Building Tourism
Stakeholder analysis 2012

by

Wonderful Copenhagen

Research & Development

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Content:

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1. Introduction

1. Introduction

Background

In 2021 the Fehmarnbelt tunnel will open and connect Scandinavia with continental Europe. With the fixed link follows a high growth potential, also in the case of the tourism industry. In order to ensure maximum benefit of the fixed link, it is important to have a long-term strategy for how we can work together across the Fehmarnbelt region with concrete initiatives in tourism.

Therefore STRING* and Femern A/S in partnership with Danish, Swedish and German regions, municipalities and tourism organisations in the region have taken the initiative to develop a tourism strategy entitled ‘Building Tourism’.

The main purpose of the Building Tourism strategy is to encourage more people to cross the borders to visit other parts of the Fehmarnbelt region, and to help develop the overall market place for tourism in the region in order to attract more international visitors to the region. In the end this will help create growth.

*Strategic Partnership in the South Western Baltic Sea Trans Regional Area Implementing New Geography

Main purpose of the stakeholder analysis

The main purpose of the stakeholder analysis is to obtain an idea of the expectations to how tourism will develop in the coming years, of the various partners and stakeholders within the Fehmarnbelt region; and to identify key areas for tourism potentials.

The results of the analysis will, together with a number of other analyses, form the basis for the Building Tourism strategy.

Geographical area included in the survey

The regions included in the Building Tourism strategy are: The Region Scania, The Capital Region of Copenhagen, Region Zealand, Hamburg Metropolis, and Schleswig Holstein Region.

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1. Introduction (cont.)

Methodology

The stakeholder analysis is carried out as an online questionnaire based survey, using the survey system Enalyzer. Each of the five regions have identified approximately 200 main stakeholders from their respective regions. Each stakeholder has received an e-mail with a link to the survey.

In total 1009 stakeholders have received an e-mail, and 438 respondents have completed the survey, which is equivalent to a response rate of 43%.

The sample is divided across the region with 10% being from the Schleswig Holstein region, 14% from Hamburg Metropolis, 21% from Region Scania, 26% from the Capital Region of Copenhagen and 29% from Region Zealand. Compared to the total population of the 1009 stakeholders, the German respondents are slightly underrepresented and the Danish respondents slightly overrepresented.

Where relevant, the findings of the analysis have been correlated with the three different nationalities in order to highlight national differences and preferences.

It should be noted that not all respondents have answered all questions, hence the sample varies in size from question to question.

About the analysis

The stakeholder analysis has been carried out by Wonderful Copenhagen's department for Research & Development, by Senior Advisor Lone Alletorp Callard for STRING and Femern A/S and partners in the Building Tourism network.

2. Main conclusions

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2. Main conclusions

The main findings of the Stakeholder analysis are summarized below in bullet points.

The strongest sense of belonging is found among the Swedish respondents

- Only 39% of all respondents feel that Scania belongs to the Fehmarnbelt region, however, 80% of the Swedish respondents feel Scania belongs to the region.
- 61% of all respondents feel ‘to some extent’ or ‘very much’ associated with/part of the Fehmarnbelt region. The strongest sense of belonging is found among the Swedish respondents (68%).

The link is included in ¼ of the strategic plans

- The Fehmarnbelt fixed link and the consequences and/or potentials are included in 26% of the respondents’ current strategic plan for the future.

Almost 2 out of 3 believe in an increased tourism potential

- 73% of all the respondents believe the change to infrastructure and accessibility generated by the link has ‘very much potential’ or ‘some potential’ for increased market potential to their organization.
- Particularly the Swedish respondents (90%) believe the fixed link will have an increased market potential.

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2. Main conclusions (cont.)

Tourism <u>turnover</u> is expected to increase in the future

- Overall tourism turnover is expected to increase in all the predefined segments (except the Cruise segment) both in the coming 2-3 years and once the fixed link has been established in (expected) 2012. (The segments are defined as: One day visitors, Nature/Wildlife, Sea & beach holiday, Event segment, Cruise, City break, Business segment).
- Tourism turnover is expected to increase more after the fixed link has been established in 2012 compared to the expectations for the coming 2-3 years.
- The highest increase in turnover is expected in the 'City Break' segment, and the 'One day visitor' segment.
- The least increase in turnover is expected in the 'Cruise segment' followed by the 'Sea & Beach holiday' segment.

Tourist <u>arrivals</u> are expected to increase in the future

- Overall tourist arrivals are expected to increase from all source markets, both in the coming 2-3 years and once the fixed link has been established. (The source markets listed are: the German market, the Swedish market, the Danish market, other markets).
- Tourist arrivals from all source markets are expected to increase more after the fixed link has been established compared to expectations for the coming 2-3 years.
- The highest increase in tourist arrivals once the fixed link has been established is expected from the German source market.
- It is particularly the Danish and Swedish respondents that are expecting an increase in the German market, whilst the German respondents are expecting the highest increase to come from the Danish source market.

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2. Main conclusions (cont.)

Key 'unique selling points' (open ended questions)

All respondents were asked how their respective region(s) should be sold in the other Fehmarnbelt regions. E.g. Danish respondents were asked "*How should the Danish regions be sold in Germany?".*

Below are listed the three most frequently mentioned key words/unique selling points for each region/country.

For each country all the key words mentioned are, furthermore, summarized to one sentence describing the unique selling point.

How should Danish destinations be sold in Germany?

- Recreation/tranquility/recharge batteries
- Nature / outdoor life
- Cultural heritage (incl. Vikings, history)

"Recharge your batteries in the Danish nature"

How should the Swedish destinations be sold in Germany?

- Nature/wildlife/forests
- Proximity/accessibility
- Green/clean/sustainable

"Free nature and easily accessible"

How should the German destinations be sold in Denmark and Sweden?

- Value for money (cheap, good quality)
- Shared history / cultural heritage
- Shopping/urban/cities

"Shopping and good value for money"

Joint characteristic of the Fehmarnbelt region (predefined response categories):

Joint characteristics that most respondents identify with (in brackets percentage of respondents):

- Coastal line/water/beaches (89%)
- Green sustainability (62%)
- Nature/wildlife (59%)
- Cultural heritage (52%)

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3. Sense of belonging to the Fehmarnbelt region

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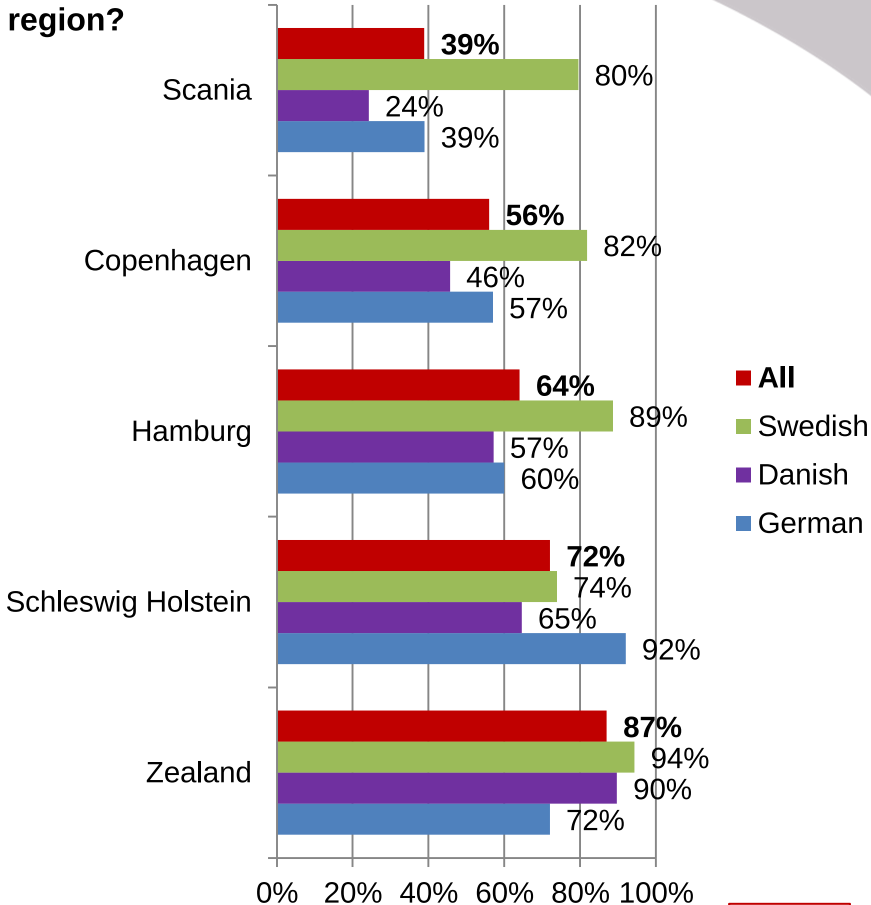
Only 39% feel Scania belong to the region

Whilst as many as 87% of all respondents feel that the Region Zealand belongs to the Fehmarnbelt region, perhaps not surprisingly only 39% feel that Scania belongs to the Fehmarnbelt region.

However, when looking at the results divided by country as many as 80% of the Swedish respondents feel Scania belongs to the Fehmarnbelt region, whilst only 24% and 39% respectively of the Danish and German respondents feel Scania belongs to the Fehmarnbelt region. Hence, it is not the Swedish respondents that feel Scania does not belong to the Fehmarnbelt region but the other nationalities.

The sense of belonging to the Fehmarnbelt region varies a great deal from region to region and nationality to nationality. Although 90% of the Danish respondents feel Region Zealand belongs to the Fehmarnbelt region, only 46% feel Copenhagen belongs to the Fehmarnbelt region. Among the German respondents 92% feel Schleswig Holstein belongs to the region, whilst less (60%) feel Hamburg Metropolis belongs the region.

Which region do you feel belongs to the Fehmarnbelt region?



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3. Sense of belonging to the Fehmarnbelt region

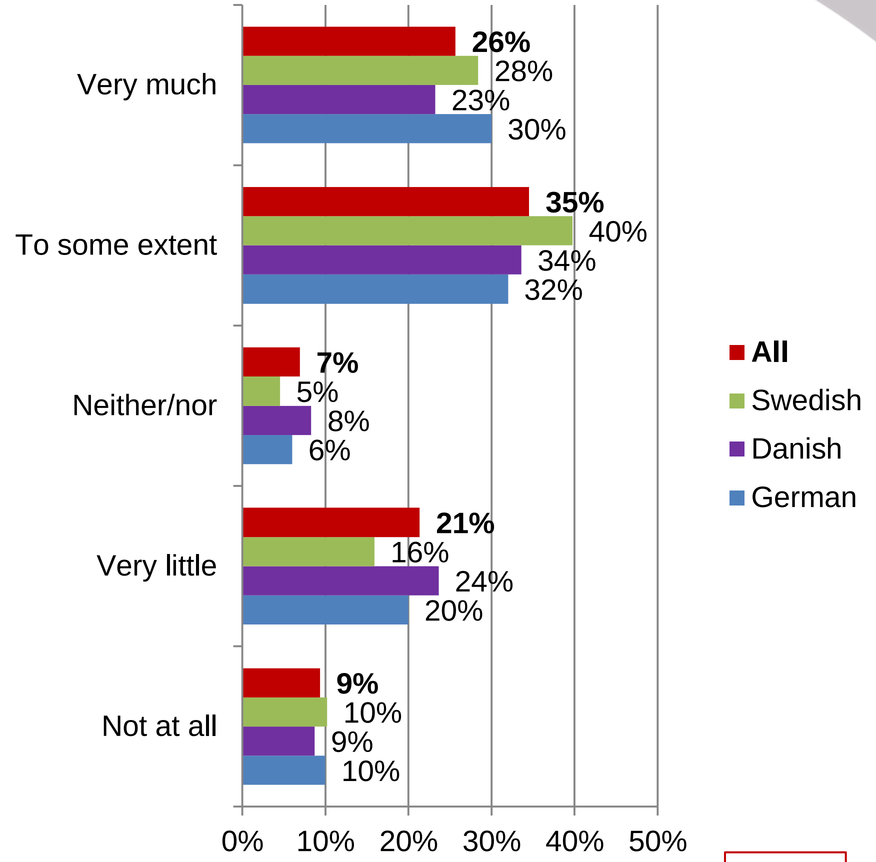
61% feel associated with the region

As many as 61% feel 'to some extent' or 'very much' associated with/part of the Fehmarnbelt region. Approximately one out of five (21%) feels very little association with the region, whilst 9% feel not at all associated with the Fehmarnbelt region.

Strongest sense of belonging among Swedish respondents

Looking at the results divided by country, again the Swedish respondents feel a stronger sense of belonging to the Fehmarnbelt region, compared to the Danish and German respondents. The Danish respondents feel the least sense of belonging to the Fehmarnbelt region.

Do you/your organisation feel associated with the Fehmarnbelt region?



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4. Tourism potentials & barriers

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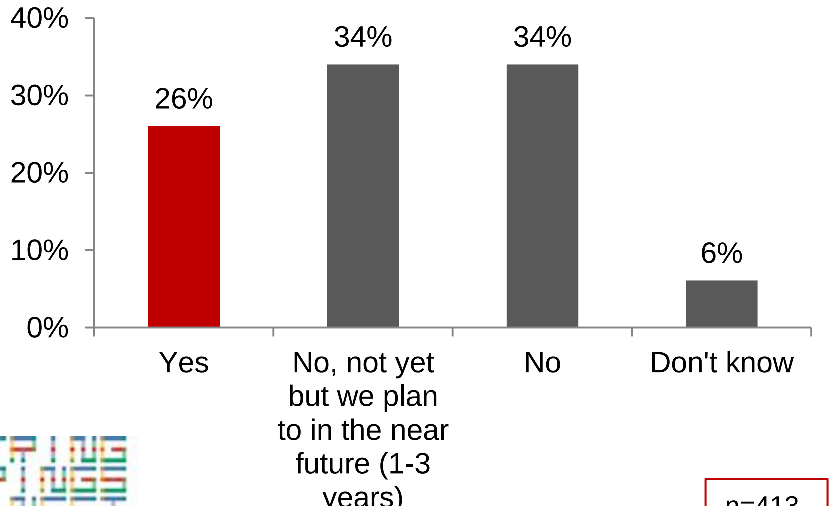
4. Current partnerships

The link is included in ¼ of the strategic plans

The Fehmarnbelt fixed link and the consequences and/or potentials are included in 26% of the respondents' current strategic plan for the future. There are no significant nationality differences, however overall the German organisations are slightly more likely to have implemented the fixed link and it' consequences in their strategic plan.

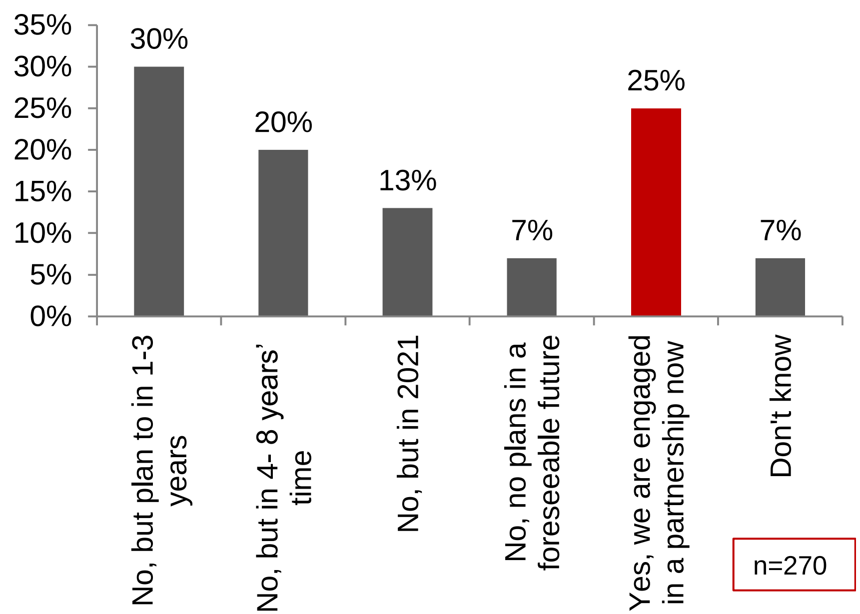
Are the fixed link and potentials included in your current strategic plan for the future?



25% are engaged in partnerships

Of the ones stating "yes" or "plan to in the future" to include the potential of the fixed link in their strategic plan, 25% are already engaged in a partnership with the aim of benefiting from the increased tourism potential. A further 30% plan to in the next 1-3 years' time.

Engagement in partnerships with the aim to benefit from the increased tourism potential



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4. Current partnerships

Current partnerships

The respondents (n=63) that stated " Yes, we are engaged in a partnership now with the view to benefit from the fixed link" were asked to state the name of the partnership they are engaged in.

The partnerships mentioned most frequently are: STRING, Fehmarn Belt Committee and Destination Fehmarnbelt.

Other partnerships:

All the regional and national tourist organisations/boards are also mentioned by some respondents, e.g. Wonderful Copenhagen, Ostsee-Holstein Tourismus, Østdansk turisme. These are, however, not exactly partnerships established to benefit from the Fehmarnbelt fixed link, although they most likely will be engaged in activities with the aim to benefit from the fixed link. Likewise the national hotel/tourism trade associations are mentioned, e.g. HORESTA (Hotel and restaurant association in Denmark) and DAHOGA (German Hotel association).

Current partnerships with the aim to benefit from the fixed link:

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Fehmarn Belt Committee
Destination Fehmarnbelt
Fehmarn Belt Forum
Building Tourism
KulturLINK
Öresund Event Centre
Baltic Sailing
Panorama: Powered by Cycling
BeltScience
Event Scania

4. Tourism potential

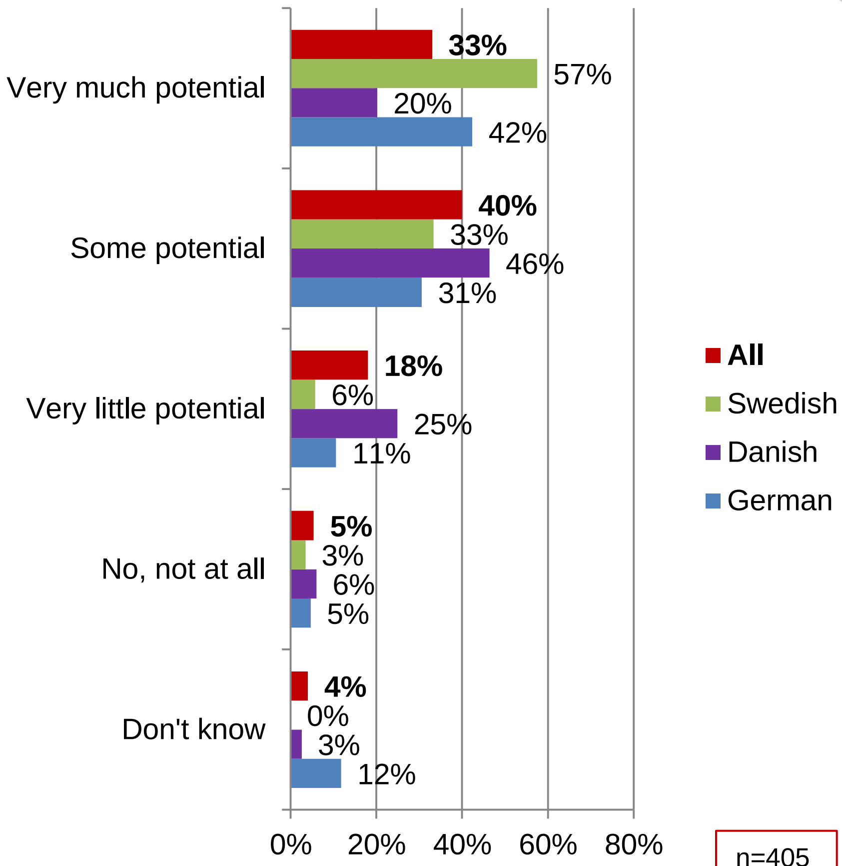
Almost 2 out of 3 believe in an increased tourism potential

73% of all the respondents believe the change to infrastructure and accessibility generated by the link has ‘very much potential’ or ‘some potential’ for increased market potential to their organisation. 18% of the respondents state ‘very little potential’.

Particularly, the Swedish respondent believe the fixed link will have an increased market potential. As many as 90% state that the link will have ‘very much’ or ‘some potential’ for their organisation.

In comparison this is only the case for 66% of the Danish respondents and 73% of the German respondents. Overall the Danish respondents believe the least in an increased market potential.

Do you believe the link will have an increased market potential for your organisation?



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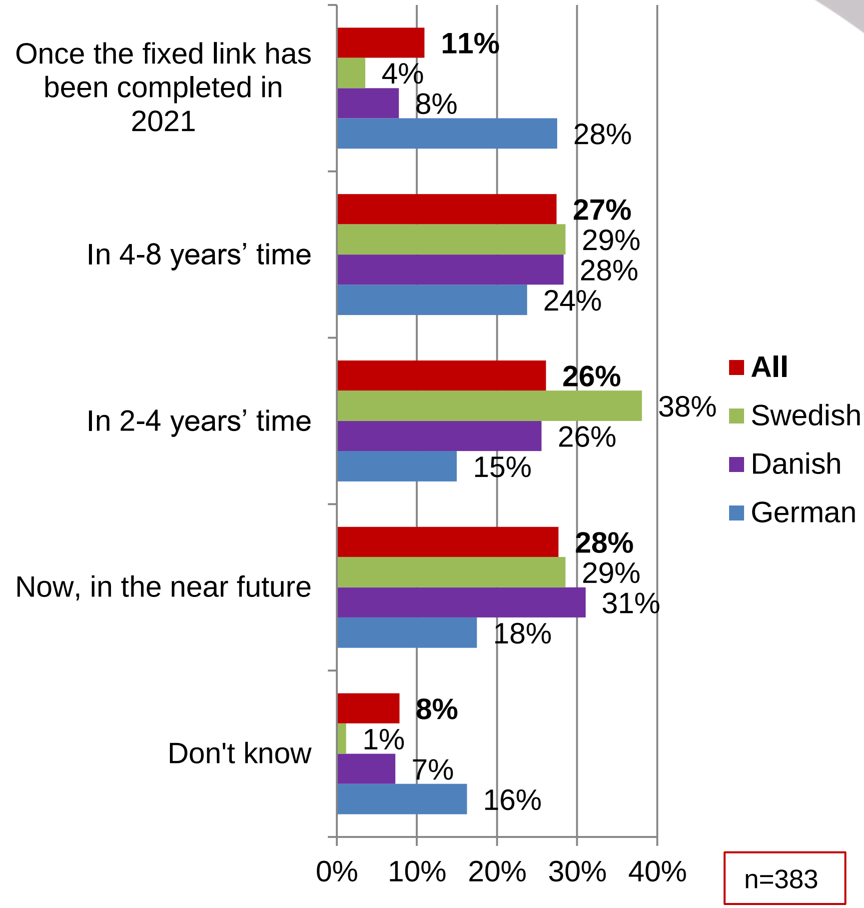
4. New initiatives

New initiatives should be taken now or within the next couple of years

Of those respondents believing that there is an increased market potential (small or big), 28% believe new initiatives to benefit from the increased market potential in their region should be taken 'Now, in the near future', whilst 26% believe new initiatives should be taken within 2-4 years' time. Hence, more than half (54%) believe new initiatives should be taken now or within the next 2-4 years.

Looking at the results divided by country 28% of the German respondents, believe that initiatives to benefit from the increased market potential should not be initiated before the fixed link has been completed in 2021. This is a considerably lower share of respondents compared to the Swedish (4%) and Danish (8%) respondents expressing the same views.

When do you believe new initiatives should be taken to benefit from the increased market potential?



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4. Reason for ‘no’ or ‘little’ market potential

The link will result in increased competition

Respondents (n=18) stating that they do not believe the fixed link will have an increased market potential for their organisation state the following reasons:

- **Increased competition** (e.g. prices are lower in Germany, increased competition from the metropolises)
- **Location** – too far away from the direct traffic corridor (e.g. North Zealand)
- **Target groups use other means of transport** (e.g. flights)
- **Focusing mainly on the domestic source market** (few international visitors)

”Det är snarare att ses som en konkurrent till Trelleborg och det blir nog mer en omväg att ta sig hit”

””Billetpriserne og omkostninger er generelt meget lavere til kulturarrangementer herunder koncerter i Tyskland”

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4. Main barriers for achieving an increased market potential

Lack of destination knowledge is a key issue

On a list of predefined possible barriers, respondents were asked to state to which degree they disagreed or agreed that the statements listed are barriers.

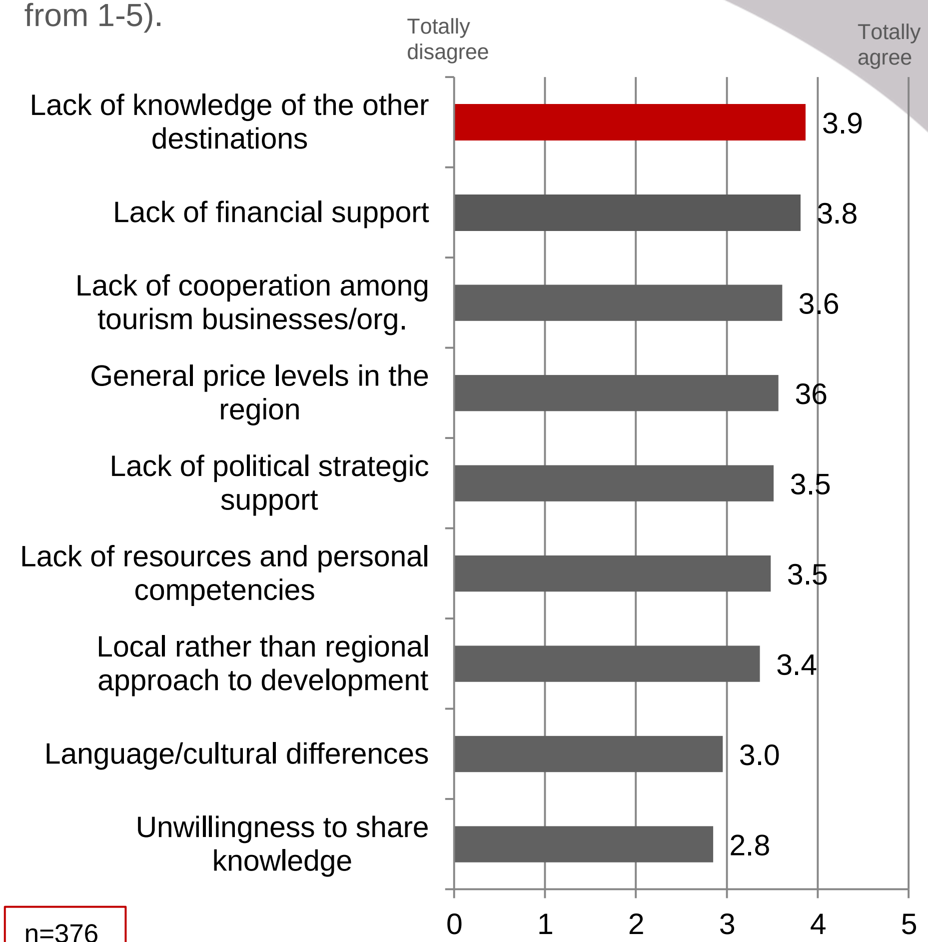
The barrier that most respondents agree with is, (with a score of 3,87), 'Lack of knowledge of the other destinations in the Fehmarnbelt region', followed by 'Lack of financial support' (3,81). (NB: see grey box below)

Looking at the nationality division, it is particularly the Swedish respondents, (with a score of 4,01), that believe that 'lack of knowledge' is the main barrier, whilst both the Danish and German respondents, (with a score of 3,89 and 3,95 respectively), believe that 'lack of financial support' is the main barrier.

All nationalities agree that 'unwillingness to share knowledge' is the least significant barrier.

None of the barriers listed scores very high (4 or above), hence the respondents overall do not believe these barrier are significant barriers for achieving the increased market potential.

Main barriers for achieving increased potential (on a scale from 1-5).



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5. Expectations to growth

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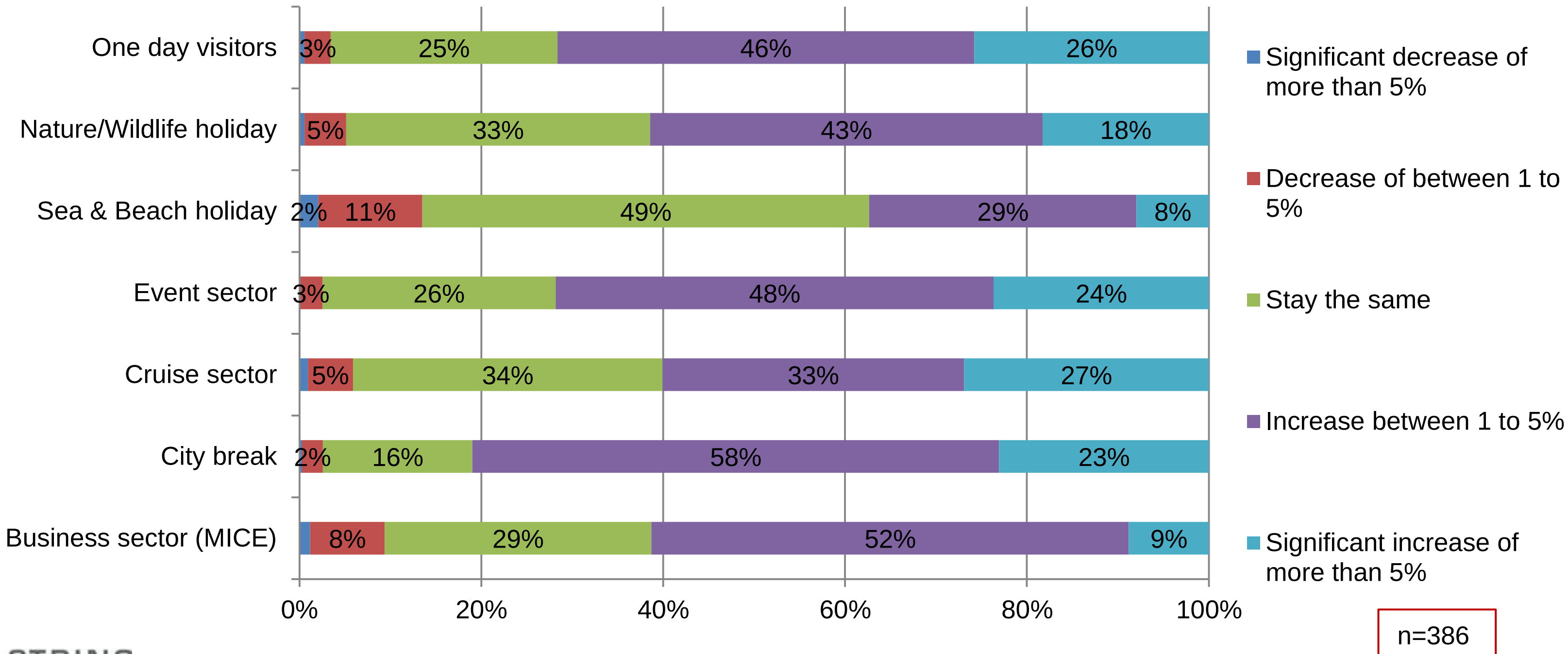
5. Expectations to growth in tourism turnover in 2–3 years

- Expectations to growth in turnover in the coming 2-3 years among the respondents are highest within the ‘City break’ segment, 81% expect turnover to increase in this segment, followed by the ‘Event’ segment and ‘One day visitors’. Turnover in both segments are expected to grow by 72% of the respondents.
- The least increase in turnover is expected in the ‘Sea & Beach holiday’ segment, only 37% expect a growth in turnover in this segment. It is also in this segment, the biggest decrease in turnover is expected.
- Overall the Danish respondents expect less growth in turnover in the different segments compared to the Swedish and German respondents. The Swedish respondents are overall most positive.

State for each segment the expected de/increase in tourism turnover in your region in 2-3 years time



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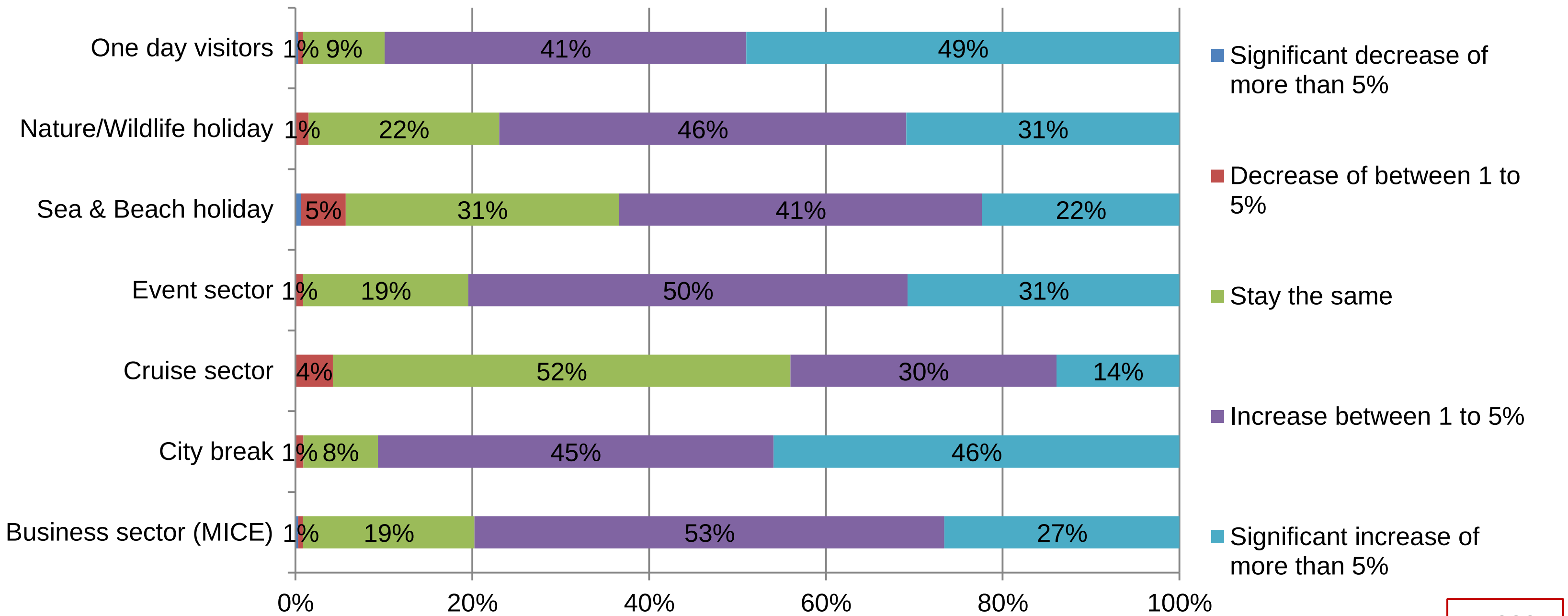
The category “Don’t know” has been deducted from the results

5. Expectations to growth in tourism turnover after 2021

- Overall expectations to growth in turnover after 2021 are higher compared to the expectations to growth in 2 to 3 years time.
- Expectations among respondents to growth in turnover after 2021 are highest within the 'City break' segment and the 'One day visitors'. Turnover in these segments are expecting to grow by respectively 91% and 90% of all respondents, followed by the 'Event' segment and 'Business' segments, with 80% of the respondents expecting turnover in these segments to grow.
- For the 'City break' segment and the 'One day visitors' growth in turnover is expected to be of more than 5% by almost half of the respondents (respectively 46% and 49%).
- Turnover in the 'Cruise' segment is expected to grow the least, 44% expect a growth in turnover in this segment, followed by 'Sea & Beach holiday' (63%). The 'Sea & Beach holiday' segment is also the segment where turnover is expected to decrease the most.
- The Swedish respondents are again overall most positive.

State for each sector the expected de/increase in tourism turnover in your region in 2021 post the fixed link



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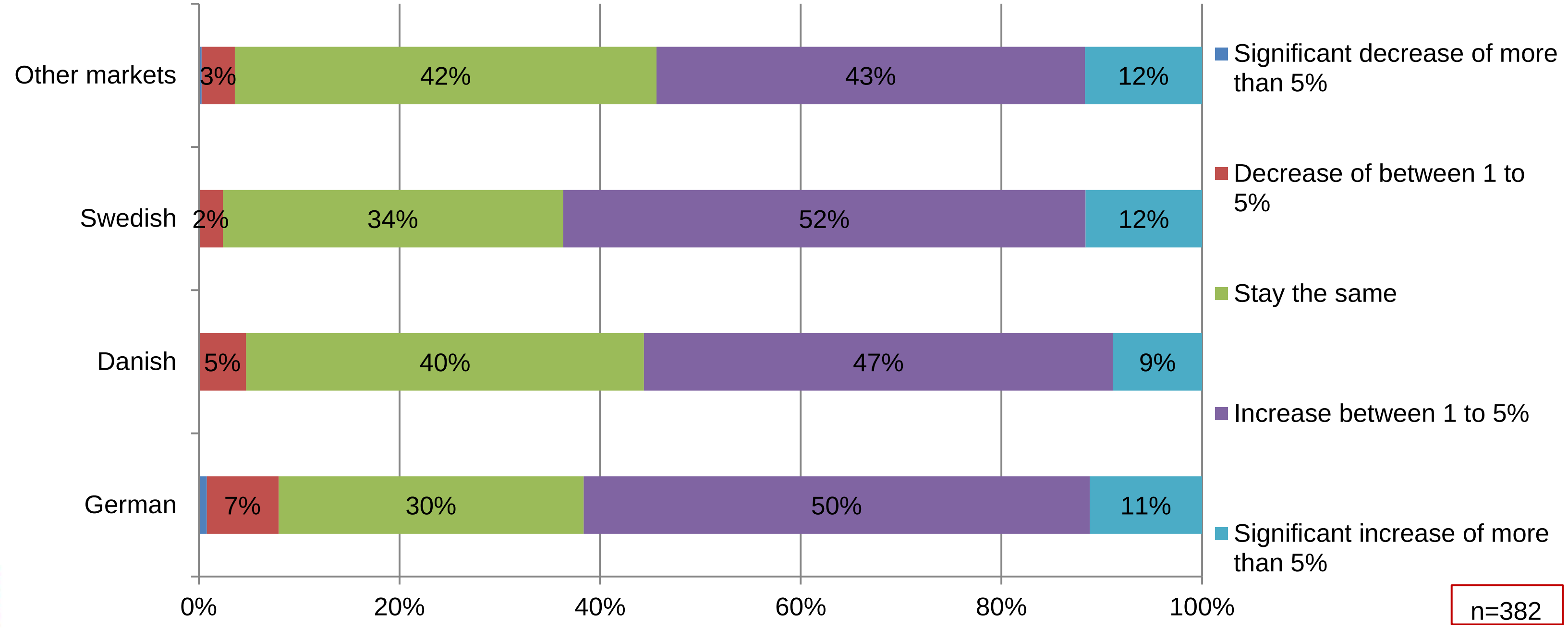
The category "Don't know" has been deducted from the results

5. Expectations to growth in tourism arrivals in 2-3 years

- The biggest increase in tourist arrivals in the coming 2-3 years is expected to come from the 'Swedish' and ''German' source markets, with respectively 64% and 62% expecting an increase in arrivals in those two markets.
- It is particularly the Swedish and German respondents (respectively 76% and 72%) that expects a growth in arrivals from the German market, whilst approximately half (53%) of the Danish respondents expect a growth in arrivals from this market, 12% in fact expect a decrease.
- The highest increase in Swedish arrivals is expected by the Swedish respondents (70%). Generally, the Swedish respondents expect the highest growth in arrivals from each of the markets.
- Approximately half (49%) of the Danish respondents expect the Danish (domestic) market to stay the same, whilst 53% expect arrivals to grow. In comparison respectively 76% and 72% of the Swedish and German respondents expect Danish arrivals to increase..

State for each source market the expected de/increase in tourist arrivals in your region in 2-3 years time



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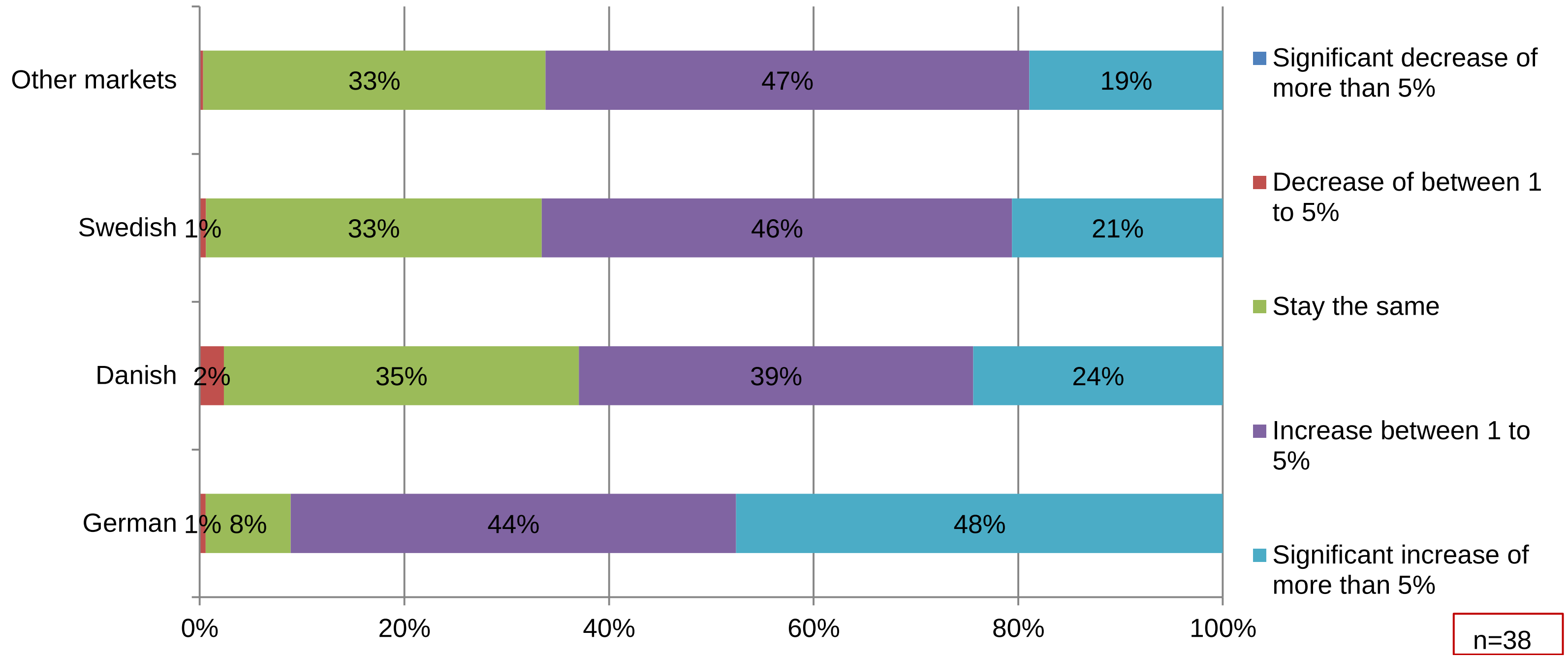
The category "Don't know" has been deducted from the results

5. Expectations to growth in tourism arrivals after 2021

- Overall expectations to growth in arrivals after 2021 are higher compared to the expectations to growth in 2 to 3 years time.
- The biggest increase in tourist arrivals after the fixed link has been established, is expected to come from the German source market, with 91% expecting an increase, followed by the Swedish and Danish markets (67% and 66% respectively).
- Not surprisingly, it is particularly the Danish and Swedish respondents that are expecting an increase in arrivals from the German market, whilst the German respondents are expecting the biggest increase to come from the Swedish and Danish source markets.
- 35% and 33% respectively expect the Danish and Swedish markets to remain the same, whilst only 8% expect the German market to remain the same. Very few respondents expect any decrease whatsoever.

State for each source market the expected de/increase in tourist arrivals in your region in 2021 post the fixed link



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The category "Don't know" has been deducted from the results

6. Unique selling points

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6. How should Danish destinations be sold in Germany?

Recharge your batteries in the Danish nature

All Danish respondents (n=155) were asked to list 3 key words/unique selling points describing how they think the Danish regions should be sold in Germany. See list opposite. Most frequently mentioned are themes relating to ‘recreation’, ‘Danish nature’ and ‘cultural heritage’.

Below are listed a few quotations from respondents.

”Never far to the next experience”

”Water, action and attractions”

”The happiest people in the world invites you to join the party”

Main ‘Unique selling points’ summarized and in order of frequency:

- Recreation/tranquility/recharge batteries
- Nature / outdoor life
- Cultural heritage (incl. Vikings, history)
- Coastline/beaches/water
- Green/sustainability
- Everything is close by
- The Danish way/way of living/openness
- ‘Hygge’ - coziness
- City break/urban environment/Copenhagen
- ‘Taste of Denmark’/local food experience
- Plenty of space
- Authenticity
- Safe destination

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6. How should Swedish destinations be sold in Germany?

Free nature and easily accessible

All Swedish respondents (n=66) were asked to list 3 key words/unique selling point describing how they think the Swedish region should be sold in Germany. See list opposite. Most frequently mentioned are themes relating to ‘the Swedish wildlife and nature’.

Below are listed a few quotations from respondents.

” Proximity - city / sea / nature within short distances”

”Free nature, easily accessible, not touristic”

” Scenic environment combined with culture and city life”

Main ‘Unique selling points’ summarized and in order of frequency:

- Nature/wildlife/forests
- Proximity/accessibility
- Green/clean/sustainable
- Cultural heritage (incl. Vikings)
- Plenty of space
- Local food
- Quality of life
- Recreation/tranquility

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6. How should German destinations be sold in Denmark and Sweden?

Shopping and good value for money

All German respondents (n=56) were asked to list 3 key words/unique selling point describing how they think the German regions should be sold in Denmark and Sweden. See list opposite. Most frequently mentioned are themes relating to 'value for money', 'shopping', but also the 'shared history' with particularly Denmark is mentioned often. Below are listed a few quotations from respondents.

" Value for money / health region"
"More than just transit and border shops"

"Good value / quality / growing economic presence"

" Baltic Sea coast with spectacular hinterland, shared history, good German food"

Main 'Unique selling points' summarized and in order of frequency:

- Value for money (cheap, good quality)
- Shared history / cultural heritage
- Shopping/urban/cities
- Wellness/health tourism
- Events and markets (e.g. sporting events, Christmas markets in Hamburg)
- Baltic sea
- Culinary experiences
- Lüneburger Heide
- Leisure resorts

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6. Joint characteristics/themes identified

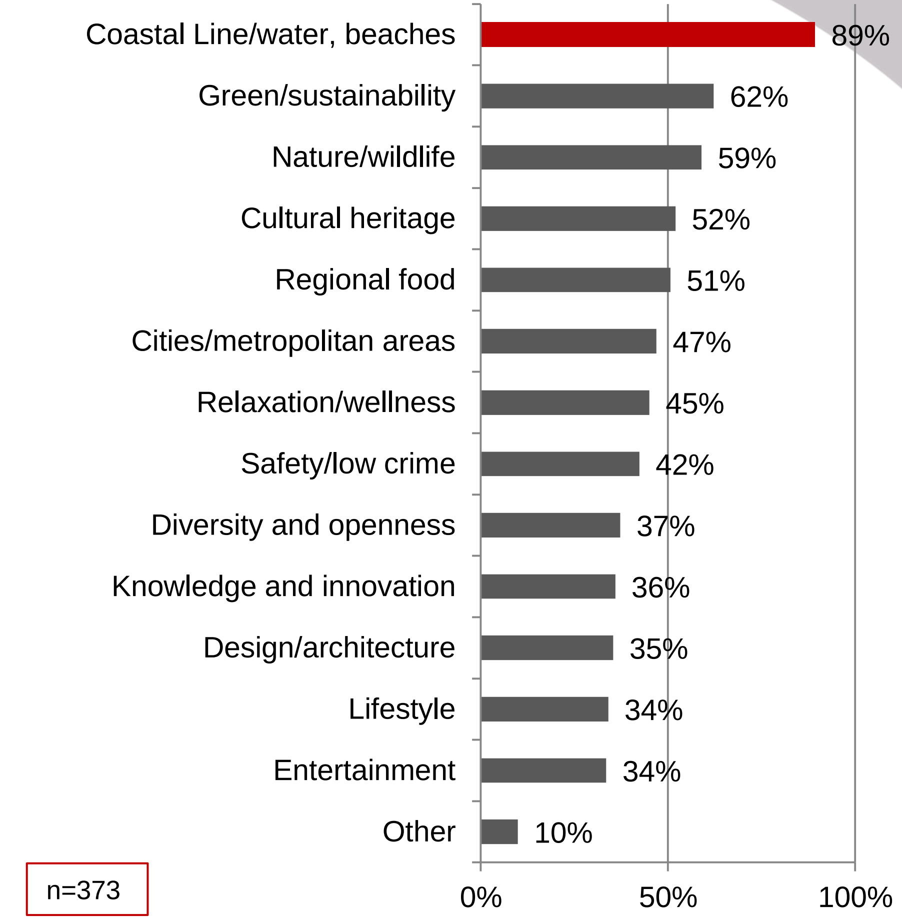
Water binds the region together

On a predefined list of joint characteristics of the Fehmarnbelt region, the majority by far (89%) have identified ‘Coastal line/water/beaches’ as a main joint characteristic of the Fehmarnbelt region, followed by ‘Green/sustainability’ (62%). Merely 34% respectively regard ‘Entertainment’ and ‘Lifestyle’ as joint characteristics of the region.

Other characteristics mentioned under ‘Other’ are: ‘ Culture/supply of culture, shared Baltic history, shared values, health, sport/sport events, festivals, outdoor activities.

Looking at the nationality division, the Swedish respondents (67%), regard ‘Nature/wildlife’ to be the main joint characteristic of the region. ‘Knowledge and innovation’ is by the Swedish respondents (54%) also regarded somewhat higher compared to the Danish (31%) and German (29%) respondents. ‘Cities/metropolitan area’ is regarded a key joint characteristic by the German (59%) and Swedish (63%) respondents but not by the Danish respondents (37%) in comparison.

Joint characteristic of the Fehmarnbelt region



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7. Future fields of cooperation

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7. Future fields of cooperation

Future fields of cooperation

All respondents were asked to state their expectations to or concrete suggestions for future fields of corporation. One of the main fields for cooperation lies within packed themed tours and also partnerships regarding the regions shared cultural history.

Another obvious field for corporation seems to be joint product development and destination marketing of cross-border coastal tourism.

The suggestions from 150 respondents are summarized and listed opposite and on the following page.

Suggestions for future fields of cooperation:

- Packaged tours (e.g. combination of nature-based activities, accommodation and food)
- Themed routes e.g. Viking routes, nature trails, food/gastronomy routes.
- A strategic partnership relating to the shared cultural history, involving museums, events (e.g. Golden Days) accommodation facilities and restaurants.
- Joint product development and marketing of cross border coastal products/ experiences
- Coastal activities/experiences (involving fishing, boating, canoeing-kayaking, surfing etc.)
- Attracting / developing cross-border events
- Bike-hiking tourism
- Nature based activities - guided tours with accommodation
- Increased focus on market trends – e.g. within the filed of active life and recreation

7. Future fields of cooperation (cont.)

Future fields of cooperation (cont):

- Joint marketing campaigns
- Northern Europe interrail card or travel card
- Joint tourism vision/ strategy for the whole Fehmarnbelt region
- Focus on regional food coupled with culinary experiences (for citizens and guests)
- Increased emphasis on culture as one of the important levers in the region and to create a cohesive force
- MICE Project 'the Nordic metropolises' with Hamburg and Copenhagen in focus
- Establishment of a joint Nordic/Northern European tourism office / organisation with clear objectives focusing on the region's strengths: coastal areas, Metropolises, sustainability/green initiatives, MICE
- Partnerships relating to modern cultural experiences (e.g. festivals) / Cooperation between festivals / cultural contemporary experiences
- More information available in all three language (for tourists and citizens)
- Greater exchange of labor and close cooperation between educational institutions, in order to get a better knowledge of the others regions and subsequently a more integrated labor market
- Development of joint cruise tourism
- Increased local/regional political support

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