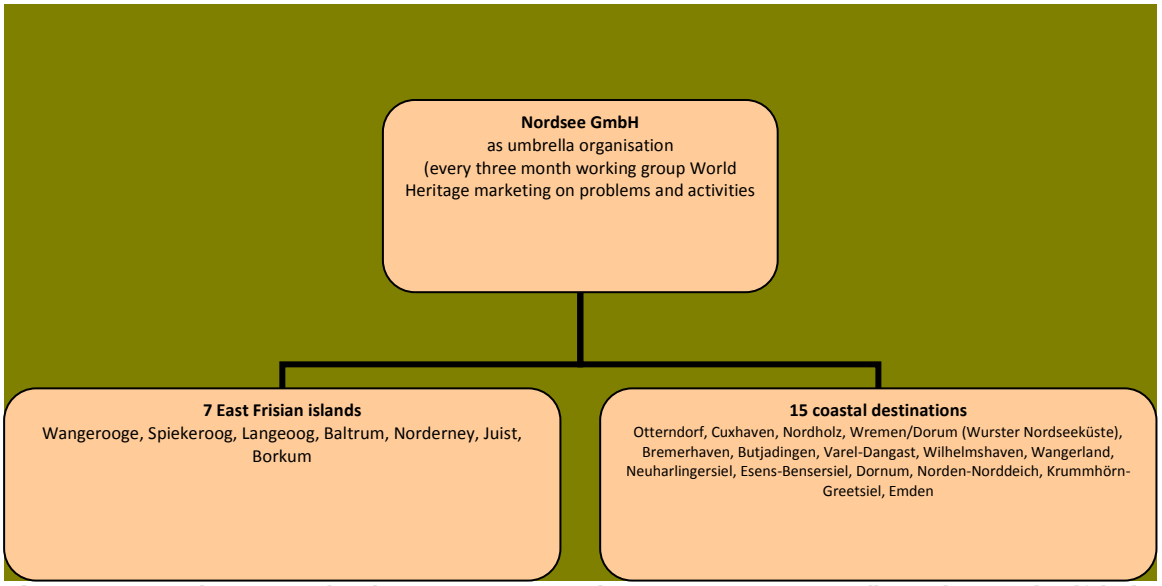

Figure 45: Tourism organisation structure North Sea Lower Saxony (based on "Mittelfristige Strategieplanung der Nordsee GmbH", 2011)

The Nordsee GmbH is the regional tourism marketing organisation for the Lower Saxony North Sea coast from Emden to Otterndorf and the Seven East Frisian Islands with the task to promote the region and attract new guests. In total the Nordsee GmbH has 22 member destinations and 12 other members (accommodation providers, ferry companies and airlines).

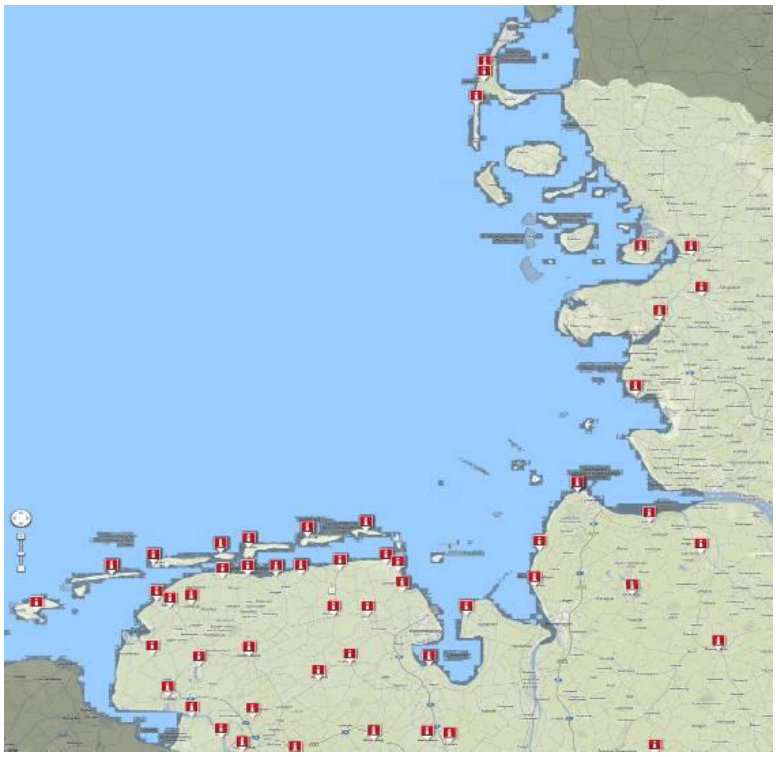

Figure 46: overview of tourist information offices (www.germany.travel/en/index.html)

The map above gives an overview of existing tourist information offices in the German Wadden Sea region. Following tables (11 and 12) list all relevant contacts and information centers for the German Wadden Sea region.

4.2 Structure of tourism organisation in the Danish Wadden Sea region

The tourism development in the Danish part of the Wadden Sea is organised in different layers. These layers, however, are interconnected.

The first layer is the local tourism organisations (LTOs). There are 5 LTOs in the area. Traditionally there have been LTOs in Denmark since tourism was first organised in 1889. These LTOs have been and are still in many cases the local marketers of tourism, and they also develop new tourism activities in close cooperation with local tourism operators. Many LTOs receive financial and political support from local tourism operators through member fees and from the municipalities. However, some LTOs operate more or less without municipal support due to income from renting out summer cottages on a commercial basis. An example is Tønder Tourism Organisation (Tønder Turistbureau).
The second layer is the five municipalities. The municipalities give financial and political support to the LTOs. However, there are developments towards a more centralised and stringent system. The municipalities are responsible for infrastructure, renovation, sewerage etc.

The third layer is the destination called Destination Sydvestjylland (Destinaton Southwest Jutland). This destination is relatively new. It was started in 2008 as a foundation for an application to the Region of South Jutland to develop sustainable tourism experiences in the Wadden Sea (Vadehavsprojektet) and it had a budget of 22 mio. DKK. The project ends by the end of 2012. The destination was formed as a loose cooperation between the LTOs and the municipalities and it was formalised in 2009, when the journey towards a united tourism strategy was started. In 2009 a number of focus areas were identified and a prioritised list

was established and carried out – especially in the Vadehavsprojektet (Wadden Sea Project) from 2009-2012). Today, a number of projects have been carried out – all including local tourism operators.
The destination is now working on a progressive strategy that will lead the destination, the local tourism operators, the LTOs and the municipalities into a completely new future. The focus of the strategy is the local tourism operators. The strategy focuses on development, but in a sustainable way. The destination has included close cooperation with the Nationalpark Vadehavet in the strategy.

Also at this third layer the Nationalpark Vadehavet can be found. The Nationalpark Vadehavet was officially opened in 2010, but had been underway for some years. The Nationalpark Vadehavet is a major player in developing the area concerning fishery, farming, tourism etc. The Nationalpark Vadehavet has per 1 April 2012 published the Draft Management Plan for the Wadden Sea National Park Plan to 2018 for public comment. It is a comprehensive plan that includes tourism in a sustainable way. It also includes a close cooperation with the Destination Southwest Jutland now and in the future. In targets 5, 6 and 8 of the plan it is mentioned that tourism experiences and the development of tourism experiences should happen in close cooperation with local tourism operators and Destination Southwest Jutland.

The fourth layer is the Region of South Jutland (regional political / administrative level). A number of initiatives at regional level support tourism development – directly or indirectly. Tourism and experiences are focus areas in the regional development plan. At this level, the regional tourism marketing / development organisation can be found. This regional tourism organisation (RTO) is called Syddansk Turisme (South Danish Tourism). However, this organisation is subject to change, but it is uncertain what role it will play in the future. It seems plausible that this organisation will disappear as developments at the political scene point towards more focus on the destination level in the future. But this is uncertain.

At the fifth level Visit Denmark can be found. Visit Denmark is the national tourism organisation (NTO). Since a 2010 Visit Denmark is obligated to market Denmark towards foreign markets. Before July 2010 Visit Denmark was also responsible for development activities of Danish tourism. This task is now placed somewhere between the municipalities and the regions. It still remains to be seen, who has the money and capacity to carry out this development task in the future. A qualified guess would be the municipalities, mainly because they are the authorities responsible for planning. This is no longer a task for the regions as it used to be before 1 January 2007.

Denmark is not a member of UNWTO, but has a number of other cooperations internationally. Especially between the Nordic countries there is a strong cooperation in a number of fields – also in tourism.

4.3 Structure of tourism organisation in the Dutch Wadden Sea region

The Dutch part of the Wadden Sea consists of three provinces: Noord-Holland, Friesland and Groningen. In terms of tourism marketing it means that the Wadden Sea region is not promoted as a destination as such. Every province is basically working with a different marketing organisation. These marketing organisations are not marketing the entire Wadden Sea, they mainly promote their own parts of the Wadden Sea. In the same way the various municipalities cooperate with local tourism organisations, in the Dutch setting mostly connected to the various Wadden islands. The mainland Wadden Sea coast is not (yet?!) enough seen as a destination as such and as a result is not (yet) enough promoted as such.

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