

Photo: Andreas Falk. Beach on Langeoog.

Wadden Sea Quality Status Report

Tourism

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United Nations Educational, Scientific and Cultural Organization

The Wadden Sea World Heritage Site since 2009

WADDEN SEA WORLD HERITAGE

Common Wadden Sea Secretariat

1. Introduction

The Wadden Sea Heritage Region is one of the most popular tourism destinations in Northern Europe. Tourism at the coastline of the World Heritage Destination is a highly developed economic sector and a major pillar for this foremost rural region. Revenues created by millions of day and overnight guests per year are contributing to economic stability as well as the acceptance and support of nature protection in the Wadden Sea World Heritage area. For remote communities, especially on the islands in the Wadden Sea, it is an important economic lifeline.

For the Quality Status Report 2017, the geographical area of measurement for tourism comprised 18 different administrative areas (provinces, districts and municipalities) adjacent to the Wadden Sea World Heritage destination in Denmark, Germany and the Netherlands (see Figure 1). To allow comparability the investigated region stayed unchanged since the previous QSR 2004 and QSR 2009 analyses.

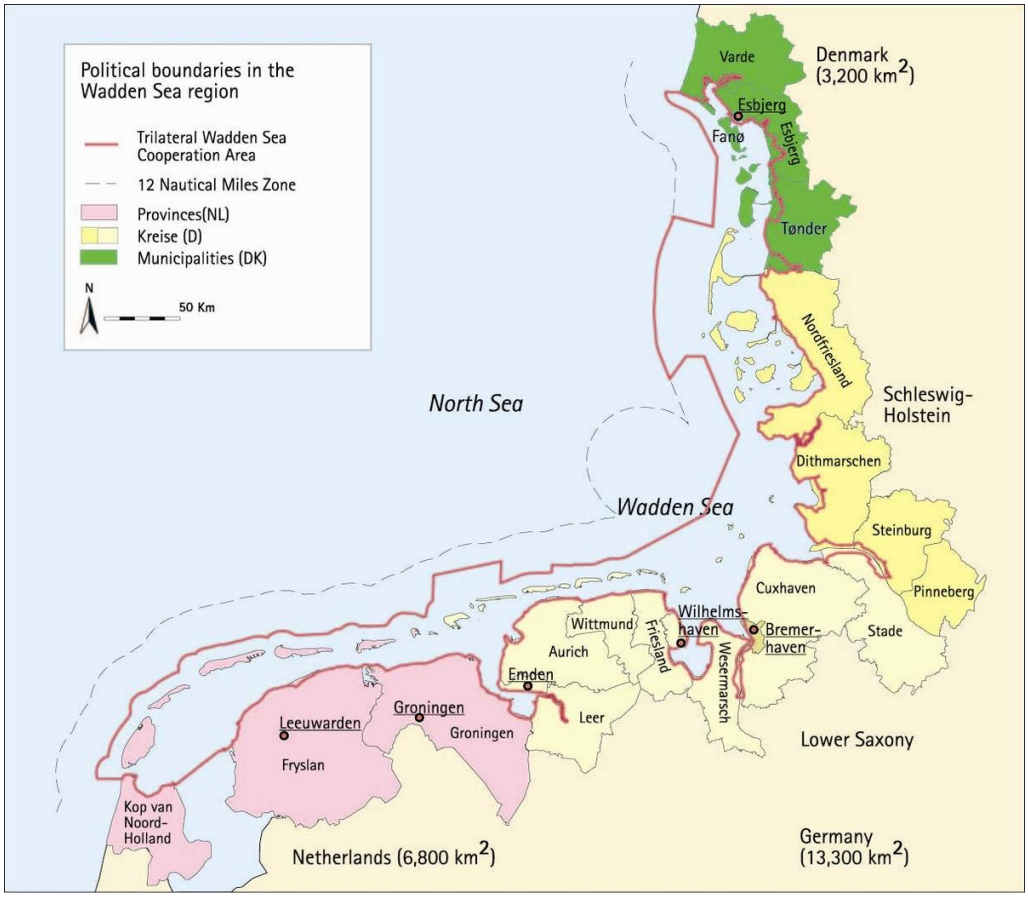


Figure 1. The Wadden Sea World Heritage Destination (World Heritage Tourism Strategy). For this report, the counties of Stade in Lower Saxony and Pinneberg and Steinburg in Schleswig-Holstein are not included because they are not bordering the Wadden Sea coast (Image: CWSS).

Tourism in the Wadden Sea is characterised by holiday tourism. Small scale, privately owned accommodation businesses, holiday homes as well as camping make an important share of the total market. In addition to overnight tourism, day tourism,

primarily by domestic guests, is an important factor for the destinations.

In the Danish Wadden Sea region, foreign tourists account for almost 70 % of the total number of overnights, dominated by German visitors who account for 62 % of all overnight stays while most other foreign tourists come from the Netherlands, Norway and Sweden. Foreign tourists play a considerably less role in both the German and Dutch Wadden Sea regions. Thus, less than 4 % of all registered overnight stays in the German Wadden Sea region are undertaken by foreign tourists. Similarly, tourism in the Dutch Wadden Sea region is dominated by domestic tourists. Only some of the islands like Texel and Ameland are registering more than 30 % of the overnight stays being undertaken by foreign tourists, mainly Germans.

The organization of tourism in the Wadden Sea Region is different in each country and consists of organisations at various administrative levels. Local tourism marketing organizations are in interaction with superordinate, regional and national structures. Tasks and competencies of the organizations at the same level differ from country to country and often even overlap within a country.

Perhaps the Danish Wadden Sea Region has the most clear-cut organisation of tourism of the three countries. Thus, the region comprises of four municipalities, each with its own local tourism organisations (LTOs). Together, the four local tourism organisations constitute the Board of Directors of the Destination South West Jutland, matching the defined area of the Danish Wadden Sea region. The four municipalities are also members of the recently established Westcoast Partnership Organisation under the Danish Coastal and Nature Tourism.

2. Status and trends

Collection of tourism statistics in the Wadden Sea World Heritage Destination

Collecting and measuring tourism data for the Wadden Sea World Heritage Destination is a challenging task. Due to the different administrative regulations and laws in the three neighbouring countries, transnational statistics on tourism, even for basic figures like the number of overnights, lack a common, uniform data basis. Although Eurostat has developed a methodological manual for tourism statistics, it only forms a framework for the individual national statistics offices (NSOs) and leaves them with some degree of flexibility in setting up national systems of tourism statistics. For instance, the Eurostat guidelines (European Commission: Regulation (EU) No 692/2011 of 6 July 2011 concerning European statistics) stipulates that the scope of observation for ‘hotels and similar accommodation’ and for ‘holiday and other short-stay accommodation’ shall at least include all tourist accommodation establishments having ten or more bed places. However, while the German national statistics authorities collect information on a regular basis of overnight stays from all establishments with ten bed places or more, the Danish National Statistical Office in the regular statistics only includes accommodation establishments with at least 40 bed spaces. Similarly, only camping sites with at least 75 units are included in the statistics. Smaller establishments are only included in a sample survey every 4th year.

Hence, it is difficult to make comparisons between the countries. At the same time, Germany, and possibly also the Netherlands are characterized by a large number of small accommodation establishments with less than nine bed spaces, arguably accounting for up to 80 % of all overnight stays in some rural regions of the Wadden

Sea World Heritage Destination. However, in the Danish Wadden Sea region, the Danish National Statistics Office only estimate that the smaller establishments, not included in the regular statistics, account for 5 % of the total number of overnight stays.

Size of existing tourism in the Wadden Sea

The Wadden Sea World Heritage Destination recorded nearly 53 million overnight stays in 2013 (see Table 1). The Dutch region recorded almost 24 million overnight stays, accounting for 45 % of the total, closely followed by the German region, recording about 23 million overnight stays, 43.3 % of the total. The Danish region recorded 6.2 million overnight stays, accounting for 11.7 % % of the total. However, the volumes of recorded overnight stays do not include overnights in smaller accommodation establishment and overnights spent in private accommodation. Arguably, therefore, the volume could be the double as is surveyed in some of the regions.

Domestic tourists account for the bulk of the total number of overnight stays, particularly in the German region with more than 95 %, and the Dutch region with more than 80 %. Only in the Danish region do foreign tourists account for the majority of the overnight stays with about two thirds (68.5 %).

Table 1. Overview of existing tourism in the Wadden Sea.

Tourism Related Parameter	Denmark[4]	Schleswig-Holstein[1]	Lower Saxony[2]	Nether-lands[3]	Total[3]
Visitor arrivals (million)		1.7	3.0	4.4	
Overnight stays (million nights)	6.5	9.1[1,2]	13.8[1]	23.8	53.2
Average length of stay (nights)		5.3	4.6	4-4.5	
Foreign visitors in %	68.5%	3.8%	3.1%	17%	3-68%
Day visits (million)		12.8	32.3		
Bed capacity	34 200	83 300[3]	109 500	144 650	371 650
Bed capacity utilization	25%	35.3%	37.1%	25-48%	25-48%
Daily spending (commercial operations) in EUR	75	96	87	40-100	40-100
Tourism revenue – overnight tourists	451	1 500	1 100		
Tourism revenue – day visitors	164	346	927		
Total tourism revenue in EUR million	640	1 846	2 027	2 176	6 689
Tourism employment	5 100	9 655	4 906	38 293	57 954

[1] Different basis: "Grey accommodation market" not included.

Acc. to data of *Mehrwert plus* (IMT, 2014, Hrsg. Nordsee-Tourismus-Service GmbH) : 18.7 million overnights, including the "grey accommodation market"

[2] Different basis: Including indirect employment

[3] Doesn´t include "Grey accommodation" Note: Germany: *until 2011: accommodations with 9 and more beds, since 2012: accommodations with 10 and more beds*

[4] VisitDenmark, The Economic Importance of Tourism in Destination South West Jutland, July 2014

The average length of stay varies between 4 and 5.5 days in the German and Dutch regions, while it is not measured in Denmark. Generally, information about the

number of day visitors is not measured in any of the three countries but based on estimations and periodic sample surveys. Thus, recent studies of day visits in the German Wadden Sea region estimate that there were more than 45 million day trips to the coastal destinations of Lower Saxony and Schleswig-Holstein in 2012, generating a turnover of approximately EUR 1.3 billion.

The total bed capacity in commercial operations in the overall Wadden Sea World Heritage Destination is recorded at more than 370,000 bed spaces. Of these, the German region accounts for 52 % with almost 193,000 beds followed by the Dutch region accounting for 39 % with almost 145,000 bed spaces. The Danish region offers 34,200 bed spaces, accounting for less than 10 % of the total commercial bed capacity. However, the Danish bed capacity does not include the approximately 94,500 bed spaces available in about 13,700 holiday homes (with an average of 6.9 bed spaces).

The total revenue generated from tourism in the Wadden Sea Destination is estimated at EUR 6.7 billion, an expression of the economic importance of tourism for the. The German region accounts for the bulk of the tourism earnings with EUR 3.9 billion, or about 58 % of the total earnings. The Dutch region generated EUR 2.2 billion, corresponding to 32.5 % of the overall total while tourism in the Danish region generated EUR 640 million, or about 10 % of the total. The average daily spending is estimated at EUR 75 in the Danish Wadden Sea region and at EUR 87-96 in the German region, while it varies between EUR 40-100 in the Dutch region.

At the same time, tourism in the overall Wadden Sea Region is estimated to generate about 58,000 full-time jobs, corresponding to 6.3 % of the Region's total employment. Of this, the Dutch region accounts for about 66 %, while the German region accounts for 25 % and the Danish region for about 9 %.

Monitoring of tourism activities (tidal flat and recreational boating)

The number of guided tidal flat walking tours is an indicator on how many visitors experience and impact on the Wadden Sea Region. In Schleswig-Holstein, the number of guided tours as well as the number of participants (1999 – 2014) show no clear trends and varies around 5,000 tours and 115,000 participants annually (around 20 – 25 persons per tour). In the Netherlands, a limit has been set at 50,500 annual participants. Since 2006, the number of participants was recorded around 25,000 per year, which is less than the years before (up to 32,000). Tidal flat walking tours are not monitored in Denmark.

There are no ongoing monitoring mechanisms in place on recreational boating, and no monitoring is ongoing in neither the Danish nor the German Wadden Sea regions. Recreational boating in the Netherlands (recorded as the number of sluice passages during 1996-2015) has also decreased since 2009 from around 120,000 to around 90,000 in the last years.

Thus, there are no compatible monitoring measurements of tourism activities in place for the entire Wadden Sea Region though long-term monitoring and assessment are necessary in relation to monitoring the impacts of tourism on biodiversity and the environment. Therefore, it is recommended that the three countries identify which monitoring means can be put in place in all three countries as part of the TMAP with a view to ensuring appropriate and compatible monitoring of tourism activities in the entire Wadden Sea Region.

Tourism development since QSR 2004 and 2009

Providing an overview of tourism development in the Wadden Sea Region since QSR 2004 and 2009 is challenging due to changes in methods and administrative areas of measurement. Therefore, some figures have been estimated to give an indication of the development (see Table 2). For the first time since the inscription of the Wadden Sea on the World Heritage List, the QSR 2016 has compiled and assessed tourism data for the entire Wadden Sea World Heritage Destination, as defined in the tourism strategy. This covers the property itself and adjacent areas on the islands and the mainland, as defined as the Wadden Sea Region (= Wadden Sea World Heritage Destination).

More than nine million visitor arrivals are recorded in the Region, generating more than 53 million overnight stays. At the same time, sporadic information about the number of day visitors indicates that the region generates some 40-60 million day visits. Due to the different data sources in the three countries, and changes in statistical methods, an overall trend cannot be identified. The economic importance of tourism for the Wadden Sea region and the three individual regions has steadily increased since the QSR 2004 and QSR 2009. Thus, the estimated total revenue generated by tourism in the region increased from EUR 5.7 billion in QSR 2009 to EUR 6.7 billion in QSR 2016, corresponding to an increase of about 17 %. Tourism in the Wadden Sea Region supported about 58,000 full-time jobs, corresponding to 6.3 % of the Region's total employment. The Dutch region accounts for about 66 % of the total, the German region for 25% and the Danish region for 9 %.

Denmark and the Danish Wadden Sea region in particular has experienced record volumes and values of tourism in 2014 and 2015, where 6.5 million overnight stays were recorded in the four Wadden Sea municipalities. This is 9 % more than the 5.9 million in 2013. The total number of overnight stays in the Danish region was reported at 6.6 million in the QSR 2009 for 2007, due to different administrative areas of measurement, and therefore, not directly comparable with the current overnights of 6.5 million.

The Wadden Sea Region is a major holiday destination in Germany. In 2014, more than 2.8 million trips to the region were recorded, lasting five days or more, and about 5.8 million people were interested in a trip to the region in the next three years (FUR, 2015). Both figures were on the same level in the years before.

The Dutch Wadden Sea islands make a popular holiday destination. Over half of all Dutch people have visited at least one of the islands, mostly on family holidays, and the proportion of repeat visits is high. The number of nights spent on the islands by Dutch tourists has remained almost constant during 2009-2014, while German overnights have decreased drastically by 40 % from 1.7 million nights in year 2000 to 1.0 million in 2009. However, the islands of Texel and Ameland still receive a large number of German visitors.

Table 2. Overview of tourism related parameters available for QSR 2004, 2009, 1st 2016.

Tourism Related Parameter	Denmark[4]			Germany						The Netherlands			Total		
				Schleswig-Holstein			Lower Saxony								
	QSR 2004	QSR 2009	QSR 2017	QSR 2004	QSR 2009	QSR 2017	QSR 2004	QSR 2009	QSR 2017	QSR 2004	QSR 2009	QSR 2017	QSR 2004	QSR 2009	QSR 2017
Visitor arrivals (million)					1.9	1.7		1.9	3.0		4.8	4.4			
Overnight stays (million nights)	4.7	6.6	6.5	15.8	15.7	9.1[1,2]	30.3	13.4[1]	13.8[1]	13.3[5]		23.8	64.1		53.2
Average length of stay (nights)				8.5	7	5.3	7.8	7.2	4.6		5.4	4-4.5			
Foreign visitors in %		88% in holiday homes	68.5%		0.5-2%	3.8%		1.1%	3.1%		27.5%	17%			3-68%
Day visits (million)					12.5	12.8		32.5	32.3		63.1				
Bed capacity	70 000		34 200		76 000[3]	83 300[3]		116 000	109 500	100 000	264 000	144 650			371 650
Bed capacity utilization		33.1%	25%		31-35%	35.3%		33.2%	37.1%			25-48%			25-48%
Daily spending (commercial operations) EUR		54	75		73	96		67	87		39	40-100			40-100
Tourism revenue – overnight tourists		358	451		1 150	1 500		1 555	1 100		530			3 593	
Tourism revenue – day visitors			164		414	346		825	927		884				
Total tourism revenue (EUR million)	267	358	640		1 564	1 846	588	2 380	2 027	586	1 414	2 176		5 716	6 689
Tourism employment		3 500	5 100			9 655		40 383[2]	4 906		38 138	38 293			57 954
Grey accommodation (million nights)	3.4														

1 Different basis: "Grey accommodation market" not included.
Acc. to data of Mehrwert plus (IMT, 2014, Hrsg. Nordsee-Tourismus-Service GmbH) : 18.7 million overnights, including the "grey accommodation market"
2 Different basis: Including indirect employment
3 Doesn´t include "Grey accommodation" Note: Germany: until 2011: accommodations with 9 and more beds, since 2012: accommodations with 10 and more beds
4 VisitDenmark, The Economic Importance of Tourism in Destination South West Jutland, July 2014
5 Excluding data from the mainland areas of the Dutch Wadden Sea region

3. Assessment

Effects of the World Heritage inscription on tourism

In general, the World Heritage status of natural areas can contribute to sustainable development in many ways. World Heritage sites can be important for economic development by attracting new investments and generating locally-based, environmentally-friendly employment in outdoor recreation and tourism, and in the preservation of natural heritage. Further, the preservation of World Heritage sites facilitates spiritual well-being of local people and visitors, through the strong symbolic and aesthetic dimensions of the natural landscape. The possibility to access and enjoy one's own heritage is an important issue, enabling feelings of attachment and belonging to the place.

In connection to this, UNESCO defines sustainable tourism as "tourism that respects both local people and the traveller, cultural heritage and the environment". Following the request of the World Heritage Committee, the trilateral Task Group Sustainable Tourism Strategy consisting of tourism and nature conservation stakeholders developed a Sustainable Tourism Strategy for the Wadden Sea Region with a common vision statement containing four strategic objectives:

1. To ensure all stakeholders have a transnational understanding and appreciation of the values of the Wadden Sea World Heritage property.
2. To ensure stakeholders have responsibility for and contribute to the protection of the 'Outstanding Universal Value' through involvement in tourism management and product development.
3. To ensure the tourism sector provides consistent communication and marketing, and promotes the high quality tourism offers of the Wadden Sea World Heritage Destination.
4. To ensure nature conservation, tourism and local communities benefit from the World Heritage status.

This strategy offers the chance to use the high demand on nature based tourism and nature experience for the economic benefit of the region without endangering its Outstanding Universal Value. Thus, the World Heritage status of the Wadden Sea has

the potential for affecting tourism development in the Wadden Sea Region positively in respect of increasing visitor numbers and tourism revenue. Similarly, the awareness of the World Heritage status both among tourism stakeholders and visitors has increased substantially since the QSR 2009. This confirms that the inscription of the Wadden Sea on the World Heritage List has the potential to increase visitor numbers but not automatically does so without additional marketing efforts.

There is no doubt that the World Heritage status can be even further exploited in the development and marketing of tourism in the Wadden Sea Region through focused use of the heritage brand in the marketing and promotion of tourism, and through the engagement of the tourism sector and visitors in the protection of its Outstanding Universal Value of the Wadden Sea. The implementation of the strategy on "Sustainable Tourism in the Wadden Sea World Heritage" has laid the foundation to ensure that tourism development and nature conservation will mutually benefit. Raising awareness about the natural values of the Wadden Sea, also among tourism stakeholders, may contribute towards increasing the number of visitors to the region and contribute to an emotional attachment to the protected area and public support for the conservation programmes.

4. Recommendations

Overall, the recommendations for the improvement of the collection and dissemination of tourism statistics information in the Wadden Sea Region include:

- Integrate in the existing research being undertaken in the region the conduct of regular transnational visitor surveys covering the entire Wadden Sea, where visitors are questioned about the importance of the World Heritage status and the Wadden Sea in general for the visitor experience. The visitor survey does not need to be conducted every year, since the travel patterns do not change rapidly. Therefore, the surveys could be conducted every 3rd or 4th year;
- Conduct regular cross-national surveys of the local tourism industry and the local population, where tourism-related SMEs and the local population are questioned about their awareness about and pride in the World Heritage status and the Wadden Sea in general as well as the potential utilisation of these aspects in their marketing and promotion. The survey is recommended to be conducted every 3rd-4th year;
- Conduct systematic cross national visitor expenditure surveys, where both day visitors and overnight tourists are questioned about their expenditure patterns while visiting the Wadden Sea region. The surveys should be undertaken regularly every 3rd year and may be undertaken as separate surveys or as part of the above proposed visitor survey investigating the importance of the World Heritage status. The methodology to monitor regional economic effects of protected areas recently published by the Bundesamt für Naturschutz (BfN) (Job et. Al., 2016) might serve as an example for the entire Wadden Sea Region;
- Implement a joint cross national initiative between educational centres and student research to ensure that the same aspects and issues are investigated across borders to enable easy comparison of the research and its use in future QSRs – as well as by those who really use the data.

While tourism in the Wadden Sea Region is already of great importance for the regional and local economies, there is a need to ensure that tourism activities respect the environmental and conservation requirements to retain the Wadden Sea's rich ecological value and biodiversity and its Outstanding Universal Value (as outlined in

the tourism strategy). This report indicates that there is a need to revisit which tourism activities to monitor, and how to assess their respective impacts, and the methodologies of monitoring, e.g. as part of the Trilateral Monitoring and Assessment Programme (TMAP). The social-economic monitoring in the Wadden Sea of Schleswig-Holstein (SÖM) might serve as an example how this can be done in a comparable (coherent) manner in the entire Wadden Sea World Heritage site. In this connection, measuring the marina capacity could also be considered.

5. Summary

The Wadden Sea World Heritage Destination is one of the most popular tourism destinations in Northern Europe, and tourism is a major economic pillar for this rural region. While foreign tourists account for almost 70 % of all overnights in the Danish Wadden Sea region, they account for less than 4 % in the German Wadden Sea region and about 20 % in the Dutch region. Due to different administrative regulations and laws in the three neighbouring countries, transnational statistics on tourism lack a common, uniform data basis, although Eurostat has developed methodological guidelines.

Overall, the Destination recorded almost 53 million overnight stays in 2013, of which 24 million in the Dutch, 23 million in the German, and 6.2 million in the Danish regions. However, when including overnight stays in smaller accommodation establishment and private accommodation, the volume could be considerably higher. Domestic tourists account for the bulk of the overnight stays, particularly in the German region (95 %), and the Dutch region (80 %). Only in the Danish region do foreign tourists account for the majority of overnight stays with 68.5 %. The average length of stay varies between 4 and 5.5 days in the German and Dutch regions and is not measured in Denmark. More than nine million visitor arrivals are recorded in the Wadden Sea Region, generating more than 53 million overnight stays. Further, sporadic information about the number of day visitors indicates that the region generates some 40-60 million day visits.

The total tourism revenue in the Wadden Sea World Heritage Destination is estimated at EUR 6.7 billion, of which EUR 3.9 billion (58 %) in the German region, EUR 2.2 billion (32.5 %) in the Dutch region and EUR 640 million (10 %) in the Danish region. Average daily spending varied between EUR 75 in the Danish region, EUR 87-96 in the German regions and EUR 40-100 in the Dutch region. The economic importance of tourism for the overall World Heritage Destination and the three individual regions has steadily increased since the QSR 2004 and QSR 2009, and is now estimated at EUR 6.7 billion, an increase of 17% since the QSR 2009. Tourism supports about 58,000 full-time jobs, corresponding to 6.3 % of the Region's total employment, the Dutch region accounting for 66 %, the German region for 25 % and the Danish region for about 9 % of the total. The World Heritage status of the Wadden Sea has the potential for affecting tourism development in the Region positively in respect of increasing visitor numbers and tourism revenue.

Recommendations for improving the collection and dissemination of tourism statistics in the Region include:

1. Integrate regular transnational visitor surveys in the existing research being undertaken in the region;
2. Conduct regular cross-national surveys of the local tourism industry and the local population;
3. Conduct systematic cross national visitor expenditure surveys;

4. Implement a joint cross national initiative on revising the QSR report agenda on tourism between educational centres, students and stakeholders using the data;
5. Identify and implement the best ways to monitor the impact of tourism activities.

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