

Nature Tourism Route around the North Sea Region



Interreg Vb, North Sea Region Prowad Link Project

Nature Tourism Route around the North Sea Region

Responsibility for text and content

The Wadden Sea National Park
www.nationalparkvadehavet.dk
ORANGE elevator
www.orangelevator.com

Layout

Moustens Byro

Frontpage photo

Thomas Høyrup Christensen

Contact

Anne Husum Marboe, Development Manager
The Wadden Sea National Park



Contents

Executive Summary	5
Foreword	7
What you are about to read	7
The Concept of a Route.....	9
Definition of a route	9
Vision, aim, ambition and goals	10
Core product and services.....	12
Partners and advisers.....	12
Organisation.....	13
Market Potential.....	15
Data analysis and procurement.....	15
Is there a demand for transnational routes with a focus on outstanding nature sites?.....	15
Is there a demand for different thematic routes?.....	18
Ways of connecting stories to a route, such as culture, history, gastronomy, architecture, heritage.	18
Who are the customers/tourists?.....	19
What is the market volume?	20
Is the market attractive?.....	20
Other similar routes.....	21
Geography – Presentation of Locations.....	23
Draft route location – which areas should/could be included?	23
Which nature sites that fulfil the outstanding value criteria would be natural to include?.....	26
Proximity to towns, attractions and markets	28
Psychological perception of physical accessibility and physical infrastructure.....	29
Combining local route with bigger route.....	29
Local backup and connections to local visitor attractions, tourism and leisure offers.....	29
Physical infrastructure.....	31
Environment and Society.....	33
Nature and environment – how are nature and landscape influenced by establishing a route?.....	34
Socio- and local culture.	36
Economic cost/benefits for local communities: turn-under, job creation, tax revenues.	37
Economics.....	39
Which partners could be linked to the route?.....	39
How to involve local partners in route development?	39
Estimated economy for the next phase of a route (if demand is documented)	40
Estimated overall rough budget for construction costs.....	40
Proposals for funding construction.....	41
Reflections on running costs.....	41
Summary of recommendations.....	43



Photo Ulrik Pedersen

Executive Summary

The feasibility study presents the case for adopting a responsible tourism approach to developing a new route. This report highlights the practicality of developing a route as part of the Inter-reg project *Prowad Link* and focuses on the ethical concerns as well as the managerial steps needed to develop this product.

The Prowad Link is part of a much larger and more important mission than creating a tourism product for the visitor economy. The 17 Sustainable Development Goals (SDGs) of the UN's 2030 Agenda for Sustainable Development are considered crucial to developing a tourism route in a sensible manner. Because the study focuses on the practical feasibility of such a development, a specific transnational route is proposed. The report argues for the feasibility of a particular part of the Prowad Link along the Wadden Sea, *The Wadden Sea Heritage Trail*. ORANGE Elevator (OE) has conceptualised and proposed an alternative route.

The proposal holds an inherent opportunity to integrate environmental and social ambitions from day one. The study concludes that a demand for transnational routes exists and that route concepts can alleviate pressure during the high season while catering to more visitors at off-peak times. The proposed *Wadden Sea Heritage Trail* aims at better distributing existing tourism. The ambition of becoming the first route developed exclusively to promote the spring and autumn tourist seasons and to select sustainable locations is a fundamental element of the route DNA. Areas that have reached carrying capacity should be excluded from the route, and nudging is suggested as an important on-site tool for steering visitors away from fragile environments.

The Prowad Link and *The Wadden Sea Heritage Trail* depend on broad collaboration between a number of actors. This collaboration is key to establishing a route that is socially sustainable as well as financially viable. The report asks us to invite more specialists to join the project, as it is imperative that the partners' collaborate with traditional nature experts about proficient nature preservation and include local actors as co-creators of initial development and authentic experiences on-site. Bottom-up, locally embedded processes attract great support from local communities as well as important know-how. These managerial approaches can ensure the sustainable development of the natural and socio-cultural environments along the route.

The report argues for the feasibility of developing a route anchored in the Wadden Sea area as the Wadden Sea is already a well-established brand in Germany and Denmark. It is also

internationally recognised by UNESCO as a designated World Heritage Site due to the area's great natural and cultural diversity.

This diversity is the unique value proposal, conceptually visualised as charms on a charm bracelet. Points of parity (PoP) and points of difference (PoD) are presented as principal tools for designing differentiated visitor experiences. The brand is being built around the PoDs that drive the unique value proposals. These PODs point up the route's diversity and assure a differentiated appeal just like the charms on a bracelet, which represents a route made up of unique, individual stages. Visitors will experience this diversity when crossing physical borders, sampling different cuisines and exploring the heritage, habitats and distinctive cultures that are significant elements of the attraction.

The Prowad Link is intended as an investment for the future of tourism. The specific end-goal of this long-term investment is outdoor tourism, currently the fastest-growing form of tourism. The value of the proposed route has not been planned from scratch, but ties in with existing tourism trends where being in and using nature are among the most popular types of tourist holiday.

With the increasing focus on nature preservation and values, this development is bound to continue. The route will mainly attract tourists from the "Weekend Warrior" segment, who resemble special interest tourists, but spend more. However, *The Wadden Sea Heritage Trail* is not just one route for one type of tourist, but should be considered a network of routes and stages. The route can additionally be sub-divided into green, orange and red sections catering to different tourist segments and defined by differences in accessibility to services such as accommodation or businesses.

Understanding that the project is a long-term, 10-year investment is crucial. The study highlights three important developmental steps during this decade that will determine the route's success. Step 1 will focus on establishing a specific process and initiating collaboration. Step 2 will concentrate on building the brand, while step 3 addresses the period following the establishment of a common organisation.

The development of the route must focus on generating turnover, and existing businesses that can design attractive products for route visitors will be the first to experience financial growth. However, the route project should create both direct and indirect employment. As more visitors start using the route, new businesses will emerge and the economic benefits will become apparent. Creating new service-oriented, place-specific jobs will add value to the local community and have the potential to lower the youth drain in the surrounding areas.

1 Advisers, national and transnational partners, local commercial stakeholders and NGOs



Photo Ulrik Pedersen

Foreword

This is a feasibility report on work package 6.5 of the Interreg project PROWAD LINK. Work package 6 focuses on developing sustainable tourism and experiences with nature as a driver for development.

The report evaluates the feasibility of a proposed route and the opportunities it would offer, as well as the factors that the ongoing development of such a route needs to take into account. Such factors include the ecological possibilities, potential weaknesses and business opportunities. There is a clear need to connect good business practices and local business partnerships with proficient nature preservation.

The report does not present a full plan for how the route should be built, but initial findings and ideas for how to move forward. It should be noted that building new routes is an ambitious undertaking that needs strong commitment – a half-hearted project is unlikely to succeed.

What you are about to read

The study structure is based on the original project outline and as such provides a clear structure for any questions that need answering.

The project outline is structured as follows. Chapter 1 describes the concept of a route and how to think in terms of a Prowad Link nature route; chapter 2 presents an analysis of market potential; chapter 3 concerns the potential geographic location of a route; chapter 4 addresses environmental and social considerations; and chapter 5 outlines the future economy of the project.

To best demonstrate the project possibilities, this feasibility report includes a suggestion for a route that will be the step-off point for a discussion of the Prowad Link as a practical exercise moving forward. Due to sustainability concerns and other practical considerations, the individual details of this suggestion are subject to change, but the central points remain: it is absolutely imperative that the route follows the Wadden Sea as closely as possible at all times, starting and ending at major hubs. Chapter 3 provides a link to a suggested route.

Data procurement

This report is based on ORANGE Elevator's years of experience in developing tourism destinations and SMEs in the experience economy. The report is also the tangible result of exhaustive desk research as well as face-to-face and Skype meetings at which ORANGE Elevator (OE) interviewed selected partners from the participating countries.



Photo Thomas Høyrup Christensen

The Concept of a Route

Across Europe, tourism is growing². New concepts must address not only how to strengthen and develop this rise, but also how best to manage it and distribute visitors from both Denmark and abroad.

Tourism growth is unevenly distributed along the length of the Prowad Link project, with some places already having reached their carrying capacity While others still have room for more visitors. An ambitiously constructed and well-planned route, divided into easily accessible stages, could help better distribute visitors geographically as well as seasonally.

Definition of a route

Route definitions vary greatly. For example, UNESCO puts a lot of emphasis on the ideological and educational qualities of routes. A route will typically be made up of individual trails and paths that vary in whether they can be travelled on foot, on a cycle or by other means of transport. These routes offer various natural, cultural and commercial experiences. In addition, hubs and centres can be placed to provide a range of loops that visitors and local inhabitants can use over the course of several days. Routes always start from the same point, but never go the same direction. However, no single globally “true” definition of a route exists.

The approach of this feasibility study focuses on practicality. To best protect and use the environment in a sustainable manner, we should aim to distribute tourists in the best possible way. For the purposes of this feasibility study a route is defined as:

A transnational, Wadden Sea-oriented, officially recognised and mapped outline between two points – hubs – along which visitors and local inhabitants can travel on foot or by bike, to experience businesses and attractions along the way, and use the various hubs that denote the endings and beginnings of individual stages.

What kind of route could be developed?

The relevant areas in the participating countries bordering the Wadden Sea are characterised by a strong variety of cultural and natural experiences. This represents an outstanding value. As such, the definition of specific stages, with the route’s attractions, themes and individual trails and paths, should be developed as a multidisciplinary effort between local authorities, residents and visitors.

However, a more general definition of the route to be developed is as follows:

A transnational route along the Wadden Sea and the areas designated as UNESCO World Heritage sites will be defined as stages linking the hubs, towns and cities along the route, with a train station marking the start and end of each individual stage. The route’s variety is its unique value proposition. This type of hub-central thinking has worked very well for similar route projects, as the report will expand further upon in chapter 2.

The route to be developed will have to be designed through bottom-up processes.

While traditional experts and decision-makers will define the strategy for sustainable use as well as the route’s overall direction and connecting points, local actors will have to provide knowledge about local routes, businesses, interests, etc.

Conceptually, the route can be thought of as the bracelet of a charm bracelet: valuable in its own right, but defined by individual charms that represent the individual stages.

The route will have many points along the way from which different stages can be developed as the route evolves. The route will not be a combination route for its full length: in some areas, hikers and cyclists will have to be separated. The details of these sections in the individual stages are to be defined jointly by experts, local stakeholders and decision-makers.

Environmental sustainability is essential

The route to be developed through the participating countries will be defined by environmental sustainability – this being a requirement of the Prowad Link work package – and by responsible social and business practices. The route must lead visitors along the most robust areas possible and always focus on pathways near options for accommodation and shelter, food and services.

² Deutsche Welt - Germany Sees Another Record Year For Tourism <https://www.dw.com/en/germany-sees-another-record-year-for-tourism/a-42503501> & The Guardian - “We must act now” - <https://www.theguardian.com/world/2019/may/06/we-must-act-now-netherlands-tries-to-control-tourism-boom>

This project gives the opportunity to consider and implement the 17 UN³ goals for sustainable development from the outset (see graphics for UNESCO-specific UN goals in chapter 4.). Correct implementation will be key to building a route that enhances environmental protection while making sense in practice.

With a marked route, defined in detail by local actors in cooperation with national project managers, the Prowad Link can nudge the large majority of tourists in the desired direction: away from fragile nature areas and closer to commercial hubs.

The aim of this route is not to increase pressure from new tourists – especially in the high season – but to better distribute the existing market and make it easier for visitors and local residents to use the route. Achieving this aim through nudging, informing, and providing services and businesses to hikers and visitors along the route makes good sense.

Clear marking

A consistent route will be mapped and marked. In the best of all worlds, a new route would be perfectly marked from day one – but in reality, it takes time and development to align signs and markings. In time, it might be possible to adopt a common solution, perhaps inspired by the excellent work done in The Netherlands on long-distance cycling routes⁴. However, from the outset, markings may vary and indeed, may never be truly identical. In order to have a consistent route, at the very least markings will have to be identifiable as sharing the same theme. A route traversing three countries of great natural and cultural diversity will have to use this variety as a strength. Accordingly, the route marking would have to use local partnerships and evaluations to determine the availability of goods, services, accommodation and food options along the individual trails and sections of the route.

Making use of the variety

Differentiated signalling and mapping can be used to highlight the wide variety along the route. For example, maps showing green, orange and red sections of the route could clearly indicate to visitors and organisers the proximity of the route to businesses and accommodation.

- **Green sections** would indicate well-marked, solid infrastructure, close to businesses and towns.
- **Orange sections** would be slightly further away from populated areas, more rugged. Proximity to garbage disposal is still essential.
- **Red sections** would be for seasoned, well-equipped travellers as they will be far from businesses and other supporting infrastructure. These sections signal the message: “Bring your Trangia and lightweight sleeping bags”.

The various sections would appeal to different types of tourists. Red sections might appeal to hardcore special interest tourists, while green ones would attract a wealthier segment, and as such most stages have to be green. This differentiation will be central to communication and marking – it will let route users of the route, both local and visiting tourists, identify the type of experience they want: primitive or luxurious.

An insight from other route mapping projects is the importance of making sure visitors always know where the next garbage disposal site is, as that encourages them to take their garbage with them. Additionally, facilities like access to toilets and electricity are important to most visitors, but ensuring that they are willing to take their garbage with them is important, and a relatively simple approach makes this achievable.

THE ROUTE OVERALL

With the image of the Prowad Link route as a charm bracelet, the hierarchy of the route is as follows:

ROUTE:

This is the overall Prowad Link, from Leeuwarden to Esbjerg, the bracelet.

HUBS:

The places where stages along the route start and end.

STAGES:

The individual stages that make up cycle and hiking paths. Each is made up of localised themes, attractions, etc.

TRAILS AND PATHS:

Individual stage sections.

ATTRACTIONS:

Individual stops, villages, activities, etc., along the way.

Vision, aim, ambition and goals

Vision

The Prowad Link has an ambitious vision: a route of the highest international standards that can give modern, nature-loving visitors sustainable experiences. For sustainability to be at the core, it must be the indispensable first element of the vision. The Prowad Link offers the opportunity for the 17 UN Goals for Sustainable Development to be considered as an essential part of the vision.

Sustainability is key to any long-term endeavour today. This proposed route offers an opportunity to integrate environmental and social ambition from step 1.

³ United Nations - #Envision2030: 17 Goals to transform our world - <https://www.un.org/development/desa/disabilities/envision2030.htm>

⁴ Holland Cycling Routes, Long Distance Cycle Routes - <https://www.hollandcyclingroutes.com/long-distance-cycle-routes>

Aim

The aim is to create a transnational route of the highest standards. The Prowad Link has every chance of achieving this. In most territories that the proposed Prowad Link would traverse, the tourism industry is already stretched and has very little additional capacity, if any – especially in the high season. The vision for a new route in the context of the Wadden Sea is to develop the first route with the aim of promoting the spring and fall seasons.

In practical terms, this can be accomplished by using marketing materials coded only for the spring or fall seasons from April to June and from September to November. Utilising existing available capacity is good practice and the best way to interest businesses.

There is a general reluctance to invest further for fear of creating over-tourism. But a route such as the Prowad Link is an investment in tourism 10 years from now, not for tomorrow. The areas involved will make their living from this investment in 10 years' time. Instead of fearing over-tourism, local areas and businesses should plan ahead and handle the tourism of the future in a manageable and sustainable manner.

Ambition

The potential for a route of the highest international standards that can provide modern, nature-loving visitors with sustainable experiences certainly exists. The natural and cultural resources along the Prowad Link could come together to build something as successful and attractive as the “Camino de Santiago”. As a brand, the route’s name would readily conjure up images in the minds of most consumers. This report’s approach derives from the immense variety in nature and culture across the route, as well as the easy accessibility between hubs and the many reasons to walk the different stages. Across the Prowad Link member countries, this route can offer the greatest variation in nature and culture of any single route. It features the differences of three countries with UNESCO-designated World Heritage sites. It would offer everything from high-end accommodation and gastronomic experiences to extremely primitive nature experiences.

Apart from creating a route whose proximity to local infrastructure will enable businesses and local stakeholders to benefit from route visitors, the ambition should be to make a route focused on protecting and utilising nature across a multitude of cultures. This ambition is indeed within reach: other routes provide inspiration⁵ and proof, and the UNESCO certificate for the World Heritage Site of the Wadden Sea proves that the area’s value is worth protecting and showcasing worldwide.



Goals

In order to achieve the ultimate goal of becoming a successful route with a resourceful organisation behind it, the initial milestones should be:

The short-term goal is to initiate collaboration. Local organisations need to start allocating resources and planning for future collaboration. Experience shows that short-term goals need to be manageable – establish a local structure and make sure someone is responsible for implementing it. On the other hand, the long-term goals should be sufficiently ambitious make the project worthwhile. Perspective is important, and participants need to understand that a

plan like this takes 10 years to get properly underway. The various partners need to align and this takes time. However, the end result will make the effort worthwhile.

The risk is that the grand scale may be daunting. It takes organisational courage to keep aiming for the lofty goals of a truly transnational route. However, it can be done, as routes such as the newly formed EuroVelo 10 route and the successful Berlin-Copenhagen Bike trail demonstrate. No one organisation can achieve this alone, so cooperation is imperative. The upshot is that the result will be the world’s most varied routes, in terms of both natural and cultural experiences.

⁵ See chapter 2

Core product and services

The core product offered by the proposed route stretching along the participating countries is sustainable experiences in nature. Beyond that Prowad Link provides a cohesive combination route along the Wadden Sea with specific themed stages and accessible hubs, designed for use outside the high season – from Leeuwarden in The Netherlands through Germany to Esbjerg in Denmark. Over time this can build a brand with wonderful variation of nature, as proven by the UNESCO, as well as a host of cultures.

UNESCO Wadden Sea Nature Heritage interest sites.⁶



Stevns klint

Ancient and Primeval Beech Forests of the Carpathians and other Regions of Europe

The Wadden Sea

Partners and advisers

Internal conflicts of interests will always exist between partners focused on protection and partners focused on practical use. The partners to include have to represent both sides. Over time, many different actors will end up being involved in this development, including advisers, local commercial partners and NGOs as well as national and transnational partners.

Advisers

In order to secure specialised knowledge across protection, marketing and design, partners need to be included. This group is made up of internal experts, as well as outside help: representatives of UNESCO, marketing and communications specialists.

Local commercial and NGO partners

Along the route partners play an enormous part. They are made up of businesses that are necessary to make sure day-to-day operation of the route is both secure and sustainable. On the other hand, local nature guides and conservational actors are key when specific elements of the stages are designed and for efforts ensuring that the route is not destructive.

National and transnational partners

At the national and transnational levels, partners include cycling and hiking interest organisations, sustainable suppliers of goods and services, etc.

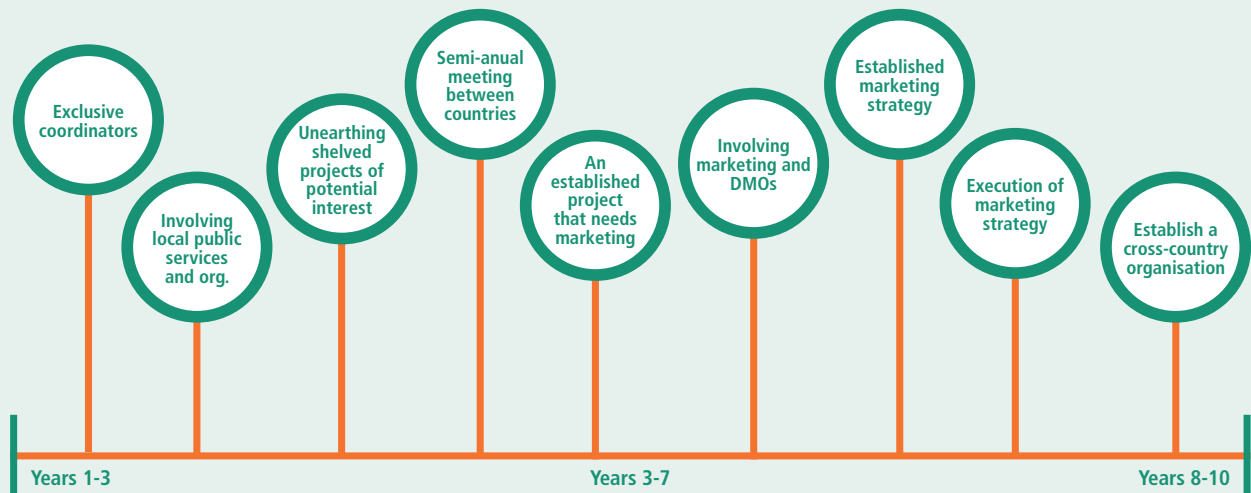
⁶ Wadden Sea Nature Heritage Sites - <https://whc.unesco.org/en/list/>

Organisation

The organisation of making a Prowad Link route a reality will be implemented in steps. The cultural differences across the partners involved are considerable and will have to be aligned over time.

In the project outline, the vision is to create a sustainable route of the highest standard. As such, Prowad Link is an endeavour that will not be fully realised in the short term.

It is a long-term investment in a project that will initially run for the next 10 years. Given the variety of organisations, interests and capabilities across the Prowad Link, the organisation needs to reflect a long-term development process. This development process is divided into three separate steps, each defined by the part of the plan that it realises.



Step one - Years 0-3

At this step, the goal is to move from regular knowledge-sharing to establishing a specific process for developing the route.

Each country has a coordinator, or project manager, working exclusively on coordinating with local authorities as well as on the initial process of setting up international cooperation for further down the line. This coordinator will also be responsible for involving local municipalities and organisations that might have an interest in the route – from mediators such as hiking guides to nature enthusiasts. The manager is also responsible for making sure that any shelved projects that might be a good match with the overall route are to light.

One of these project managers will also function as lead partner and be tasked with overall responsibility for international cooperation. The project managers will stay in touch with each other from day one, and twice a year a representative of each country, along with a leader authorised to make decisions, will meet up and agree on specific issues necessary to advance the project. At this stage, each country will have two actors committed to the development project.

The outcome of the end of step one, will be a specific route that is in place with hubs, stages and paths established. You have a name and a defined vision involving sustainability, a model for partnerships and initial funding secured for the next step.

Step two - Years 4-7

At this step the process will have generated concrete results and an organisation. At this stage it will be beneficial to start involving marketers and Destination Marketing Organisations (DMOs) (. Marketers and DMOs will want to have a process up and running and a solid project to pursue. They would not be interested in participating until this stage.

The meeting frequency is still twice per year. At this stage 14-18 people will be present at the meetings.

At this step, the brand will have been built, proper strategies for communication developed, appropriate communication partners involved across the participating countries and the organisation is involving local businesses.

Step three - Years 8-10

At this step, a common organisation proper exists, founded on protection first, practical use second. The purpose of this organisation is to ensure sustainability as well as marketing, product development, coordination, cross-selling and financing through funding, donations and public support.

At this point the results of the work will also be clear in the form of a better distribution of tourists and better average expenditure, giving municipalities a much greater incentive to invest.



Photo Ulrik Pedersen

Market Potential

Market potential is just as much about available capacity as it is about how many tourists or local inhabitants are willing to use any given route or service.

In Germany and The Netherlands current pressure from tourism is already putting strain on some areas, and a route would have to focus more on distributing tourism better, for example, towards greater capacity areas and away from fragile nature areas, than on growing the market.

As already mentioned, this distribution is as much temporal as it is geographical. Businesses and Destinations are interested in more off-season visitors while pressure during the high season needs to be alleviated.

Data analysis and procurement

This feasibility study is based on available knowledge on tourism, as well as input from partners across Denmark, Germany, The Netherlands and Britain. OE has spoken with representatives from all of these countries to ensure the best understanding of the four partners' needs and capabilities.

A large part of data was collected from sources indicated by the partners during the conversations. OE has since examined additional data based on past experiences, and references have been sourced from the available material.

Limitations of desk research

Over recent years, active tourism has been recognised as a powerful category worthy of its own data sets. However, occasional blind spots arise when data is gathered. For example, some data does not consider car tourists who travel with their bikes strapped onto their vehicles as cycling tourists. Nonetheless, they very much the focus of this report.

Most available numbers are based first and foremost on accommodation, but local consumers use many services that are not accommodation and as such only figure secondarily in the data.

Is there a demand for transnational routes with a focus on outstanding nature sites?

Tourism is growing globally⁷. According to the UNWTO (World Tourism Organisation)⁸, international tourism has grown globally by 6% from 2017 to 2018,. This amounts to 1.4 billion arrivals worldwide. Domestic tourism in the EU totalled 876 million trips in 2015 according to the EU⁹.

In The Netherlands international tourism grew by 13% from 2016 to 2017¹⁰ and by a further 11% between 2017 and 2018¹¹. From 2017 to 2018¹² international tourism in Germany grew by 5% and domestic tourism by 4%. Denmark saw a 3.4% growth from 2017 to 2018. Outdoor tourism is by far the biggest single contributor¹³. Germany and The Netherlands primarily have domestic tourism, with more than 90% of tourism in Germany being domestic. However, the growing international demand suggests these countries will experience an increase in international tourists that will generate tourist income, which is classified as export value.

7 VisitDenmark 2019, Turismen i Danmark - <https://www.visitdenmark.dk/api/drupal/sites/visitdenmark.com/files/2019-05/Turismen%20i%20Danmark%202019.pdf> - P.3.

8 UNWTO, 2019 - International Tourist Arrivals Reach 1.4 billion Two Years Ahead of Forecasts <https://www2.unwto.org/press-release/2019-01-21/international-tourist-arrivals-reach-14-billion-two-years-ahead-forecasts>

9 European Tourism Trends 2018, p 35, <https://ec.europa.eu/docsroom/documents/29101/attachments/1/translations/en/renditions/native>

10 Statistics Netherlands (CBS), 2018 - <https://www.cbs.nl/en-gb/news/2018/14/tourism-sees-fastest-growth-in-over-ten-years>

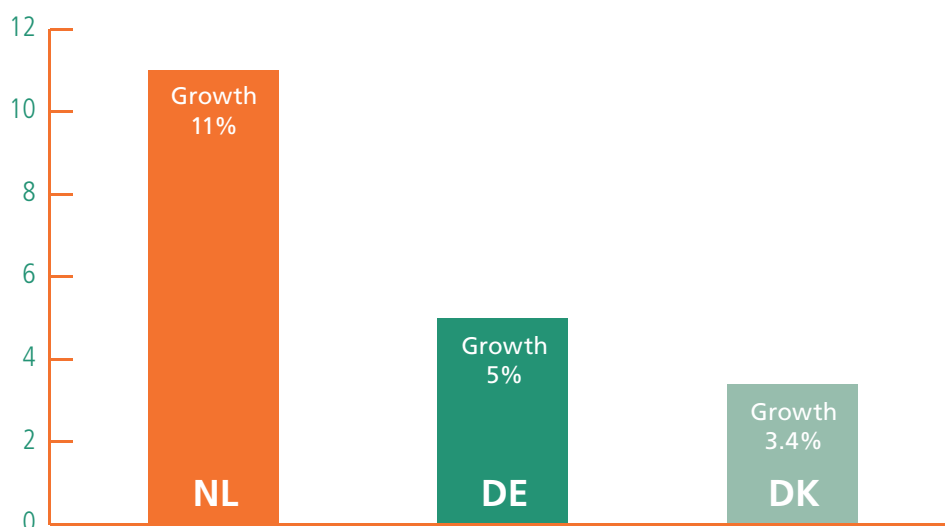
11 Netherlands Times, 2018 - <https://nltimes.nl/2018/01/22/foreign-tourism-netherlands-rises-11-percent-eu13-billion-spent>

12 Tourism Review, 2019, "Germany: Tourism boom with 9th record year in a row" <https://www.tourism-review.com/germany-rejoices-over-continual-tourism-boom-news1094>

13 VisitDenmark, 2019: "Turismen i Danmark" <https://www.visitdenmark.dk/api/drupal/sites/visitdenmark.com/files/2019-05/Turismen%20i%20Danmark%202019.pdf> p. 4 & p. 6

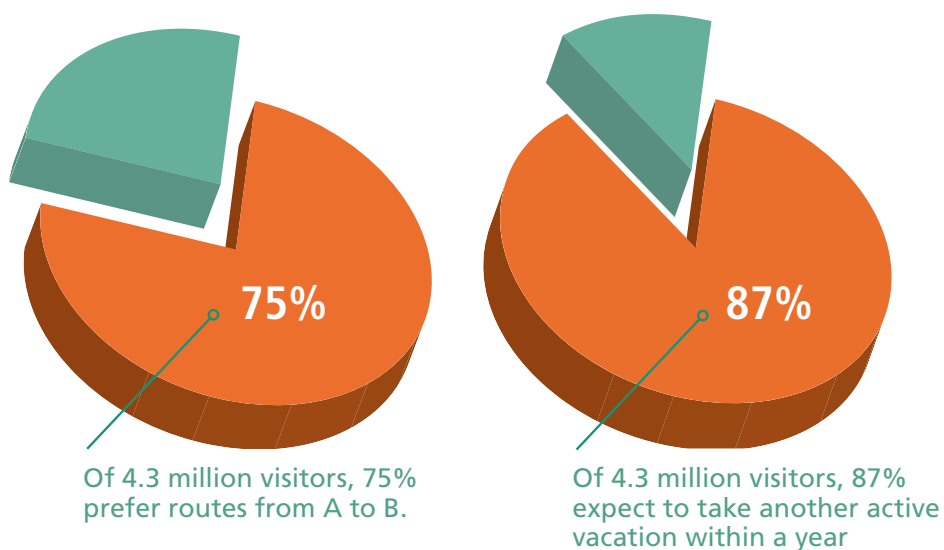
International Tourism

Growth in international visitors 2017 - 2018



% Global growth 6% - matching 6% in Western Europe.
Netherlands: 11% from EUR 15.7 million to EUR 17.6 million
Germany: 5% from EUR 453.8 million to EUR 477.6 million
Denmark: 3.4% from EUR 26.7 million to EUR 27.6 million

The potential for cycling tourism alone is immense: the Allgemeiner Deutscher Fahrrad-Club (ADFC) found that that out of 4.3 million German cycling tourists in 2017, 75% preferred to travel routes from point A to point B, and a full 87% of these tourists are looking to go on cycling holidays again within the year.¹⁴



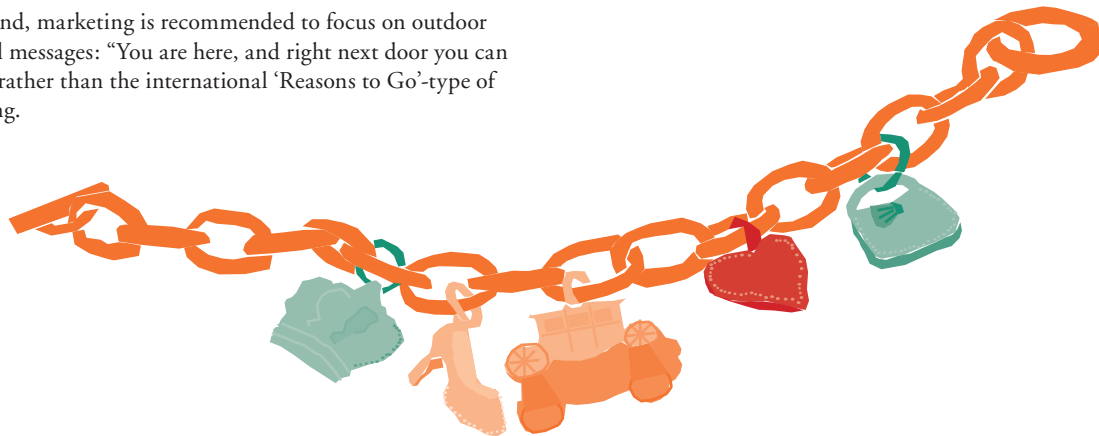
14 ADFC-Travelbike-Radreiseanalyse 2018 og 2019 - www.adfc.de/artikel/adfc-radreisenanalyse - 2019

Domestic tourism is rising, with a focus on sustainability due to the rising awareness of climate change and personal consumption. Both internationally and domestically, nature is the most favoured “Reason to Go”: “*Stueve et al. (2002) estimated that natural areas, and their closely associated local cultures, and the various related tourist, recreational and leisure activities, contribute around half the total economic activity attributable to the travel and tourism sector.*”¹⁵ Tourists demand routes with excellent natural and cultural experiences, and a route like the Prowad Link could do much to make sure that tourism growth is better distributed throughout the year. The UNESCO sites, the natural qualities and cultural differences are all in line with providing an outstanding experience in nature.

Target tourism

This route is about building the kind of tourism desired 10 years from now and about developing tourism for the common good through the long-term, sustainable distribution of visitors. The route is not an exercise in attracting more tourists tomorrow. Building a solid product, great partnerships, a sustainable approach and an overall route worth developing for both local stakeholders and transnational partners alike is the means to achieving this in the long run. This is also why the Prowad Link will be as interested in local interests as it is in visitors. Selling the product to domestic tourists and the local population is as important as selling it to international visitors.

To this end, marketing is recommended to focus on outdoor and local messages: “You are here, and right next door you can find X,” rather than the international ‘Reasons to Go’-type of marketing.



The route as a charm bracelet with themed charms.

Usage

Few visitors will make use of the route in its entirety from Leeuwarden in The Netherlands to Esbjerg in Denmark, but the large, cohesive brand of one single route will be a strong selling point and, in time, cross-selling across stages with similar themes will be possible. In other words, if tourists or local residents like the theme of a particular stage of the route, they can go elsewhere to experience similar themes. It will be a strong “Reason to Come Back” as well as a “Reason to Stay Longer”.

Various themed stages

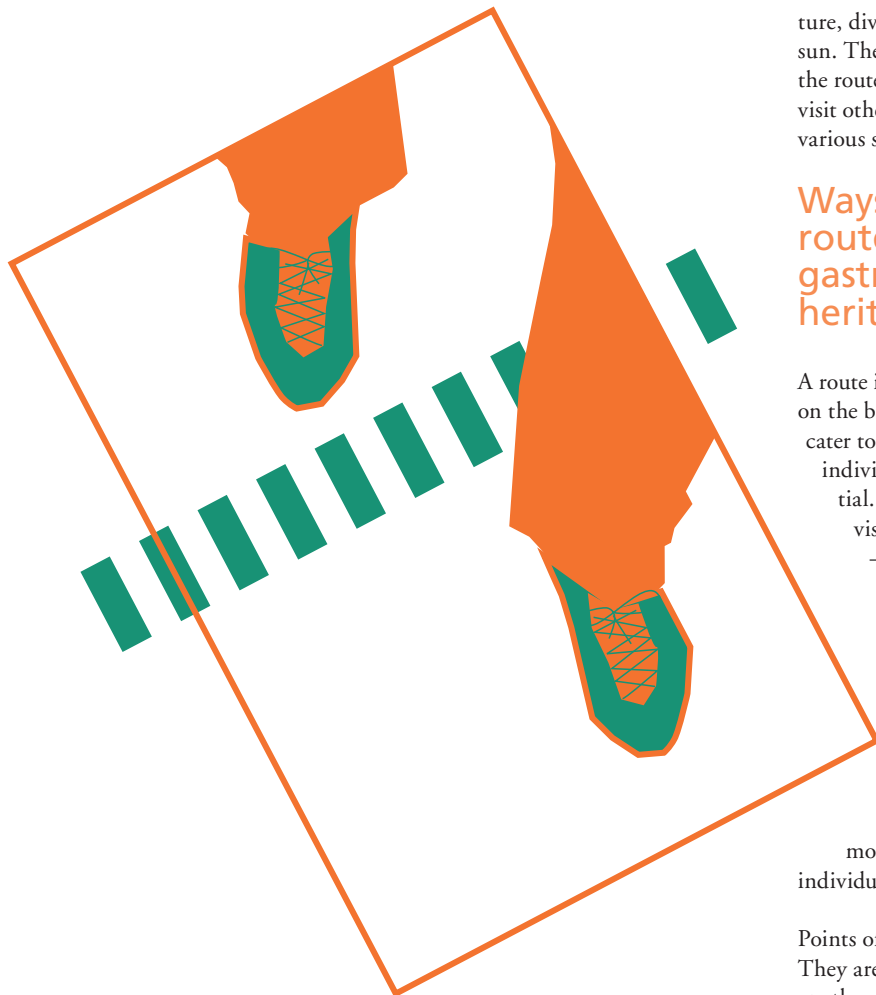
The Wadden Sea area offers huge variety, and the route can therefore be illustrated as a charm bracelet, where the entire brand is the bracelet, but the individual stages and their hubs are themed charms. This links with future marketing where cross-selling becomes easier: “If you liked this theme of authors along the coast of The Netherlands, please explore [this] stage in Germany and [this] stage in Denmark, where you can experience something similar.”

The themes can be anything from authors and gastronomic experiences or outdoor activities to the many varying types of nature. The main thing to remember is that the themes are organic – developed through bottom-up cooperation with local interests. However, the central brand, the bracelet, will ensure recognisability, and security. If any place is part of this route, the ambition and services will be of high quality within their genre and always communicated clearly for what they are.

15 Outdoor Recreation and Nature Tourism (Simon Bell et al.) 2007 - <https://www.imba-europe.org/sites/default/files/EU%20perspective%20on%20outdoor%20recreation%20and%20nature%20tourism.pdf>, p.18

International transitions

As the route offers transnational border crossings these must be clearly marked and communicated as they are important parts of the brand. There is value in finding that you can walk this trail and cross borders. On top of this comes the spirit of adventure – crossing borders on foot rather than while sleeping on a plane.



Here, emphasis can be placed on the various differences in how tourists perceive destinations. For example, Germans informally recognise the high degree of freedom in Denmark, with its easy-going beaches and public beer-drinking culture, while Danes enjoy the environmental protection and practical culture of Germany.

Is there a demand for different thematic routes?

Nature is a strong driver of tourism and has been since the turn of the millennium at least. The reason may well be rooted in a fear of loss rather than nostalgia for the past, but nature is still the single biggest interest for both local and international tourism¹⁶.

Nature tourism is increasing six times faster than tourism overall¹⁷.

Nature isn't everything, though. The value of a long, thematic route is variety: nature is a strong part of the value, but variety is key, and themes must come from bottom-up development and local engagement. The incredible variety of experiences and attractions across the route give the brand its value. They can be as diverse as gardens, wartime, churches, castles, literature, diving spots, UNESCO sites and everything else under sun. The variety of offers is the reason to keep moving along the route, and in time, similar themes will be a good reason to visit other parts of the route. This diversity will also ensure that various stages appeal to different market segments.

Ways of connecting stories to a route, such as culture, history, gastronomy, architecture, heritage.

A route is the sum total of its individual stories. Like charms on the bracelet, stories and themes are help draw visitors in and cater to what they want to experience. Connecting stories to individual stages of the route and across its entirety is essential. An easy way to design a differentiated experience for visitors is to think about what singles out a given product – consider its so-called points of parity and points of difference.

When thinking about points of parity and points of difference, we tend to focus on points of parity. These are the basics that make up a specific service for a route. For example: How good is the accommodation, what dining options and nature stops are available, etc. However, we have no way of having real, direct control over most of these factors – they are, for the most part, up to individual businesses and local organisations.

Points of difference, however, are where the brand is built. They are the unique value proposals. And these differences are the connected stories/themes. They add to the variety and assure differentiated appeal. The more stories of culture, history, gastronomy, heritage a the route can tell, the better. These stories have to come from the local people who live or have their livelihood along the individual stages of the route. If they are not involved in developing the themes and instead feel as though they have been handed a story or theme they cannot recognise, they are unlikely to feel uninclined to get involved – yet the route needs them.

At the organisational level it is important to communicate the right stories and themes in order to attract the right types of visitors at the right spots. Tourists need something to look forward to that corresponds to the physical reality at the site, and that pricing, products and services must be in line with their expectations.

16 Outdoor Recreation and Nature Tourism (Simon Bell et al.) 2007

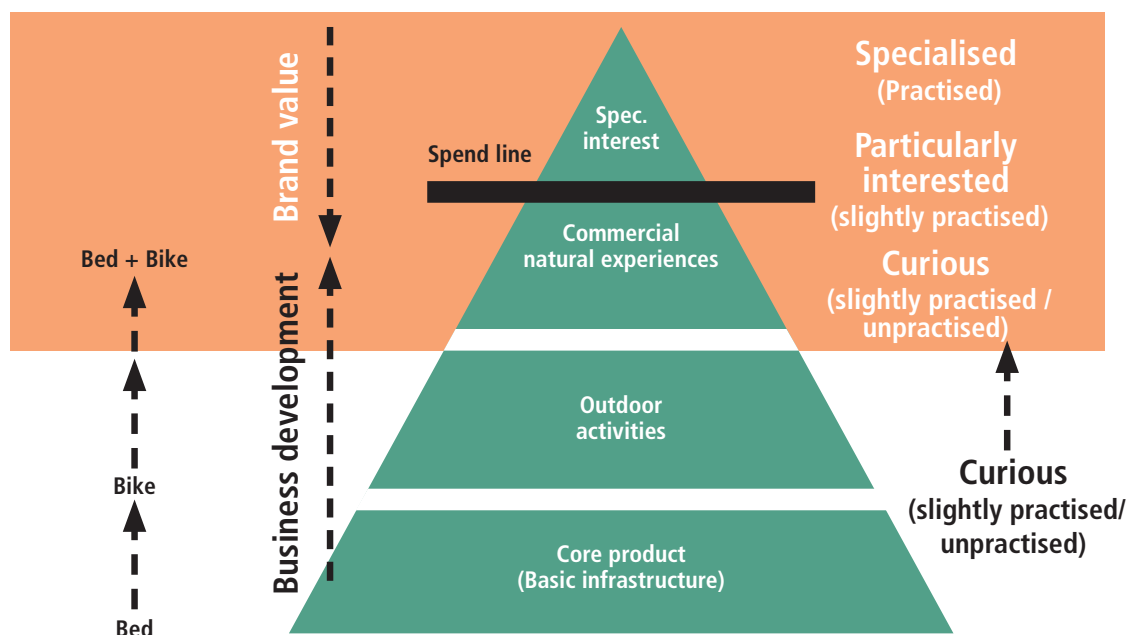
17 UNWTO - World Tourism Highlights 2018, <https://www.e-unwto.org/doi/pdf/10.18111/9789284419876>

Who are the customers/tourists?

Their motivation, expectations, needs and demands now and in the near future.

With a route this diverse, the customer types are highly varied, according to their preferred theme – or bracelet charm. The age of the easily understood, stereotypical consumer is past, and even within cycling or hiking, the segments differ wildly, with some cyclists demanding high-quality accommodation and others requesting far more primitive and authentic nature experiences.

Growth in nature tourism (bike example)



Source: InterReg Deutschland - Danmark

Model of recipients of increasingly specialised messages, from communicating basic infrastructure (bottom) to speaking in highly specialised lingo to extreme SITs. Note that brand value comes from the most specialised SITs, but they do not spend a lot during their stay.

Who are the customers?

What we know about this type of customer is that they belong to the “Weekend Warrior” segment of interest. They resemble special interest tourists (SITs) – but only to a certain degree. True hardcore SITs spend little; they usually pack their gear beforehand and want to go so far off the beaten path that nudging is difficult. However, less hardcore tourists who try to emulate them want far more goods and services – and they are more likely to go places recommended by others.

More than anything, what visitors want from their trip is to get “the inside scoop” – meeting local residents in an authentic way. They want to know more about the area they have passed through or stayed in so they can embellish their stories with exciting details once back home. The sharing economy is the perfect example of a direct response to the demands of these

types of consumers¹⁸, who are not “just” tourists, but travellers; a notion that to a greater extent relates to immersion in local culture.

Creating experiences from the bottom up allows us to ensure that valuable insights from “Meeting the Locals” are integrated sustainably. Local residents have been considered co-creators that aid the design-making process, for example, when it comes to site-specific stories about their particular local area. This is where stories about local quirks, local history and local insights can be told.

18 J. Andres Coca-Stefaniak et al., 2017 - Living Like a Local: Authentic Tourism Experiences and the Sharing Economy - https://www.researchgate.net/publication/317411466_Living_Like_a_Local_Authentic_Tourism_Experiences_and_the_Sharing_Economy

Often, when people have a good experience, they are more open to different perspectives and other experiences than those they might usually pursue. Sometimes the 5-star hotel guest will want to go off the beaten path to try something more rugged, if for no other reason than to satisfy their own fear of missing out. While in this exploration mode, however, they need to meet authenticity (read more behind this argument on p. 18 regarding consumer trends).

What is the market volume?

Tourism is certainly growing and experiences in nature are in increasingly high demand. Tourism data suffers from the fact that areas devise key numbers based on varying interests.

Market volume is largely defined by capacity. If visitors have nowhere to pay for services, goods or just to donate, any amount of volume will merely be a drain on local resources in terms of garbage and general wear and tear on the natural environment.

This report assesses that, with the right business opportunities, the right services, inspired funding campaigns and so on, the best can be made of visitors' daily expenditure and the market volume will prove to be there. This is clear in examples such as Jurassic Coast, a series of connecting paths in England whose organisers have designed a solid crowd-sourced funding model. Customers are requested to leave donations, through easy, non-taxed means such as in cash or through money transfer apps.

Efforts must be made for Prowad Link to make the most of providing visitors with hubs full of services and offerings, catering to their needs. Nature experiences, attractions, individual themes and businesses along the stages are reasons to go, and large hubs guarantee available capacity at all times. Businesses are necessary along the stages because they help with maintenance and trash removal as long as it makes business sense for them to do so. Ensuring this is a means to securing sustainable tourism.

Focusing on off-season visitors further helps in using infrastructure and capacity already available with minimal initial investments.

Is the market attractive?

Target groups

The market for nature routes is attractive. It is made up of domestic tourists first and short-haul vacation tourists as well as Northern European tourists. For sustainability purposes, Prowad Link is primarily aimed at distributing visitors geographically and temporally. Developing an industry that is already bursting at the seams is not the primary focus. As such, the target groups are:

1. **Local users:** Trends indicate that local people will make use of the route - and to chip in with shaping the individual stages of the route. It is important to speak with local organisations, school services, local history museums, nature guides, etc. – groups that can influence and help develop the project
2. **Short-haul vacation tourists who are already visiting.** The Prowad Link route will have to offer additional opportunities to tourists already in the area and give them reasons to come back and reasons to stay longer. As such, the interesting short-haul vacation tourists are the ones already checked into beach hotels, holiday homes or even just taking a one-day trip.
3. **Domestic and transnational Northern European tourists.** The type of tourists that will travel across a single border or two for a hike in nature tend to take shorter trips.

Trends and responses

Conversations with partners and desk research throw light on the current trends in tourism. The primary driver of active tourism is nature but several other connected trends and interests motivate modern tourists of today, domestic as well as international. The trends they care about are their own culture; their own history; the climate, which affects both manner of travel and modes of consumption; proximity to nature and togetherness. They respond well to closeness and authenticity¹⁹.

Market Channels

Prowad Link will mainly address target groups through localised out-of-home campaigns, word of mouth from local inhabitants and businesses and local advertisements in relevant places. Digitally distributed ads will also be used, aiming at groups defined by age, location, interests sorted by themes and specific offerings available at the various stages.

19 Diane Dredge & Szilvia Gyimothy - The collaborative economy and tourism: Critical perspectives, questionable claims and silenced voices - <https://www.tandfonline.com/doi/abs/10.1080/02508281.2015.1086076> (s. 12)

Other similar routes

The following describes lessons learnt from leading routes. For detailed information on these routes, please refer to Addendum A of the report.

Organised by private agencies – Der Donau Radweg

Der Donau Radweg (The Danube Cycle Route) is a route developed to make use of the growth in cycling tourism. Germany welcomed 4.3 million cycling tourists in 2018 alone, up from 4 million the year before. Based on travelling alongside “Der Schönen blauen Donau,” the route packages consist of various stages along the scenic route from Germany and across an additional nine countries.²⁰

The Danube Cycle Route requires that visitors are mobile, but not necessarily exceptionally fit, since the route is generally flat. With the advent of electrical bicycles, the requirement for completing the route has lowered and made it accessible to an even broader market.

The Danube Cycle Route is driven by three private agencies that package and sell trips along the route: Radweg Reisen, Donau Reisen and Trauni’s Reisen. They present the partners and providers along the route in digital catalogues and ensure that the partners are aligned with the route’s values and goals. The information provided is heavily weighted towards purchase and defined by the market. Visitors are approached as customers, and the most relevant information, like maps with directions, is given when they buy a route from one of the agencies.

However, the route is well-marked, and tourists can easily follow it without having to buy a ready-made product from one of the actors. For example, the largest partner has no English version of its website. The Danube Cycle Route partners are presented in an integrated online catalogue with booking options. Exposure is mostly through out-of-home campaigns and online advertising.

Engaging finance model – Jurassic Coast

The Jurassic Coast is 155-km stretch of the south-west coast of England. It is meant to be explored by foot, but because the rapid growth in cycling tourism has shifted the focus include the many paths accessible to cyclists. It is centred around a series of hubs from which loops emanate and as such Jurassic Coast is not a single route to travel or a linear challenge to overcome but rather a series of areas to experience.

The Jurassic Coast path is part of a larger national trail – the South West Coast Path. This means signage is consistent throughout the route, with the entire Jurassic Coast waymarked with signs and clearly marked paths to keep visitors on track. Sometimes a sign is the simple image of an acorn, as the oak tree is the national symbol of the UK, or signs that say South West Coast Path²¹. Visitors can download maps of the many connected trails from the website²². The maps are free of charge, but visitors are encouraged to make a small donation as a contribution to the development of new routes.

The Jurassic Coast financing model started as a public development project involving the sustainable development of the Dorset and East Devon Coast World Heritage Site. Now, Jurassic Coast receives income made through donations and grants, with additional revenue generated through paid partnerships with local businesses, who in turn receive promotion. Partnerships are graded from level 1 to 3, paying increasing costs but also receiving additional exposure and promotion. The scheme provides financing for the Jurassic Coast while providing a strong platform for local SMEs who thus enjoy the benefits of a common platform and a common voice. Besides helping to sustain the World Heritage Site and thereby enhancing the site as a whole, the donors in the business partner scheme gain great benefits by being part of the network.

Municipally managed routes – N8

The Danish part of the transnational EuroVelo 10, named the N8 or “Østersørutten”, is an 820-km cycling route that loops into a giant figure of eight across the southern parts of Denmark, with Svendborg at the centre of the figure. Through Southern Jutland it is connected to the European Bike Network. In March of this year, the route acquired international fame, winning the Cycling Route of the Year Award 2019.

The route is operated and backed by 17 different municipalities as well as multiple public and private actors²³. The only marketing is an online interactive map with hubs and services.

The design, a figure 8 on its side, makes the N8 route flexible, and tourists of varying cycling proficiency can enjoy a trip along its course. The route’s diverse aspects are further underlined by the stage along the coast of Funen, which received the UCI Bike Label in 2017 for its commitment to cycling at all levels²⁴. Part of the route takes cyclists across bodies of water on ferries and bridges. The route quality varies from area to area, but all its stages score high in user satisfaction and usability, despite the many different operators.

Municipalities bear the main burden of maintaining the route, which includes garbage disposal and route marking. However, many SMEs are collaborating in a Danish-German network called “Bike Friends”, which certifies participation levels. At minimum they agree to allow cyclists to use their restrooms and fill their drinking bottles on the way²⁵, but some have taken the initiative to establish ‘bike stations’, miniature repair stations with the tools needed to repair and maintain a bicycle on the road.

20 <https://www.donau-radweg.info>
21 <https://www.southwestcoastpath.org.uk/>
22 <https://jurassiccoast.org>

23 Dansk Kyst- og Naturturisme, VisitDenmark, Dansk Cykelturisme, Vejdirektoratet, Destination Fyn, Destination Lillebælt, Business Lolland-Falster, Visit Vestsjælland, Visit Sydsjælland-Møn, Destination Sønderjylland, and Naturturisme I/S
24 <https://www.uci.org/cycling-for-all/bike-city-label/fyn>
25 <https://www.naturturisme.dk/1362-cykelturisme.html>

The transnational route – Berlin-Copenhagen

Opening in 2001 after a design process that began in 1996, the Berlin-Copenhagen Bicycle Route has enjoyed a steady flow of users travelling along its path. Although most users only cycled individual stages, around 7,000 completed a full trip from Berlin to Copenhagen and vice-versa in 2014 alone. Those 7,000 visitors generated an estimated 30,000 overnight stays and 90,000 meals sold, while the visits also directed users to see various attractions along the way.

The route is divided into three stages: one in Denmark, one in Mecklenburg and one in Brandenburg. Each stage is then split into smaller stretches ranging from 26 km to 70 km, with multiple UNESCO sites along the way. Owing to increasing numbers of electric bikes, the route accommodates this objective by providing charging stations at 40-km intervals along the route.

Although the route invites potential visitors to do the full trip – hence the name Berlin-Copenhagen – it is also marketed as a route where visitors can just jump on, complete one of the three stages and visit some of the panoramic route. Tourists are not obliged to do the full tour, which is estimated to take 11-12 days.

The Berlin-Copenhagen Bicycle Route exemplifies the transnational opportunities for cooperation, allowing visitors to rent a bike in Berlin at Fahrradstation and return it in Copenhagen at MTB Tours or vice-versa. Many more enterprises have entered into public partnerships along the route and received their Bed+Bike certifications to attract cycling tourists.

Cooperative marketing – Kattegattleden

Kattegattleden is a 395-km cycling route with stages marked by hubs capable of accommodating the steady stream of visitors. The route opened in 2015 and is the first national cycling route in Sweden. The route has already garnered international praise and awards, taking home the Cycle Route of the Year in Europe 2018 at the European Cycling and Hiking Fairs in The Netherlands. The route is managed by the regions of Halland and Skåne, the Swedish Transport Administration and the local municipalities. It started as a public project but local businesses have since also taken an active interest.

The route consists of eight connected stages from city to city, with no loops. Instead, it is a linear stretch from Helsingborg in the south to Gothenburg in the north. It starts or ends right by the transport terminuses in the two cities, so it is easy to get to the route by train or bus. Kattegattleden has its own signage system which is consistent throughout the route: the signs are dusty-red, the name “Kattegattleden” is written in white and signs show an arrow with the number “1”.

The route has an official website²⁶, giving tourists the impression of an organic and coherent experience waiting for them in Sweden. It also gives local stakeholders, which include restaurants, hotel owners and tour organisers a common voice.

One of the early core marketing strategies was to develop a strong website. A year after the route opened, the focus moved beyond Sweden, with international press trips and collaboration with travel bloggers raising global awareness.

Geography

– Presentation of Locations

Draft route location – which areas should/could be included?

This feasibility report includes a proposed route and concept. The concept is based on the EuroVelo 12 cycle route, with numerous modifications – introducing the use of the individual hubs and stages to bringing the route close to the coast and ensure visitors are always near the water.

The proposed route is designed to follow the Wadden Sea as closely as possible in terms of geography and brand. It should be borne in mind that this is a proposal and as such will have to be worked on to ensure the stages are correct in every detail. Some stages might be changed to accommodate cyclists and hikers differently and some might be shortened or lengthened.

The central point is that stages begin and end at major hubs with access to public transport, as inspired by the successful

routes highlighted above. The proposed route will hereafter be referred to as the “Wadden Sea Heritage Trail”, to distinguish it from the general concept of a Prowad Link route.

Wadden Sea Heritage Trail - A proposal for an alternative route-product

This section proposes a possible route. The route is based on the idea that it must offer a distinct reason to go, followed by a strong brand. To maintain the balance between protect and prosper, a certain infrastructure is needed to absorb the increasing number of visitors who want to explore the unique outdoors, whether biking or hiking. The route is founded on the EuroVelo 12, but optimises placement, prioritises commercial accessibility and adds a hub-based approach. Hubs make individual parts of the route easier to brand and enable diverse themes appropriate to local stakeholders.

Proposed route for a branded Wadden Sea Heritage Trail



Links:

Part 1 of proposed route: <https://drive.google.com/open?id=1moWHsBnhfHXvKYOdUfUw2ouweJbCKn4G&usp=sharing>

Part 2 of proposed route: <https://drive.google.com/open?id=1U1FhJZzQJtujKcdDGSRzdUrXCEKZEd0B&usp=sharing>

Nature Tourism Route around the North Sea Region

The alternative route focuses on the stretch from Leeuwarden in The Netherlands through Germany and to Esbjerg in Denmark. Naturally, the route can be expanded in future, but three countries are suggested as a starting point for getting the project up and running. England and Norway have particularly strong hiking traditions. However, including England and Norway will lead to some practical challenges in creating an interesting route product. For this reason, they are not part of the first proposed version.

The basic concept

The Wadden Sea is a strong brand, has outstanding nature and attracts a huge number of visitors. These strengths make it a far more promising as a concept and central pillar than the Prowad Link, whose route is often located far away from water on less interesting roads and has no common voice or common denominator. The alternative route runs along the ocean, offering visitors a beautiful and varied route where each kilometre is packed with great experiences based on scenic natural surroundings.

The coastal areas of the North Sea attract many visitors during the summer. The German cities in particular are fully utilized in many of the warmer months. This means that many German coastline hotels have booking rates of around 90% for the year, a rate significantly higher than the norm for the coasts of Denmark and The Netherlands. Due to the high booking

rates in Germany, guests staying only one or two nights are less popular for these establishments, who would have guests who stay longer.

For a new route product to make sense, the entire concept has to be developed with a focus on visitors in spring as well as in autumn. The product DNA must consider all aspects associated with the product. A fully developed route concept with good infrastructure will naturally also help summer visitors, but to make a truly positive, optimal contribution, the route project must focus fully on April-May as well as on September-October.

The islands are not included in the route, since tourism on islands in Germany, The Netherlands and Denmark has reached a level more visitors could have a negative effect. It would be possible to make local loops out onto the islands, but the conclusion, based on research and conversations, is that creating a stronger mainland economy would be more beneficial.

An appealing name

A good story is everything, and the product proposed needs a good name. Prowad Link, EuroVelo 12, and the North Sea Cycle Route are poor names for products that should conjure up certain associations and images in visitors' minds. The names are generic and have no site-specific quality. By far the strongest selling point of such a route is that UNESCO has hailed the Wadden Sea as a remarkable nature site.




Photo Thomas Høyrup Christensen

This report proposes using the storytelling title “The Wadden Sea Heritage Trail”, as it tells a story and is much easier to communicate. Over time, the route can be extended to incorporate more stages across more countries, such as stretches in England and Norway, making “The Wadden Sea Heritage Trail” part of a larger trail. In this case, the name will no longer reflect the entire route, as parts will no longer be along the Wadden Sea. The first part of the name establishes the route’s site-specific and unique elements.

The name “Wadden Sea” is a good name for a brand. It’s different from most other route names, and some people may find it difficult to pronounce. It denotes an authenticity and uniqueness that underpin a strong nature brand. “Heritage” implies the sense of something special and old, which translates to a place the visitors need to take care of and experience with respect. “Trail” is to be preferred over “route”, since it creates a feeling of being closer to and more in contact with nature.

Hiking and cycling

Prowad Link is a combined route where cyclists and hikers use the same roads. This is an advantage for future wayfinding work, including sign posting, marking, maps etc. However, since the EuroVelo 12 is mostly a cycle route, hikers will experience a route with little or no “off-road hiking”. Naturally, hikers prefer routes without asphalt and smaller, narrower trails. Part of the Wadden Sea Heritage Trail is also a combined route but smaller trails close to the sea will allow hikers to be nearer the ocean, walk on narrower paths and so on. When a route pro-

duct has become established and become popular, the option of leading traffic to more places opens up. Cyclists can be confined to more established roads and paths, while hikers get a more “off-road” experience.

Stages

Possibly the best-known route in Europe is El Camino. The route’s full title is El Camino de Santiago de Compostela, but the name “The Camino”²⁷ has turned it into a single giant brand. The Camino is often referred to as *one* route, when it is actually a network of routes and stages. Attracting millions of visitors every year, the routes have experienced a particular increase in demand from international tourists over the past 10 years²⁸.

The Camino is over 800 km long and creates enormous pressure on local accommodation options. Therefore, the typical visitor only walks around 20 km a day to get to an available bed. Many visitors are not physically able to walk the 40+ days the route takes to complete or cannot get the time off from work to walk the entire route in one go. Hikers have to return several times if they want to walk the full 800+ km.

27 El Camino de Santiago overview - www.santiago-compostela.net/routes

28 Vive el Camino - <https://vivecamino.com/en/the-evolution-of-the-camino-de-santiago-in-numbers-no-502/>



The Wadden Sea Heritage Trail is a similarly long stretch. It is therefore important to divide the route in natural stages. This will give the visitors the option of visiting part of the route and returning a year or two later to experience more. It will create some natural breaks for physical and mental relief, as many of the best routes in the world do.

Target groups

The target groups for a Northern European route product will change over time.

Initially, the typical target groups would be local visitors and domestic visitors from the region. Many of these visitors will be using the infrastructure while spending none or only a few nights along the route. However, as awareness increases and the route becomes better developed more visitors will arrive from further afield. Route products take time to develop, and demand is gradually created.

Route products revolving on cycling and hiking can easily create associations of visitors living in tents and cooking rather primitive food on campfires. These target groups also use long routes, but most of the target groups are different.

Many people in Northern Europe have a primary summer vacation lasting two or three weeks. Besides this, many want to go on shorter vacations with a few overnight stays and can afford to do so.. Over the last many years, city breaks have become a popular vacation element, , but the trend is shifting towards a demand for active experiences in nature with few or no overnight stays.

The Wadden Sea Heritage Trail is perfect for short vacations. Its location within a few hours' transport from millions of potential visitors makes it easy and cheap to use the attractions on the route. While the data basis is still fairly scant, many people are focusing increasingly on limiting their air transport. For example, the Swedes have implemented a new term, "Fly Skam"²⁹. This trend will boost a new and interesting Northern European route product.

Couples without children, small groups and friends are some of the major SIT target groups. The increase in electric bikes sales is ensuring that older people can experience nature from a bike saddle, even though they have to ride 20-40 kilometres a day.

Which nature sites that fulfil the outstanding value criteria would be natural to include?

The Wadden Sea Heritage Trail has the potential to become a success. In 10 years' time, it will be a large part of how the involved areas attract and distribute visitors. For this reason, it is more important to deselect locations and sites than to select.

It is important to note that the Wadden Sea Heritage Trail should lead visitors away from the vulnerable nature in the area. A number of vacation towns along the coast are uninterested in an increase in visitors – especially in Germany. It is a good idea to cull these locations from the project from the beginning.

A successful route will tempt visitors away from the overcrowded islands and locations with vulnerable nature towards areas interested in welcoming them.

Locations must be selected according to the bottom-up principle. From the outset, dialogue must involve local businesses, public and private actors, NGOs, mayoral staff, etc. This would be the correct way to develop the local areas of the Prowad Link.

Experience with numerous projects involving nature, trails, tourism, food products, etc., shows clearly that local actors are powerful experts who know their own areas and villages intimately. Any higher up – at municipal or regional levels – the route risks losing the very thing customers really want: uniqueness.

In accordance with the recommendations that the route should be built up over a broad timeline and not as a big short-term project, the bottom-up approach makes sense. Small-scale local projects with knowledge-sharing during the first years will be both cheaper and more effective as a development model. Any given area or village might have a range of interesting poets or a specific type of cheese – this knowledge can only be found for sure local actors are involved.

A search of the desk drawers of local municipalities, DMOs, national park organisations and NGOs, etc., will most likely reveal a plethora of plans for local projects. In all probability, these drawers will conceal old projects, large and small, that never went anywhere, but are perfect for activation – fully or in part – in connection with the route.

By culling non-sustainable locations and areas from the outset and selecting partners afterwards, the Prowad Link creates a sustainable, local project that promises long-term success. It will enable a tone of voice focused on strengths rather than on presenting various weaknesses in nature. This is not to say that communication on the fragility of nature and importance of sustainability is not allowed – it simply allows the main focus to be on communicating the strengths of the locations we want people to visit. The selected areas and local initiatives taken will also comply better with the UN Goals for Sustainability.

During our research, the partners who have provided insight have described their countries' primary strengths and areas of focus:



Photo Ulrik Pedersen

Proximity to towns, attractions and markets

The winner of Cycle Route of The Year 2018 is Kattegattleden³⁰, located on the Swedish west coast. The award marks international acclaim for the first national cycling route in Sweden, further promotes the area surrounding it and shows that sufficient quality can achieve solid marketing outside national borders.

The route provides solid inspiration for working with cycling and hiking, as it helps secure cycling tourism business for enterprises and towns along the route. In order to create maximum turnaround, the route is described as being made up of eight stages between towns, hubs that will specifically attract tourists who will spend money there. Some stages along the route are relatively short, some as short as 20 kilometres, while others are long, around 70 kilometres. By clearly communicating the distances, the route allows for a natural transition, despite the fact that visitors will walk 20 kilometres on some days and 70 on others.

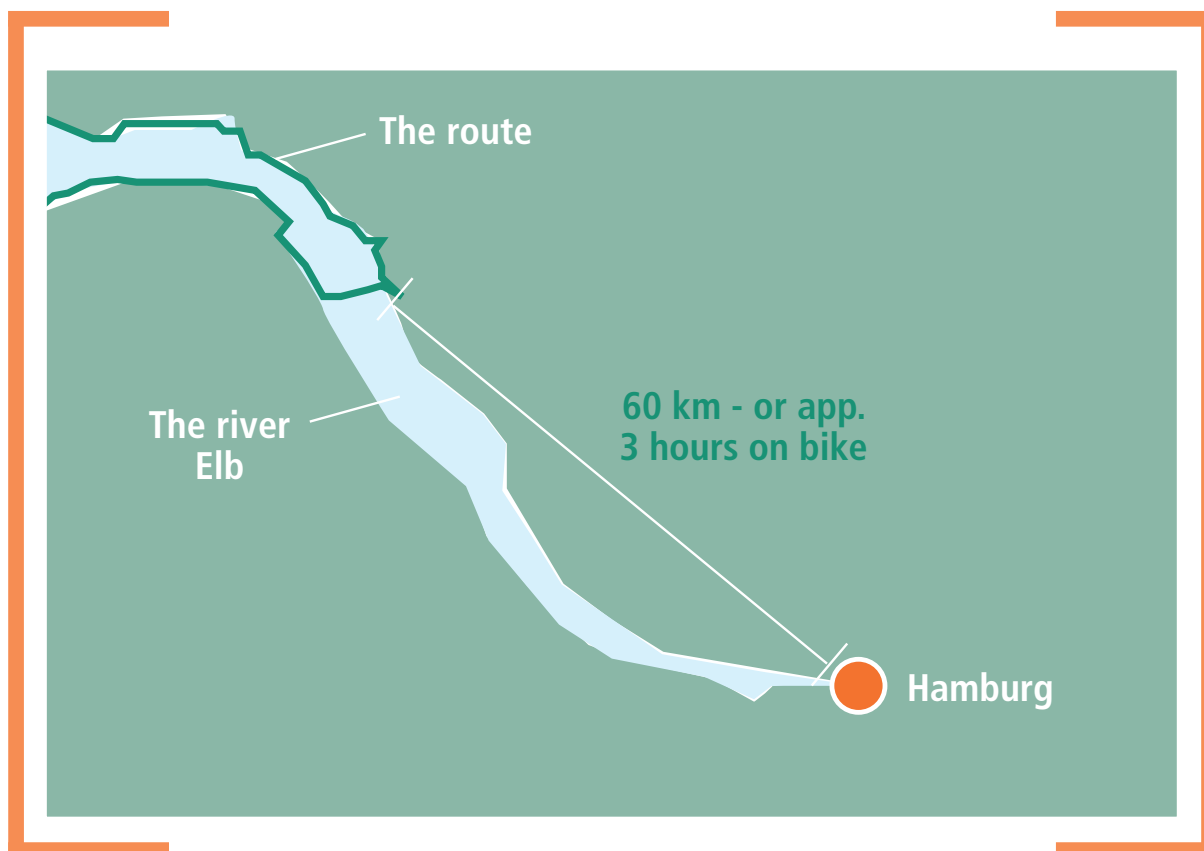
Establishing stages with towns as hubs is sensible. Using towns and attractions along the way improves the economy of the route: more places available for commercial activity. Every stage

can have multiple themes, so that towns and areas can come into their own and visitors can select where along the route they would like to stop for a break or maybe an extra night. Some visitors might not want to make use of established stages, but the focus on stages will attract most of them. This is beneficial both for maximising profits and for maintaining sustainable tourism in the years to come.

Having towns as individual hubs where a train or bus is available also makes it easy for hikers to travel on foot – and encourages the use of public transport rather than private vehicles, an important factor for the route's overall sustainability.

The city of Hamburg lies in the Prowad Link area, offering proximity to a larger market than usual. With one of the biggest and wealthiest cities along the Prowad Link, the route has a natural advantage over similar routes – especially as Hamburg is in the middle of the route and can direct its residents on trips along both the southern and northern parts of the route. The Hiking Guild in Hamburg alone has more than 350,000 members. Apart from Hamburg, the route features several other major cities: Amsterdam, Groningen, Bremen and Esbjerg are all on or close to the route. Thus the route is ensured a strong local market.

Route proximity to Hamburg



Psychological perception of physical accessibility and physical infrastructure

The route to be developed in the Prowad Link is part of a larger and more important mission: to protect special and vulnerable nature.

Nudging is used to a large degree in all aspects of human lives – often without our ever noticing, which is the whole point of nudging. In terms of the Prowad Link, nudging plays a decisive role. Visitors are away from home and therefore slightly out of their comfort zone. This means most of them will probably do what they are told is best. The route can steer people left rather than right when necessary – all it takes is the right argument. To achieve the best results, the truth might have to be bent slightly, if it steers a majority of visitors away from fragile environments.

The principle of nudging to ensure a specific behaviour can also be actively applied in the fight against garbage, which causes problems elsewhere, for example in the Himalayas³¹. It could also be used across countries and regions to make visitors take responsibility for their garbage and to lower public expenses for municipalities in charge of garbage collection and waste disposal in general. During the research phase, no nudging-based routes have emerged. Using nudging is a powerful way to turn negative, prohibitive messages into positive ones encouraging people to help each other take responsibility for the only nature we have.

Based on conversations with several of the participating partners, our understanding is that attitudes towards garbage collection vary enormously from nation to nation. Germans are better at following injunctions while the Danish and the Dutch need more directing. The British are used to the old custom of “right of way”, which allows them access to any parcel of land not specifically and expressly forbidden to them. This difference means that a concept relying on managing attitudes must also take cultural understanding into account, a subject beyond the scope of this feasibility report.

The route Berlin-Copenhagen³² is a direct competitor to the Prowad Link. On the German side of the route, from Berlin to Rostock, the physical conditions – pavements and so forth – are better than on the Danish part from Gedser to Copenhagen. However, this difference is not reflected in reviews that evaluate the Danish side equally positively. This does not mean that physical amenities are not important, but it does show that visitors who hike or cycle are not looking for the perfect track. What they are looking for is authentic and unique experiences, which are hard to define as a single formula, recreation in nature, exciting and rich animal life, etc. Luckily, the Prowad Link has these assets in abundance.

Combining local route with bigger route

All countries bordering the Wadden Sea have plenty of trails, paths and routes. Some are large, official ones while others are small and only locally known. The problem of attaching too many local routes is that it muddies the core concept. If the Prowad Link is planned to become a stand-alone brand it needs a simple and clear concept while familiarity about the brand is being built. Keeping it simple is often more beneficial in the early stages. Later, once a brand is established, more local routes and their natural synergies can be brought in.

Local backup and connections to local visitor attractions, tourism and leisure offers

Local backup is key. As previously mentioned, bottom-up development is crucial because visitors will actually pass through the areas involved. If local actors buy into the concept, visitors will enjoy far better experiences. Local residents, businesses and nature guides know about the hidden gems, and teaming them up with experts who know about environmental protection is key to success.

Development through bottom-up and local processes generates great local community support, with the added advantage that rare knowledge can be gleaned from local actors. Accordingly, individual parts of the route will be defined by those who know the area best. Connections with local attractions and offers are vital and local visitor attractions- and offers is of high value to the route.

31 <https://www.hindustantimes.com/india-news/a-himalayan-mess-growing-garbage-pile-a-threat-to-mountain-ecosystem/story-s5mLxH5c24DHmle9b5SKQIP.html>

32 Described in chapter 2, <http://www.bike-berlin-copenhagen.com>

Points of interest along routes

1. STOPS

All great routes have a fundamental principle about offering stops.

People often need something to aim for, somewhere to go. Mentally, people tend to divide journeys into milestones. Many need a physical location to reach and most don't like backtracking over paths they have already trodden. It's just human nature.

Local attractions provide the stops for the Prowad Link. Stops could be a museum, a viewing tower – or even just a particular tree or hill. In order to be a stop along the route, a feature needs to stand out from everything else and have a name. The name can be an existing one, like the name of a museum, or one made up expressly for the purpose. For instance, a tree can be “The Tree of Love”, evocative of some mythology.

2. CATERING AND FACILITIES

Local providers offer catering. Visitors along a route need access to food and liquid refreshments, as few of them will want to bring everything themselves. Assured access to food and drink must be evenly distributed along the route. The same goes for bathrooms, bike repairs, etc., as most target groups have high expectations of these particular factors.

At the moment, these facilities cannot be guaranteed on all stages of the route. This emphasises the need to involve as many actors along the route as possible and to persuade businesses and organisations of the value of opening their doors to Prowad Link visitors.

The actors of a minor new route that OE is currently involved in, “Tisvildevejen³³” in northern Zealand, have worked hard to involve all parties in an effort to give visitors the best possible experience. Even private homes permit hikers and cyclists access to water taps, cycle pumps and the occasional band aid. Because they have worked with bottom-up development from the beginning, these actors are successfully involving businesses and private homes in sharing the responsibilities.

3. TURNOVER

Spending taxes on a project that does not create employment, either directly or indirectly, is impossible in all the participating countries. As such, a potential investment in route development must focus on generating turnover for participating businesses, museums, guides, etc. Otherwise, continuing development will prove impossible.

As more visitors take up the route, new businesses will emerge. Other routes will business growth based on luggage transport, nature guides, etc. However, financial growth will primarily favour existing businesses capable of designing products attractive to both cycling and hiking visitors.

4. EXPERIENCES

The main experience of cycling or hiking in nature isn't the act of travelling itself. The experience is what happens while you cycle or hike. In planning out routes, organisers tend to focus on large-scale experiences and famous landmarks, but in reality, when telling friends about their trip, visitors are more likely to focus on small details or their connection with local residents and businesses.

Along a long route such as the Prowad Link, it is impossible to invent or create new experiences along the full route. Instead, the route must be made up of experiences already there. These experiences still have to be presented and staged, but this is a far cheaper undertaking than creating new landmarks or experiences from scratch.

A large part of the experience is how visitors feel they are perceived. By using positive rather than negative language and applying nudging rather than prohibition as much as possible, organisers can make visitors feel like agents of their own experiences rather than rats in a maze.

Physical infrastructure

If costs, cultural differences, local legislation and traditions meant nothing, this project might well propose a single approach to wayfinding in the form of signs, route markings, etc. At brand level, it would be fantastic for visitors to experienced coherent communication along the entire route.

This is unrealistic, though, and setting such goals risks ruining the chances of making the Prowad Link route a reality in three different countries. Highway signs are not the same across the participating countries in terms of colour, markings, etc., even though all parties have agreed at EU level on a numbering system for major roads. If they cannot agree on highway signs, the chances are that it will be difficult to streamline an approach to route marking.

Instead of proposing a single, globally implemented set of signs, markings, etc., the route has to approach the regional and national differences, literally and figuratively as “part of the charm” – both as something attractive when visiting different countries, but also what helps to distinguish between the individual charms on the charm bracelet.

Despite the assumed inability to produce common signage across national borders, it can be valuable for the project to be inspired by existing national signage, and to bear in mind that correct route marking is an important managerial aspect. The Netherlands especially have created some great concepts for hiking and cycling that might inspire locally where other countries desire better wayfinding approaches.

We estimate that it will be impossible to perfectly align wayfinding in the three countries. Nevertheless, other ways exist to give visitors a physical infrastructure that feels cohesive. On a peninsula in Denmark, Røsnæs³⁴, it was decided to use landmarks as the fulcrum. These are physical outposts, benches, etc., of a similar design that give visitors natural stops along a trail around the peninsula. The similarity of the benches gives visitors a sense of recognition, a cohesive concept.



Photo Ulrik Pedersen



Photo Casper Tybjerg

Environment and Society

If properly approached, this project stands to be a real monster of success. It is important to plan for this eventuality from the very beginning.

Natural resources are the core concept on which the tourism business outside major cities is based, active tourism in particular. They are the primary reason to go. The environment is the business – and being prepared to protect it while designing plans for tourism is good practice. This approach is referred to as responsible tourism development, because it aims to minimise potential environmental and social impacts³⁵ and thus deliberately assumes responsibility for the impact of tourism.

For the Prowad Link to have long-term viability, the priority needs to be protect first, and use second. However, in order to protect, the project's underlying economy must make protection sustainable as well as practically possible. Business interests must be aligned with those of nature protection.

A logical part of planning this route is to include the 17 UN Goals for Sustainable Growth. After all, large parts, if not all, of the Prowad Link are UNESCO-designated Heritage Sites and “Natura 2000”-protected areas³⁶.

From the outset, each new initiative in this project should consider the potential positive and negative impacts of its specific goals, and weigh these potential concerns when definitive action is taken. This implementation will work well with the long-term strategy that needs to be initiated to make the Prowad Link a reality.

SUSTAINABLE DEVELOPMENT GOALS



³⁵ Centre for Responsible Travel
- <https://www.responsibletravel.org>

³⁶ UNESCO Global Geoparks contributing to the Sustainable Development Goals, 2018 - <https://unesdoc.unesco.org/ark:/48223/pf0000247741>

Nature and environment – how are nature and landscape influenced by establishing a route?

As it aims to guide visitors in a very specific direction– with minor exceptions being hardcore SITs and particularly adventurous tourists who want to leave the beaten path – the route can make a direct impact in two specific areas. It has two environmental dimensions:

A: The route will direct visitors away from certain locations, thus protecting these areas and impacting their development by limiting foot traffic and everything that follows from a flow of visitors passing through an area. Fauna and flora will have an easier time, while areas nearby, but away from, the route will still need to be patrolled by national park employees so they are not forgotten. Businesses cannot be expected to take on a role in keeping these areas clean without having good reason to do so.

B: The route will direct visitors to certain locations, thus impacting them more directly through a steady flow of foot traffic. This is where the central focus needs to be. The stops along the route, as well as the route itself, need to be placed in suitably robust areas and, as proposed, bear in mind good access to businesses along the way. Such businesses are obvious partnership material and their support is vital, as they are needed in keeping the route clean and maintained.

This feasibility study is not about environmental insights – OE's expertise is market and SME development. However, environmental protection is an essential consideration in building a sustainable route, and the environment is both the primary reason to go as well as something that needs to be protected.

When designing the best routes, project facilitators, planners and project leaders must bring in help from two different groups – experts and local actors – and make sure that they exchange knowledge and information. The route is initially planned according to recommendations from environment and nature preservation experts who ensure that no over-fragile areas are included. Afterwards, local actors are invited to provide input or design local paths and trails.



Photo Thomas Hoyrup Christensen



In terms of steps, a route user makes an impact before, during and after a visit:

BEFORE

Covers transport to and from the route. By placing hubs for the route's start and end stages at or near train stations, the route gives visitors a fair and attractive alternative to driving their car to their prospective hike/cycling trip and lowers emissions for this part of the route, while making the route easily accessible for all potential visitors regardless of car ownership. Taking responsibility at all stages, including transport to and from the route, is in the spirit of the Prowad Link. It also means that hopping stages is easier.

DURING

Experts and local authorities must consider the impact of actually walking the route. The main issues are garbage collection and maintenance, which is why local partnerships and routes with good upkeep are essential. There is also the issue of the route's general robustness, which means considering whether paths can take a certain amount of foot and cycling traffic without being destroyed or eroded.

As part of the route design, it might be an idea to consider using "manufactured scarcity"³⁷ for parts of the route. This approach creates certain "choke points" that make it possible to control and disperse the number of visitors passing through in a given time interval.

This will be a great story to use in publicity and a way to divert traffic. It must, however, be assumed that visitors can find other areas to pass through and diverted traffic must thus be considered. Manufactured scarcity can also be an interesting take on areas outside the planned scope of this project that deal with excess tourism.

AFTER

Concerns include providing visitors with proper hubs that can handle any garbage they may have brought along, while also offering appropriate accommodation options. Having given visitors an amazing experience, at this stage the route is also ready to engage visitors as future ambassadors who will spread the message by word of mouth. Promoters generally overlook this much-needed step, which is often claimed to be the most valuable form of advertising. Not only is it free, it also originates in relationships of trust that few companies can match.

Simply asking visitors to spread favourable reviews is good practice and also a way of ending the customer journey on a high note – setting up a final interaction with the visitors that becomes what they remember afterwards rather than an accommodation bill that arrives late.

Socio- and local culture

Population

The project has the opportunity – and is indeed obliged – to involve local businesses and stakeholders that will take responsibility and influence the specifics of building the route. Such local stakeholders include private individuals either involved in NGO work or otherwise volunteering or simply acting on their own initiative, motivated by personal interest; SMEs; local organisations both public, municipal and regional; and private NGOs with vested environmental and social interests, for example, in the process.

Cultural

Involvement will boost local pride and identity and the local economy, and have the added secondary effect of assisting the community.

³⁷ Like permits to the gruelling Pacific Crest Trail that are few and far between. Other examples are Coyote Buttes North, Phantom Ranch and others. As described by USA Today - <https://www.usatoday.com/story/travel/destinations/2018/04/05/park-permit-lottery/487689002/>

Remember that vast cultural differences and individual situations will have to be factored in at certain stages. Different motivations for contributing to the route will come into play. Some areas, as is the case in North West Germany, are already at full capacity and arguments about planning and utilising environmental protection will be more motivating. Other areas, like The Netherlands and the northernmost parts of Germany and Denmark, want more visitors. At local level, the appeal will be a mix of civic pride and the prospect of a stronger economy.

Synergy with local development

Synergy with local development is essential. Planning ahead and defining the themes, designs and physical infrastructure of local stages along the route require municipalities and regions to be in alignment about the common goal. A lengthy perspective is necessary, but that necessity is both an obstacle – as short-term benefits are much easier to communicate – and an opportunity, because preservation efforts and social considerations can be implemented within a reasonable time.

With the right arguments, a route with the correct approach will influence the development of a local community. Plans for developing one area may be brought forward to facilitate successful use of the route. A weighty argument is that outdoor and special interest tourism are strong incentives for local communities to lessen their youth drain, keeping and re-attracting young people to their area. An example is Bornholm, whose geographic location could hardly be more unfortunate in terms of retaining and attracting young people to settle there, but whose nature and tourism business nonetheless manage to do so.

Infrastructure

The route's potential to draw large crowds and to properly distribute them must be considered in area plans, investments and local and regional business development. These local plans will also affect settlement strategies, as bottom-up development involves passionate local actors. At later stages new businesses will begin to appear to meet the various demands of the passing and arriving visitors.

Environmental protection will have to be incorporated to prevent fragile nature having "suddenly" to be helped or saved if, for example, foot traffic is higher than expected.

Development funds, local business and infrastructure projects and public funds need to be designed with the route as an end goal in mind.

Economic cost/benefits for local communities

Once the route is a success, the economic benefits will become apparent, and the new jobs it creates will have an added benefit: most tourism jobs are service-oriented and place-specific. They tend to attract unskilled labour and as such add much to the local economy. In relation to the route's goal of seasonal extension and better visitor distribution, these jobs will bring another advantage as they will be year-round rather than seasonal.

According to Danish calculations from VisitDenmark and Statistics Denmark, a full-time job is created for every EUR 110,000 in turnover³⁸. With the international appeal of outdoor tourism routes, more international visitors can be expected, securing better export value than domestic tourism. The German tourism industry is currently geared towards domestic visitors, who accounting for more than 90% of all tourism in the country. Scouting for employees who speak foreign languages and/or teaching foreign languages to existing ones will therefore be vital importance in future.

Investment that has a specific end-goal in view is also far easier to target and align. This project is a long-term investment in outdoor tourism specifically – currently the fastest-growing form of tourism. With the increasing focus on preservation and the value of nature, this development is likely to continue.

The costs consist of the various short-term investments that need to be made and the gearing of local businesses to accommodate to the new route. Some construction may have to be planned and completed with long-term benefits in mind.

38 VisitDenmark - Turismens Økonomiske Betydning 2017 - https://www.visitroskilde.dk/sites/default/files/asp/visitroskilde/turismens_økonomiske_betydning_i_danmark_2017.pdf



Photo Red Star



Photo Ulrik Pedersen

Economics

Which partners could be linked to the route?

If a project is to gain any momentum from the beginning, it is often beneficial to start with just a handful of partners. Limiting oneself to focusing on only a few partners often conflicts with a desire to please and include as many as possible. This is, however, a bad solution since it means too many opinions needing to be heard, too many meetings, too many different interests, etc.

To successfully launch a project, bringing only a few motivated partners on board is often a better and more efficient solution. One of the main advantages of this approach is that the involved partners' working timeframe matches that of the project. Consultants and marketers, for example, are used to working on projects with shorter timeframes than public planners and national park employees. The timeframe for a cycling route is 5-10 years, so one should consider starting with a small group of people with experience in long-term projects.

The partners should be included in multiple steps. During the first two years, national parks should be present when decisions are made. Additional help might be needed for business development. Here, we recommend inviting people from a DMO, because they have the right competences, or consultants for clearly delimited tasks.

Three to four years into the project, marketing people and local DMOs should be brought in to advise on or execute brand development and profiling. Considerations about whether the project should be implemented as an Interreg project should be made at this stage. This approach can help with the financing of project management, wayfinding, etc.

When four or five years of work have been put into the development project, everyone should be included and engaged, since the project has a developed stakeholder analysis and a specific inclusion plan. It is fruitful at this stage to think bottom-up, so that villages with volunteers, museums, enterprises, etc., are included. If they are included before a strong concept that benefits them has been developed, it is to be expected that most dialogue will centre around questions and confusion. On the other hand, if local actors are invited to join a concept that benefits them from day one, it is easier to control the development, and the time is spent on development rather than futile dialogue.

From experience with other projects, we recommend to using an advisory board from the beginning of the project. It could consist of key persons with a wide-reaching interest in the project from private enterprises or public organisations. A recommendation is to include strong NGOs in such an advisory board. Their great knowledge will benefit the development of the project and is a way to avoid misunderstandings later on. Balancing issues with an advisory board is important from the beginning. The advisers' role will be as counsellors, not decision-makers.

How to involve local partners in route development?

Local partners are crucial for a successful route. Working on a route requires money from investments or time used by colleagues who could be doing something else. It is therefore imperative that a new hiking and cycling route creates new jobs.

Many projects involving local participation exist. The lesson from these is only to involve local partners when something specific is on the table. Local enterprises, local communities, NGOs and others are typically not very keen on change – especially not when it comes to tourists, since many actors see the problems that change engenders at the beginning rather than the opportunities that come with them. Local partners should therefore only be involved when there is a strong concept with a stakeholder analysis at hand. At this stage, the contributors are known, as are such issues as what is expected from them, how they can contribute, what the gains will be, etc. Local partners should not be included in the project before these questions can be reasonably answered, otherwise this might lead to too many challenges at an early stage.

Once readiness to include local partners is in place, alternative thinking is recommended. Many petrol stations generate more turnover from hikers and cyclists than museums. Shops are often forgotten in tourism, where the focus easily can be directed to hotels, restaurants, guides, and so on. However, tourists contribute to local trade in many places, since many are more willing to pay when on a vacation or trip.

Estimated economy for the next phase of a route

As research shows, a future route has great potential. It could therefore be fruitful to invest in the next phase. Working with regional project partners from three different countries requires coordination and travel, which leads to greater expenses in time and money than if the project were confined to a single country.

Keeping the project small to start will help keep costs low. Estimating the cost is strongly related to the cost of hours spent within existing organisations. Four coordinators are suggested to get the project off the ground: one Dutch, one Danish and two from Germany.

Fortunately, a small project start only requires 10-15 hours of work per week per local coordinator. Given the project size, senior employees will not be required from the beginning. The coordinators have to be good with people and have sufficient language skills. Using staff with experience in life and travelling is useful, since early dialogue with stakeholders often proves difficult for people straight out of school. In order to build a route, the primary people working on it need to be determined and be able to see the potential in something abstract. Experience from similar projects shows a correlation between having the right people in the early phases of a project and the possibility of success. The right people can make something great against all odds.

One coordinator should have the lead role as the project manager for the entire route project. Since Germany is the connecting point and also the longest stretch of the route, it might prove beneficial to have a German in this position. This role requires an estimated five hours of extra work per week to set up meetings, keep information flowing between the coordinators, etc.

The usual procedure for larger projects is to have each partner choose a coordinator him- or herself. With multiple partners, this can lead to a rather random set of competences, and the

group dynamics may be equally haphazard. Deciding on a set of preferred competences for a group of coordinators beforehand and recruiting coordinators on this basis are imperative. This will ensure that the desired set of competences will be met, and the group dynamics and interaction of the group are more likely to be successful.

Besides the costs associated with part-time project coordinators, there will be expenses for travelling, hosting meetings, etc. These could be kept at a minimum by using own meeting facilities and by hosting regular online meetings.

Estimated overall rough budget for construction costs

Making a budget is a difficult task and would require a detailed roadmap for the project. However, an annual investment of less than EUR 200,000 should be enough to get the project running with the four project partners.

If external business development help from consultants is required, this could be limited to less than EUR 50,000, since many of the competences required are already available within the stakeholder organisations.

If marketing programs are desired, the expenses will increase substantially. If marketing is kept simple and efficient and is shared among the partners, a marketing package can be developed for under EUR 100,000. This would include design, photo, film, copy, website, etc. If there is a wish to supplement the route with online tools, such as apps, augmented reality, and other technologies, the costs will quickly reach EUR 50,000-100,000, depending on the expectations. However, these tools are quickly becoming standard and as the costs are dropping rapidly they are becoming increasingly accessible.

Many hours of project management are required to build strong local partnerships. The stakeholders have strong partnership programmes already. Using these would lower the costs, but



Photo Niclas Jessen

forging strong relationships with villages and organisations, etc., is time consuming. It is therefore estimated that after four or five years, during the later stages of the project, at least four full-time employees will be needed. However, the results of the preceding work on the route should also start to be emerging, making these types of investments easier.

If it is decided to invest in and build strong wayfinding like that done in The Netherlands, the investments on a 400+ km route will quickly soar into millions. Since devoting all efforts to a wayfinding concept could kill the project before it even starts, we suggest wait at least two years before considering the massive task such a project would entail.

Proposals for funding construction

Desk research has shown that millions of euros are currently being spent on building landmarks in Northern Europe. New harbours, hotels and museums are being built in Germany, The Netherlands and Denmark. Tourism is big business. Many local jobs rely on investment in its growth. EU Interreg projects operate with budgets in the millions. Private donations from corporate and governmental funds and programmes are providing unprecedented support for the growth of the tourism industry and nature programmes. Money is available.

Experience from earlier projects shows that local politicians in Northern Europe are most interested in projects involving construction sites, since there are red ribbons to cut. Local funding for a transnational route without a physical building could therefore prove to make local funding difficult.

Pitching the route is however not difficult. The route crosses borders and, with its focus on hiking and cycling, celebrates some of the most unique nature in Northern Europe. This brings up the idea of Interreg, which could provide funding in the millions when the route is sufficiently developed to potentially be put into practice. A recommendation would be to avoid a world-class wayfinding concept, and instead apply

for various national and regional funds that can help make the route a reality.

Reflections on running costs

Running costs are often underestimated, since the costs of the construction itself often steal all the attention. Building a route is cheap. Maintaining several hundreds of kilometres is, on the other hand, very time-consuming and hence expensive.

Often, the responsibility of maintaining routes falls on the local governments. Given that these are usually not rich, they are concerned about running costs. Using existing trails could avoid a conflict over maintenance expenses.

Tourist numbers do not increase overnight, so the extra associated costs will likewise only grow slowly. However, if something expensive is built to attract visitors, then running costs will be created early in the project. The costs can be kept low by an intentional plan to introduce visitors to discover the new route slowly and gradually, while allowing time to build the infrastructure according to the bottom-up principle mentioned earlier that ensures the involvement of local villages, volunteers, etc.

When the running costs start to increase, it is easy to prove that the increased number of visitors has made an economic impact that justifies the higher costs. However, modern travellers tend to be more demanding, requiring access to water, toilets, healthcare, good trails, etc. Accordingly, the cost of running a long route in Northern Europe will most likely turn out high if the route is to be successful. Fortunately, starting small and with smart planning will postpone high running costs until after the success has been achieved.





Photo Ulrik Pedersen

Summary of recommendations

WHAT

Design a unique route through the three countries, in accordance with best practice

Keep ambitions high – you have a very unique route along The Wadden Sea

Make sustainability an integrated part of the route incorporating UN Sustainable Goals in the strategy and plans is a convincing way of taking precautions to protect vulnerable areas

Prepare for success – make sure that decisions concerning the physical route, partners and communications are scalable

Think commercially and act sustainably – make an effort to make the ends meet, since it takes money to establish and maintain the route

WHY

Taking advantage of the growing demand for outdoor and Special Interest Tourism by developing an internationally attractive product for the future

Tourists will support the local economies and the social sustainability as well as a proud local identity in rural areas

WHO

Establish the organisation on an understanding of nature and sustainability, add marketing and commercial partners later in the process

Begin building organisations right away - local at first, international second

Make local insiders important partners; they know important local details of routes, nature, businesses and politics

HOW


Respect differences and make it your biggest force communication and branding should support viewing different themed parts along the route as charms on a bracelet

Tie hubs together to create one coherent significant route. Doing so will streamline communication, cooperation, and make physical distance an advantage

Use nudging to conduct traffic away from vulnerable areas by making robust areas attractive – from planning attractions and themes to branding and local wayfinding

WHEN

Start right now and be patient – it might take ten years or more before you reach the vision – and by then much may have changed



Nature Tourism
Route around
the North Sea Region

Developed in collaboration between
The Wadden Sea National Park and
ORANGE elevator november 2019



Nature Tourism Route around the North Sea Region

Addendum A to chapter 2: Market. Other similar routes



Additional detail on existing routes described in the main report. These cases are a selection of nature-focused routes available for cycling and hiking that have informed and inspired the feasibility study at hand.

Donau-Radweg

Characteristics

Every summer many of Europe's cycling tourists gather along "der Schönen blauen Donau". The Danube river flows through 10 countries, but this analysis focuses on how Germany has directed its tourism efforts, because the supply of products for tourists seem the most developed in this country. In Germany the Danube Cycle Route (Donau Radweg) ranks among the most popular, and cycling in general as a form of vacation is currently booming in the country, growing faster than almost any other segment in tourism. This is an indication of the growing tendency amongst tourists to choose active/outdoor vacations. In 2018 there were 5.5 million cycling tourists in Germany, up from 4 million in 2014. Touring cyclists are six times more likely to arrive by train than the typical holiday-maker, making cycling tourism one of the most sustainable forms of travel.

The Danube Cycle Route requires that visitors are mobile, but not necessarily exceptionally fit, since the route is generally flat. With the advent of electrical bicycles, the requirement for completing the route is even lower.

Digital infrastructure

The route's digital infrastructure is concentrated around three digital hubs individually operated by the three operators: Radweg Reisen, Donaureisen and Trauni's Radferien, which promote and directly sell packaged trips along the Danube Cycle Route¹.

Physical infrastructure

Tourists receive maps with directions when they buy a route from one of the three actors. However, the route is well-signed, and tourists can easily follow it without having to buy a ready-made product from these companies.

Organisation, finance, management and marketing

These three agencies are the main suppliers of routes for tourists, with Radweg-Reisen being the most prominent. All three provide customers with full catalogues of ready-made routes from which they can choose the desired option. The packages typically include entry tickets to the main tourist attractions along the route, accommodation at local guest houses/hotels, breakfast, cycle route descriptions on maps and luggage transport.

The agencies organise everything, so all that customers need to do is pay a one-time fee and focus on pedalling and enjoying themselves without having to book extra services along the way.

The three companies therefore act as mediator ensuring that everything from catering to information is in order so that guests can have the best possible experience.

Although though these private actors are the most visible when it comes to planning a cycling vacation along the Danube, general data suggests that most cycling tourists (81%) plan their routes personally. As the data does not derive specifically from the Danube, but relates to cycling tourism in Germany as a whole, our conclusions may seem slightly vague. However, the same study shows that two thirds of cycling tourists in Germany would prefer to have ready-made route suggestions. We recommend that Prowad Link developers keep this knowledge in mind, since it indicates that tourists are willing to be nudged in the direction they are intended to go – away from fragile nature and towards SMEs with products to offer.

The common platforms sell packaged products along the route and accept a premium. The organisation as a whole is also funded by paid memberships from individual partners.

Radweg-Reisen's online platform gives local SMEs a common voice – however, only the main actor, Radweg-Reisen, is visible. No local hotels/guest houses are mentioned by name, so they seem to disappear and make it more difficult for the smaller actors to make additional sales in advance.

A heavy focus on summer tourism is common to all the private actors. Their product offerings run from early May until early October, where the high season is from early June until early September.

The predefined travel packages from the suppliers' catalogues can serve as a guideline for developing a route in the Wadden Sea area. With pre-established recommendations for routes to take and attractions to see, tourists will be nudged to the road places, visiting the SMEs and spend some money and away from less robust areas of nature.

The Donau Radweg partners are presented in an integrated cohesive online catalogue with booking options. Exposure is mostly through out-of-home campaigns and online advertising.

¹ Radweg-Reisen <https://www.donau-radweg.info/>, Donaureisen <https://www.donaureisen.at/> and Trauni's Radferien <https://www.radferien.com/>, <https://www.germany.travel/dk/fritid-og-afslapning/cykling/donauradweg.html>

Jurassic Coast

Characteristics

The Jurassic Coast is a 155-km stretch on the south-west coast of England. It is recommended that visitors explore the stretch by foot, while taking detours on some of the many trails connected to the main route. While Jurassic Coast is intended as a hiking route, growing interest means the focus is shifting towards cycling. Many of the trails are loops, so that visitors can explore the area, and thus the SMEs, while still be sure that they are “on track”. This means the trails do not lead naturally from one to the next, and hikers and cyclists thus do not naturally “progress” in the same way as visitors do The Camino in Spain. The Jurassic Coast should therefore not to be seen as a linear challenge to overcome or complete. Rather, it has a “web-logic” that invites visitors to pick a central place along the stretch, and from there explore the surrounding trails and attractions in a loop-like fashion.

Physical infrastructure

The Jurassic Coast path is part of a larger national trail – the South West Coast Path. This means signage is consistent throughout the route, with the entire Jurassic Coast waymarked with signs and paths to keep visitors on track. Sometimes a sign is the simple image of an acorn, as the oak tree is the national symbol of the UK, or signs that say South West Coast Path².

Digital infrastructure

Maps of the many connected trails can be downloaded from the website³. The maps are free of charge, but visitors are encouraged to make a small donation as a contribution to the development of new routes.

Organisation, finance, management and marketing

In April 2003 The Tourism Company was commissioned to prepare a marketing strategy which would “provide a single, coherent marketing approach for the effective and sustainable development of the Dorset and East Devon Coast World Heritage Site”.

This was the starting point for an increasingly private model, where partners pay for their inclusion in marketing materials and products around the area of the Jurassic Coast. Jurassic Coast generates income primarily through donations and grants, while also receiving around 10.5% of its revenue through “other trading activities”.

In addition, the organisation consists of a business network. This network provides three levels entitling participants to different benefits depending on the level they wish to partake in:

Level 1:

Actors are listed on the Jurassic Coast website, are granted certified branding and are invited to events (GBP 250/year)

Level 2:

As above plus mentions on the “highlights” page. They can also share content on Jurassic Coast’s social media channels (GBP 500/year)

Level 3:

As above plus promotion in Jurassic Coast newsletters and the possibility to be “partner of the week” on social media (GBP1000/year)

The business partner scheme accounts for 11.7% of the organisation’s total income.

The scheme provides financing for the Jurassic Coast as well as a strong platform for local SMEs who enjoy the benefits of a common platform and a common voice. Besides helping to sustain the World Heritage Site and thereby enhancing the site as a whole, the donors in the business partner scheme gain great benefits by being part of the network. Jurassiccoast.org has around 500,000 unique visitors every year, thus offering ample exposure opportunities for participating actors. Consequently, all actors promote their market together, an example of a long-term interest, while ideally also promoting their own interests via exposure – a short-term interest.

In conclusion, SMEs are playing a greater role in the development of the site and building an organic business model. It is organic in the sense that the independent SMEs, the cells, thrive better individually if the organism as a whole (Jurassic Coast) is thriving. Protect and prosper.

While the rest of the data is inconclusive, a general trend can be seen in the affected counties (Dorset and Devon). According to VisitBritain, the South West region is currently experiencing a strong increase in visitors. The region welcomed 13% more visitors in 2017 than in 2016, a further increase on the previous year’s growth (9%). When looking at the counties of Devon and Dorset, it appears that they host the region’s (South West) highest number of day visitors, a total of 55 million in 2017. The total spend of the day visitors was GBP 1,942.5 million.

For staying visitors, Dorset hosted people for a total of 15,916,000 nights, which amounted to a total spend of GBP 897 million. Devon had visitors staying for a total of 24,598,000 nights, which translated into a total spend of GBP 1,401 million.

A small group of only nine employees manage the Jurassic Coast, with additional support from a board of trustees. However, they are helped by a body of from than 50 active volunteers and ambassadors. Much of the initiative is, therefore, made possible from the helping hands of local residents.

The latest available marketing strategy is from 2007, and the main focus is building the brand and providing materials primarily to local consumers⁴.

² <https://www.southwestcoastpath.org.uk/>

³ jurassiccoast.org

⁴ https://jurassiccoast.org/wp-content/uploads/2006/07/jurassic_coast_world_heritage_site_marketing_strategy.pdf

The N8 cycle route, Danish part of EuroVelo 10

Characteristics

An 820-kilometre cycle route loops its way round the southern part of Denmark while also being connected to the European Bike Network in Padborg⁵. The route officially opened in 2018, so we are still waiting to see the long-term effects. For now, though, it can be said that the reception has been highly positive. In March of this year, the route acquired international fame, winning the Cycling Route of the Year Award 2019. The route was awarded by a jury at the international Cycling and Hiking Fair (Fiets en Wandelbeurs) held in The Netherlands⁶.

Physical infrastructure

The route consists of two loops shaped like a figure 8 on its side, or an infinity symbol, meaning that the tourists can divide their trip into shorter stages and supplement it with local detours to visit some of the actors close to the route. They are not geographically compelled to ride both loops. This makes the N8 route very flexible, and tourists of varying cycling proficiency of ambition can enjoy the cycle ride – an advantage further underscored by the fact that the Funen part of the route received the UCI Bike Label in 2017 for its commitment to cycling at all levels⁷. Tourists do, however, have to take multiple ferries and cross a few bridges in order to complete the route in its entirety.

Digital infrastructure

The digital infrastructure surrounding the N8 route is non-centralised and as such not particularly accessible to outsiders who want to learn more.

The route is operated and backed by 17 different municipalities as well as multiple public and private actors⁸, but they have yet to combine their efforts on a shared website.

Right now, information is only provided for local stretches through each tourist destination. An interactive map⁹ is, however, available.

Organisation, finance, management and marketing

Although the route has no common voice through a platform of all the actors involved, it has a sense of cohesion. Through an obligatory national strategic collaboration between central government, local municipalities and travel agencies, the longstanding ambition is to create one of the best routes in the world. The collaboration ensures uniform signage and route maintenance, and by 2020, the route¹⁰ is expected to generate an additional EUR 26.7 million of income from tourism on Funen alone.

As well as the municipalities that are assuming much of the responsibility to create a well-functioning route, some local actors are also participating. Many SMEs are collaborating in a Danish-German network called “Bike Friends”, allowing cyclists to use restrooms and fill their drinking bottles on the way¹¹.

5 <https://cycling.waymarkedtrails.org/#route?id=20828&-map=9!55.1528!11.1049>

6 <https://www.uci.org/news/2019/two-awards-for-uci-bike-region-fyn>

7 <https://www.uci.org/cycling-for-all/bike-city-label/fyn>

8 Dansk Kyst- og Naturturisme, VisitDenmark, Dansk Cykelturisme, The Danish Road Directorate, Destination Fyn, Destination Lillebælt, Business Lolland-Falster, Visit Vestsjælland, Visit Sydsjælland-Møn, Destination Sønderjylland, and Naturturisme I/S

9 https://www.naviki.org/da/denmarkbybike/planlaeg-din-cykeltur/?tx_naviki_pi_way%5Buid%5D=13007121#p=55.14615343928844,10.70146267661059&z=8.

10 <https://www.dr.dk/nyheder/regionale/fyn/hop-i-sadlen-820-kilometer-lang-cykelrute-skal-lokke-mange-turister-til>

11 <https://www.naturturisme.dk/1362-cykelturisme.html>



Photo Ulrik Pedersen

Copenhagen-Berlin Route

Characteristics

You can ride your bike on a marked route all the way from Berlin to Copenhagen and back again. The route has been on the drawing board from as early as 1996, and was officially opened to the public in 2001. Back in 2014, 7,000 tourists enjoyed the full experience of cycling all the way from Berlin to Copenhagen or the other way around. This translates into more than 30,000 overnight stays and 90,000 meals consumed, along with greater footfall in museums and other attractions¹².

Physical infrastructure

The route is divided into three stages: one in Denmark, one in Mecklenburg and one in Brandenburg. Each stage is then split into smaller stretches ranging from 26 km to 70 km, with multiple UNESCO sites along the way. In Denmark the route also features recommended detours called “panorama routes” that tourists are recommended to take along the way¹³.

Although the route invites visitors to do the full trip – hence the name “Berlin-Copenhagen” – it is also marketed as a route where visitors can just jump on, complete one of the three stages and visit some of the panoramic route. Tourists are not obliged to do the full tour – which is just as well, because it is estimated to take 11-12 days¹⁴.

More and more electric bikes are seen on the roads, an increase that the route accommodates by providing charging stations at 40-km intervals along the route¹⁵.

One of the challenges of having different actors on a transnational route like the Berlin-Copenhagen route is the varying signage along the route. The entire route is signposted, but in Denmark it also forms part of national routes 8 and 9, whereas in Germany the route is signposted with the official route logo. Users are recommended to buy a map or take their smartphone along. Printed books with a detailed overview are currently only published in German.

Digital infrastructure

The Berlin-Copenhagen route has an official website in Danish, English, and German¹⁶, which has been one of their core marketing strategies. The website presents the visitors with an interactive map. The map shows numerous accommodation options such as hotels, hostels and camp sites, as well as clearly marked charging stations and tourist attractions. Local actors on and near the route are thus clearly visible, and have taken part in the initiative by providing the website with brief summaries of their offerings and their contact details, so the tourists can be directed to their respective booking platforms. The interactive map on the website is smartphone friendly.

Organisation, finance, management and marketing

Besides being EU-funded, the route is part of the EuroVelo route 7, which means that multiple actors have taken part in the funding – from national, regional and local governments to commercial service providers, NGOs and private donations¹⁷. Since the route is transnational, multiple actors are responsible for its management. The following are involved along the Danish stretch of the route:

- Marielyst Turistinformation
- Nykøbing Falster Turistinformation
- VisitSydsjælland-Møn
- Køge Turistinformation
- Hundige Havn og Turistinformation
- Københavns Turistinformation

On the German stretch, the following are involved¹⁸:

- Tourismusverband Ruppiner Seenland e.V.
- Tourismusverband Mecklenburg-Vorpommern e.V.

However, although the route involves multiple, transnational actors, a key marketing strategy element was to design a website for the route in its entirety, rather than the actors having multiple individual websites dealing only with *their* specific part of the route.

While different organisations in different countries manage the route in general, local actors still know how to take advantage of the route’s branding value. As an example, you can rent a bike in Berlin at Fahrradstation¹⁹ and return it in Copenhagen at MTB Tours and vice-versa²⁰. Many other actors have taken the opportunity to enter public partnerships and been certified as Bed+Bike cycle-friendly business, which, if done collectively, reinforces the route as a brand as well as the individual actors.

12 https://cykelturisme.dk/wp-content/uploads/2016/02/panorama_72dpi_enkeltsidet.pdf

13 <http://www.bike-berlin-copenhagen.com/route/three-stages>

14 <https://jyllands-posten.dk/livsstil/rejser/ECE10725578/tag-cyklen-fra-koebenhavn-til-berlin-og-oplevel-smuk-natur/>

15 <http://www.bike-berlin-copenhagen.com/da/content/faq-travel-talk>

16 <http://www.bike-berlin-copenhagen.com>

17 <https://en.eurovelo.com/about-us>

18 <http://www.bike-berlin-copenhagen.com/da/content/kontakt>

19 <https://www.fahrradstation.com/>

20 <http://mtb-tours.com/proin-in-quam-est-turpis-duis/copenhagen-to-berlin/>

Kattegattleden

Characteristics

Kattegattleden is a 395-km cycle route along the south-west coast of Sweden. It opened in the summer of 2015 to become Sweden's first national cycling route. The route was nominated European Cycle Route of the Year in 2018 at Fiets en Wandelbeurs – so its organisers must have done something right, at least in the narrow sense when compared with other cycling activities²¹.

But how does it fare more broadly as a business, and who are the visitors? No direct impact study has been made of Kattegattleden. However, in 2017, Destination Halland, the county most influenced by Kattegattleden, conducted a study that showed a small decline of 1.4% in total visitors compared with 2016. The study speculates that this could be explained by the mediocre weather in the summer months, which may have influenced the number of tourists who usually go camping. However, since tourists stayed for 2,665,406 guest nights in Halland in 2017, the impact from the industry is still worth noting. Another trend in Halland is that more rooms for accommodation are becoming available. From 2016-2017 there were 5% more rooms available for booking, indicating that the market is preparing for a greater influx of tourists. The study also shows that the majority of the visitors in the county are campers – 57% – so outdoor tourism has proved quite popular on the Swedish coast²².

Physical infrastructure

The route consists of eight connected stages from city to city. It has no loops. Instead, it is a linear stretch from Helsingborg in the south to Gothenburg in the north. It starts or ends right by the transport terminuses in the two cities, so it is easy to get to the route via train or bus. Kattegattleden has its own signage system which is consistent throughout the route: the signs are dusty red, “Kattegattleden” is written in white, and signs show an arrow with a number “1” (because it is the first national route in Sweden). At certain points signs show the distance to the next the next city or tourist destination. The route is primarily on asphalt and car-free.

Digital infrastructure

The route has an official website²³, giving tourists the impression of an organic and coherent experience waiting for them in Sweden. It also gives local stakeholders, which include restaurants, hotel owners and tour organisers, a common voice. Visitors can use the website's interactive map to search for their preferred type of accommodation along the route, as well as food and drink, and relevant bike facilities.

Tourists are then directed to the respective actors' own websites if they wish to book one of the services listed on the map. Full GPX files (specific information for GPS) for the stretch in both directions, from north-south and south-north are also available for download.

Financing, organisation, management, marketing

The route is primarily managed by the region, Halland, but the Skåne region, the Swedish Transport Administration and the local municipalities are also involved. So, although government bodies do most of the ground work, the initiative is also intended to boost business development, economic growth and job creation in the municipalities. For Kattegattleden to succeed, local actors need to be visible and ready to service tourists, while also greatly benefiting from having a common voice and the branding of the region as a whole. Interaction and teamwork from top to bottom are key here.

One of the early core marketing strategies was to develop a strong website. A year after the route opened, the focus moved beyond Sweden, with international press trips and collaboration with travel bloggers raising international awareness²⁴.

Another feature of this case concerns some of the tourist profiles and/or financial impact caused by the route. Already a few months after the route had opened, 65% of local businesses saw a growth in the number of cyclists visiting the region, and around 85% of local businesses expressed a wish to continue tailoring their business to accommodate the needs of cycling tourists. The same percentage of businesses – 85% – also foresaw that Kattegattleden would have an impact on their business in future²⁵.


21 <https://kattgattleden.se/en/2018/03/kattgattleden-arets-cykelled-2018/>

22 <https://destinationhalland.se/wp-content/uploads/2018/04/Hallands-1%C3%A4n-2017-%C3%A5rsrapport.pdf>

23 www.kattgattleden.se

24 http://www.landsbygdsnatverket.se/download/18.24c04a5a15786891f68ee4bb/1475586366294/Kattgattleden+LLUH_160929.pdf

25 http://www.landsbygdsnatverket.se/download/18.24c04a5a15786891f68ee4bb/1475586366294/Kattgattleden+LLUH_160929.pdf



**Nature Tourism
Route around
the North Sea Region**

Developed in collaboration between
The Wadden Sea National Park and
ORANGE elevator november 2019

