Catch
Coastal Angling Tourism
A Development Chance for the South Baltic Region

Interreg South Baltic

EUROPEAN UNION

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The CATCH Angler Survey Report

Understanding Anglers from the South Baltic Region and Their Demands on Coastal Angling Tourism

Lead Partner:

Universität Rostock

Project Partners:

EUCC-D

FEDERACJA ZIELONYCH GAJA

AGILA

KLAIPĖDOS UNIVERSITETAS

VORDINGBORG KOMMUNE

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1 Coastal Angling Tourism and the CATCH Survey

Coastal angling tourism offers a unique development possibility for the South Baltic Region. Coastal regions, especially those that are less developed, can profit from this year-round tourist trend by making use of its diversification, market opportunities and the cooperation of stakeholders and diverse industries. Though coastal angling tourism is still a niche market supported by mainly regional initiatives and angler-to-angler communication, the potential and opportunities of coastal angling tourism are evident.

Coastal angling has gained continuously in importance over the years, reaching a total annual economic activity of €10.5 bn in Europe (direct: €5.1 bn, indirect: €2.3 bn, induced: €3.2 bn). With 9 million anglers and 77.6 million angling days, recreational coastal angling provides almost 100,000 jobs (Hyder et al., 2017). The contribution of the Baltic Seas amounts to up to 15% of this overall European economic activity. The numbers from the South Baltic Region, including inter alia Denmark, Germany, Lithuania and Poland, illustrate that the effect of coastal angling on production and employment is not to be underestimated[1] and its potential is not yet exhausted by far.

Estimated numbers of recreational coastal anglers are 45,000 in Denmark, 165,000 in Germany, 80,000 in Poland and 60,000 in the Baltic States who go angling by the Baltic Sea (VDSF, cited by Spahn, 2016). Information provided by the Baltic Marine Environment Protection Commission (HELCOM, 2015) illustrates that the number of anglers in Denmark and Germany has remained stable over the last few years, whereas in Poland and Lithuania the relevance of recreational angling and with that the number of anglers have increased significantly. The availability of further data on recreational anglers is limited and primarily includes, if at all, catches, targeted species and allowed types of equipment for each country (HELCOM, 2015).

[1] Production (million €): Baltic Sea: 1,558, DK: ~125, DE: 150, LT: 26, PL: 39.
Employment (full-time equivalent): Baltic Sea: 14,473, DK: ~900, DE: ~1,700, LT: 586, PL: 433.
Source: EURecFish, in Hyder et al., 2017.

To exploit the economic potential of coastal angling tourism, cross-border initiatives and cooperation become necessary. Therefore, the EU project CATCH aims to promote recreational coastal angling across borders by providing coastal communities with tools to establish sustainable angling tourism, defining inspiring best practices and fostering exchange and cooperation between stakeholders, as well as by establishing a multilingual information and knowledge platform on coastal angling tourism for locals and tourists. National and cross-border stakeholder workshops in addition to market analyses of both the demand and the provider side in the four partner countries, Denmark, Germany, Lithuania and Poland, form the basis for these objectives.

To date, data regarding anglers' behaviours and expectations has been rather scarce and only limited research has been conducted at a cross-border level. As part of CATCH, an angler survey was conducted with the aim of identifying characteristics, preferences and demands of anglers at a national as well as international level. In combination with findings from previous studies, this new data will be used to extend knowledge on anglers in the South Baltic Region. Details on the content, methodology and findings of the angler survey are covered in the following paragraphs.

2 General Information on the Survey

2.1 Content Specifications

The survey was directed at anglers with previous experience of coastal angling tourism. This means that in order to participate in the survey, anglers should have spent at least one day trip, short holiday (1–4 overnight stays) or main holiday (≥5 overnight stays) with the main objective of coastal angling (including angling from a boat in coastal waters).

Anglers were asked to answer questions about their previous experiences of coastal angling trips or holidays, as well as about general preferences and demands when planning and going on these trips. The questionnaire covered the following nine sections:

- Demographic information of participating anglers
- Angling habits
- General travel behaviour and travelling habits of anglers
- Preparation and organization of travel activities
- Travel arrangements for trips and holidays
- Opinions on angling guides
- Buying behaviour, loss and replacement of angling gear
- Motivations for and boundaries to going angling
- Reports on recent angling trips and holidays

2.2 Methodology

The angler survey was made available in five languages: English, Danish, German, Lithuanian and Polish. A consistent translation throughout all national questionnaires was assured by the project partners. In order to reach a high number of participants, the questionnaire was disseminated both online as a survey link via emails to contacts, social media websites and further associated websites (in all four partner countries), as well as offline via paper questionnaires (Lithuania, Poland). Distribution methods for spreading the questionnaire

differed between countries due to the varying online affinities of anglers in Lithuania and Poland.

Anglers participated in either the online or offline surveys between 10 February and 30 April 2017. In total, 757 completed questionnaires were gathered:

- Denmark: 206 (online only)
- Germany: 203 (online only)
- Lithuania: 221 (online: 71; offline: 150)
- Poland: 127 (online: 52; offline: 75)

Anglers were presented with a series of questions in each section of the questionnaire. The design of the questions varied according to the information requested. Simple information including, for instance, demographic variables and details of previous holidays and experiences were collected via open written answers or questions with check boxes. The preferences of the surveyed anglers were identified by asking anglers to indicate their Top 5 answers, starting with 1 (most relevant) to 5 (least relevant). The cumulation of participants' answers resulted in overall rankings.

Questionnaires were analysed at both international and national levels. This allowed for a general overview of characteristics, preferences and demands of anglers in the South Baltic Region, and for a more detailed analysis for each partner country, coupled with a comparative analysis of these countries. The analyses also controlled for an influence of the distribution channel, but no significant differences between the results of online and offline questionnaires were found.

3 Findings of the CATCH Angler Survey

This report covers all the information gathered via the CATCH angler survey. The findings are presented in a descriptive way and reflect the results of the survey. The results again raise no claim to completeness or to being generalizable to all anglers in the South Baltic Region. Rather, they outline a small proportion of the potential information that can be obtained from anglers in the project region.

Regardless, the data collected by this angler survey provides not previously existing cross-border insights into the habits, preferences and demands of anglers in the South Baltic Region, which can be used as a basis for the future development of suitable and satisfying travel offers for anglers at an international level.

The following paragraphs illustrate the findings of all nine sections of the CATCH angler survey and illustrate both commonalities and differences between the four partner countries, Denmark, Germany, Lithuania and Poland. Each section comprises an individual set of questions, ensuring a more detailed understanding of anglers from the South Baltic Region.

3.1 Who Participated in the CATCH Survey?

In total, 757 anglers participated in the CATCH angler survey. The initial analysis of participants' demographic information revealed a similar distribution of characteristics among all participating countries. Only minor differences were found in education and job status.

In detail, 93.6% of participants were male and the age range varied from 16 to 81 years (mean = 45 years). The majority of participants were highly educated, with half of them holding a university degree (50.8%). More than half of the participants worked as full-time employees (58.6%), 17.3% were self-employed and only 8.8% retired. In addition, more than 80% of the participants were in a relationship, and 57% were married. The number of children in surveyed anglers' households ranged between 0 and 4, with an average number of 1 child per household. Participants' residences were located from directly at the coast up to a distance of 1,000 km from the coast. A more detailed overview of participants' demographic

characteristics is shown in Figure 1 (For more information at a national level, see Figures A1–A4 in the Appendix.)

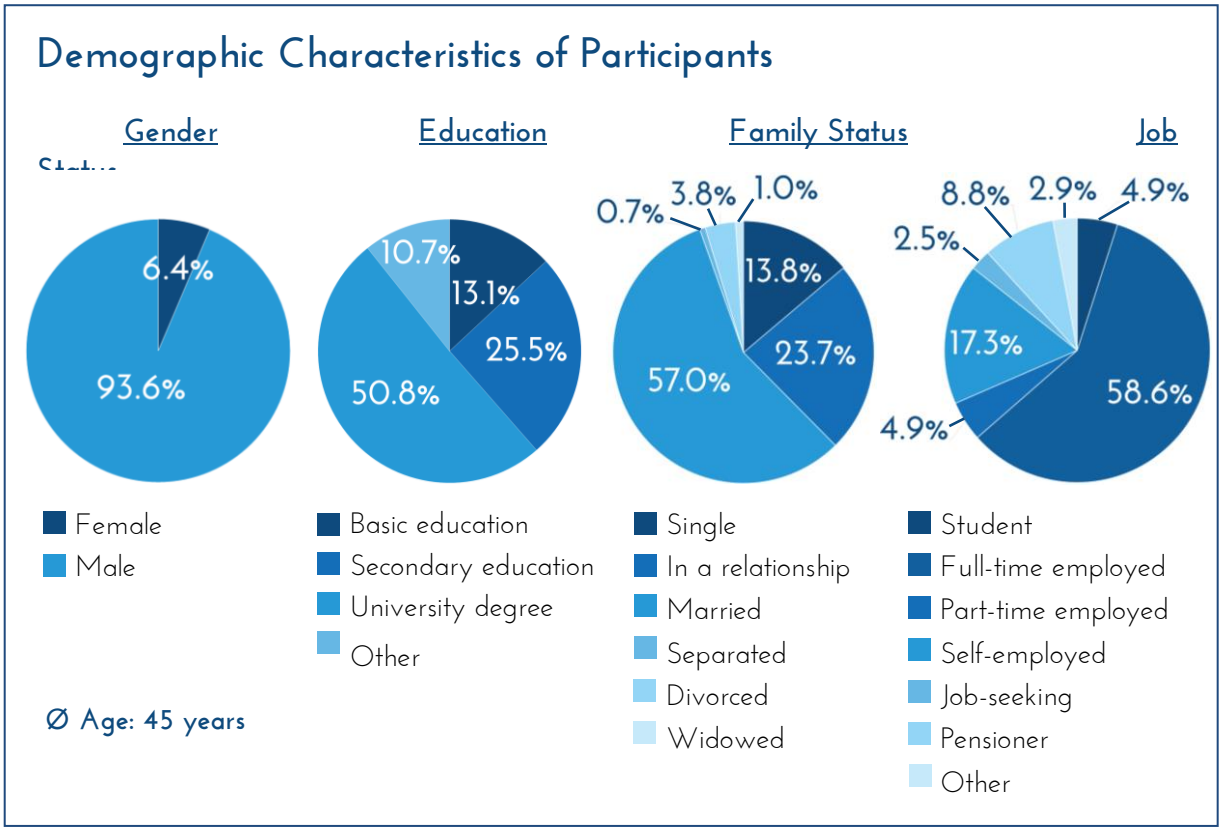


Figure 1: Demographic Characteristics of Participants

3.2 Participating Anglers and Their Habits

Surveyed anglers were asked about their angling experience and what type of angler they would assess themselves as being based on their angling habits. In addition, participants were questioned on favoured angling techniques as well as favoured fish species in home waters and at holiday destinations.

Angling Experience

The specified experience of surveyed anglers varies across nationalities. Participants in Denmark hold the highest number of years of angling experience (Ø 34 years). Only 8% of Danish participants have gone angling for less than 10 years. Instead, 66% reported an angling

experience of more than 30 years. German participants hold a slightly lower number of years of angling experience, with an average of 27 years. A large percentage of surveyed German anglers, however, also have more than 30 years of experience (41%). Lithuanian participants hold on average 10 years less angling experience than Danish anglers (∅ 23.5 years). The majority of surveyed Lithuanian anglers reported experience of between 20 and 30 years of angling (42.8%) and 25% of Lithuanian anglers have gone angling for over 30 years. Participants from Poland do not have as much experience as surveyed anglers from Denmark, Germany or Lithuania. With an average of 15 years, Polish participants stated the lowest number of angling years in the survey sample; 40% of Polish participants have gone angling for 5 years or less.

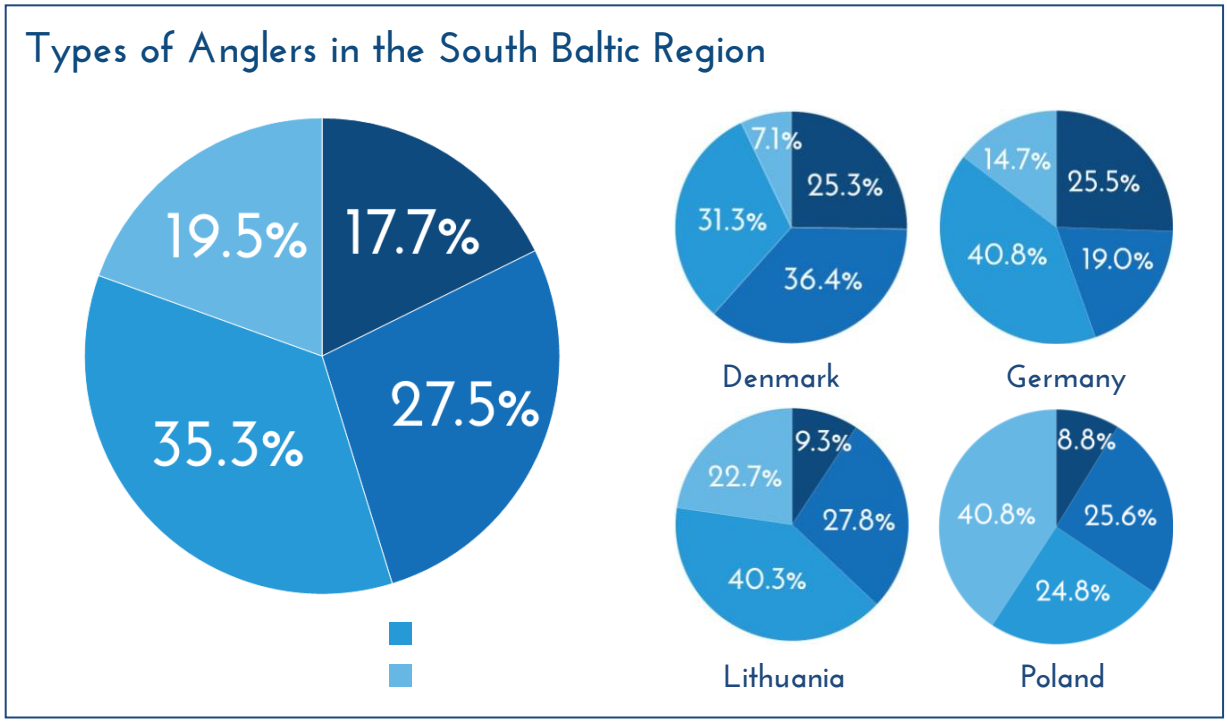
It should be mentioned that the distribution of angling experience among participating countries found in this study does not necessarily represent the overall or average angling experience in Denmark, Germany, Lithuania or Poland. The distribution presented could be a result of the accessibility and willingness to participate of anglers in the South Baltic Region. However, it might be assumed that due to differences in existing infrastructures and offers for anglers, the numbers and the experience gained vary across countries participating in CATCH.

Angler Types

In angling research, four types of anglers are distinguished depending on their commitment to recreational angling activities (Beardmore, Haider, Hunt and Arlinghaus, 2013). The "casual angler" goes angling only occasionally and spends much of her/his free time on other activities. The "active angler" goes angling on a more regular basis, but still spends a considerable amount of time on other leisure activities. "Advanced anglers" go angling often and spend a substantial part of their free time on angling. The last type of angler is the "committed angler", spending most of their free time on angling or angling-related activities.

In this survey, anglers were asked to evaluate themselves and indicate which of the four aforementioned angler types fits best with their own habits. The findings show that all types of anglers are represented in all four countries to a greater or lesser extent. The overall findings indicate that the group of "active anglers" is most strongly represented (35.3%) in the South Baltic Region. Nevertheless, the other three angling types are still highly represented by

the surveyed anglers. Across countries, however, several differences become apparent. The highest share of "committed anglers" can be found in Germany (25.5%) and Denmark (25.3%), whereas in Poland and Lithuania less than 10% of surveyed anglers indicated belonging to this group. Despite the high number of "committed anglers" in Denmark, most participants evaluate themselves as either "advanced" (36.4%) or "active anglers" (31.3%). In Germany and Lithuania, most participants also belong to the group of "active anglers"



(40.8%). In Poland, however, most anglers reported themselves to be "casual anglers" instead (40.8%). A more detailed outline of the distribution of angler types can be found in Figure 2.

Figure 2: Types of Anglers in the South Baltic Region

Preferred Angling Techniques

Preferred angling techniques vary in their rankings in the four participating countries. Differences in responses across anglers and countries might exist due to different environmental factors and surroundings, but also due to the location of residence as well as distance to the coast or other waters. For a simplified overview, the resulting Top 3 of each country can be found in Table 1.

■ Committed angler Active angler
■ Advanced angler Casual angler

TOP	Denmark	Germany	Lithuania	Poland
1	Coastal Angling in Waders	Sea Fishing from a Boat	River/Stream Fishing	Lake Fishing
2	River/Stream Fishing	River/Stream Fishing	Lake Fishing	River/Stream Fishing
3	Sea Fishing from a Boat	Coastal Angling in Waders	Surfcasting	Sea Fishing from a Boat

Table 1: Preferred Angling Techniques of Surveyed Anglers at National Levels

Preferred Fish Species

As with angling techniques, anglers' preferences for fish species vary not only between home waters and waters visited on holiday, but also among nationalities. For a more specific and comparative summary of the results, rankings of preferred fish species are listed separately for each nationality and water type (home or holiday) in the overview in Table 2.

	TOP	Denmark	Germany	Lithuania	Poland
Home	1	Sea Trout	Pike	Pike	Pike
	2	Salmon	Pikeperch	Perch	Pikeperch
	3	Pike	Perch	Bream	Salmon
	4	Cod	Cod	Pikeperch	Bream
	5	Brown Trout	Brown Trout	Salmon	Brown Trout
Holiday	1	Sea Trout	Cod	Pike	Salmon
	2	Salmon	Sea Trout	Perch	Cod
	3	Brown Trout	Plaice	Bream	Sea Trout
	4	Pike	Flounder	Pikeperch	Mackerel
	5	Cod	Pike	Salmon	Rainbow Trout

Table 2: Favourite Fish Species of Surveyed Anglers at National Levels

Differences in preferences may be explained by local environmental factors. The location of participants' residence decides which fish can be caught. Similar considerations apply to fish species favoured on trips and holidays. As shown in the following section, anglers from Denmark, Germany, Lithuania and Poland do not necessarily share the same country preferences for angling trips, but stay in their home countries or nearby foreign destinations. Therefore, differences between countries and similarities between home waters and travel destinations are not surprising.

3.3 Anglers' Travel Behaviour and Travel Habits

Questions regarding the holiday travel behaviour of participating anglers were subdivided into the three trip categories mentioned earlier: day trip, short holiday and main holiday. All questions were directed at trips or holidays participants had undertaken with the aim of going angling. In this section anglers were asked how often they go on an angling trip or holiday per year, how many days they spend on these holidays per year, with how many other people they usually go on angling trips or holidays and, last, which countries they have visited on their angling trips or holidays.

Frequency of Angling Trips and Holidays

The frequency of angling trips and holidays differs between countries and types of holidays. The answers of surveyed anglers varied from going on a maximum of one day trip per year to undertaking an angling day trip at least every weekend. Polish and German anglers go less often on angling day trips than Danish and especially Lithuanian anglers. The number of short holidays is considerably lower than the number of day trips per year in every country, with anglers having on average 2–4 short holidays per year with the main aim of going angling. This number is equally distributed among all four participating countries. The same applies to the number of longer (main) holidays anglers go on per year. On average, surveyed anglers in all four countries go on 1 and a maximum of 2 main angling holidays per year. A detailed overview is found in Table 3.

How often do you go on a .?.	Denmark	Germany	Lithuania	Poland
Day Trip	∅ 22x per year	∅ 15x per year	∅ 31x per year	∅ 10x per year
Short Holiday	∅ 3x per year	∅ 2-3x per year	∅ 4x per year	∅ 3x per year
Main Holiday	∅ 1-2x per year	∅ 1x per year	∅ 1x per year	∅ 1-2x per year

Table 3: Frequency of Angling Trips and Holidays at National Levels

Days Spent on Angling Holidays

Participating anglers were asked how many days they spend in total on short and longer (main) holidays per year. German anglers spend the lowest number of days on short angling holidays (∅ 7–8 days). Lithuanian anglers (∅ 11–12 days), Polish anglers and Danish anglers (both ∅ 12–13 days) spend significantly more time on short angling holidays per year. As the average frequency of short holidays is similarly distributed among all four countries, it may be assumed that German anglers spend in general fewer days on a single short holiday than anglers from Denmark, Poland or Lithuania.

In contrast, German anglers, as well as Lithuanian anglers, spend the most days on main holidays (∅ 15 days). Danish participants stated they spend on average 12 days on main holidays, and Polish anglers go for 11 days on an angling holiday.

Number of Companions on an Angling Trip or Holiday

Participants were asked to specify the number of people they usually go on an angling day trip with or spend their angling holidays with. The answers differ greatly across types of angling trips and to some extent across countries.

Strikingly, a higher number of Danish anglers, compared to German, Lithuanian and Polish anglers, prefer to go alone (26.0%) or with only one other person (38.5%) on an

angling day trip. In contrast, the majority of surveyed anglers in Germany (59.9%) and Lithuania (60.8%) reported spending their angling day trips with a small group of 2–4 other people. Polish anglers showed no clear preference in the number of accompanying people. However, the number of anglers there who go on angling day trips with a group of 5 or more (33.6%) is significantly higher than in Denmark (3.0%), Germany (7.2%) and Lithuania (3.1%).

Answers referring to short holidays showed that in all four countries surveyed anglers prefer spending their trips with 2–4 other people (Denmark: 53.8%; Germany: 71.3%; Lithuania: 66.7%; Poland: 60.2%). In Denmark a smaller group of anglers still favours going alone on angling short holidays (14.4%), whereas in Germany (1.5%), Lithuania (7.4%) and Poland (6.5%) the number of single anglers is relatively lower.

When going on longer holidays, anglers prefer spending their time in smaller or sometimes bigger groups. Scarcely any of the participants reported going alone on longer holidays. Instead, the majority of anglers in all four countries again favoured spending their main holidays with 2–4 other people. A more detailed overview of the survey results can be found in Figures 3a–c.

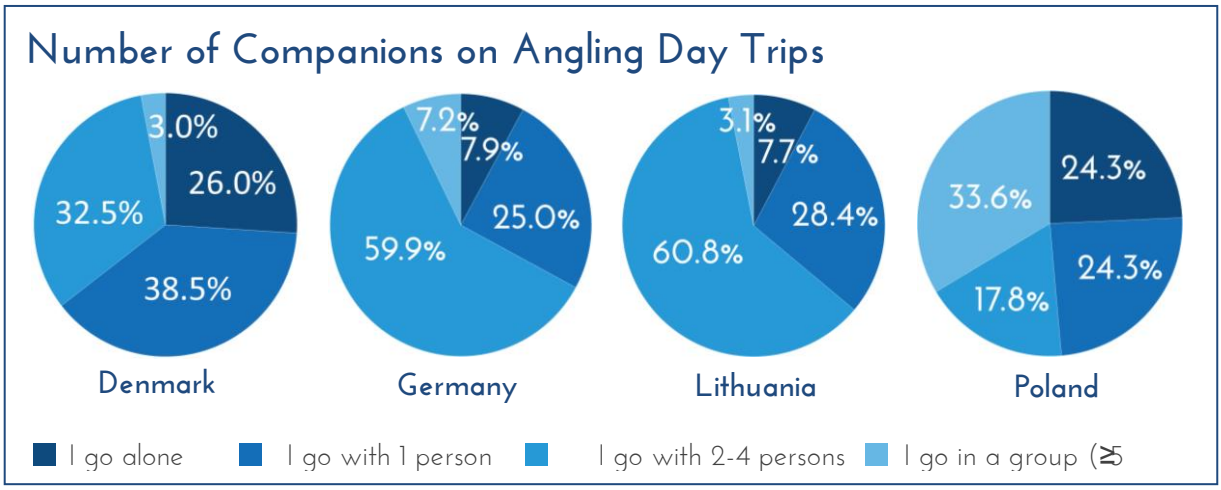


Figure 3a: Number of Companions on Angling Day Trips

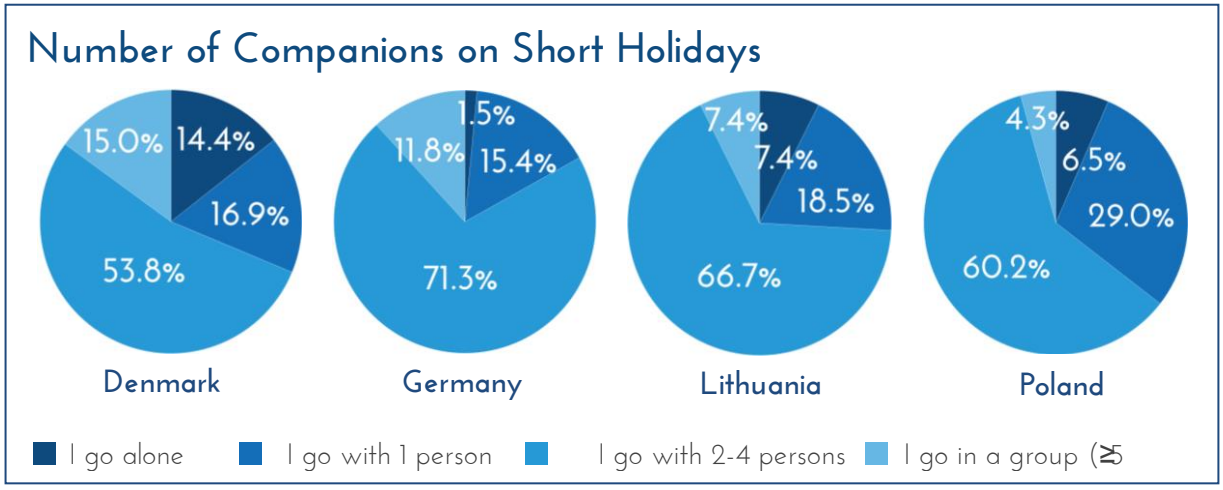


Figure 3b: Number of Companions on Short Holidays

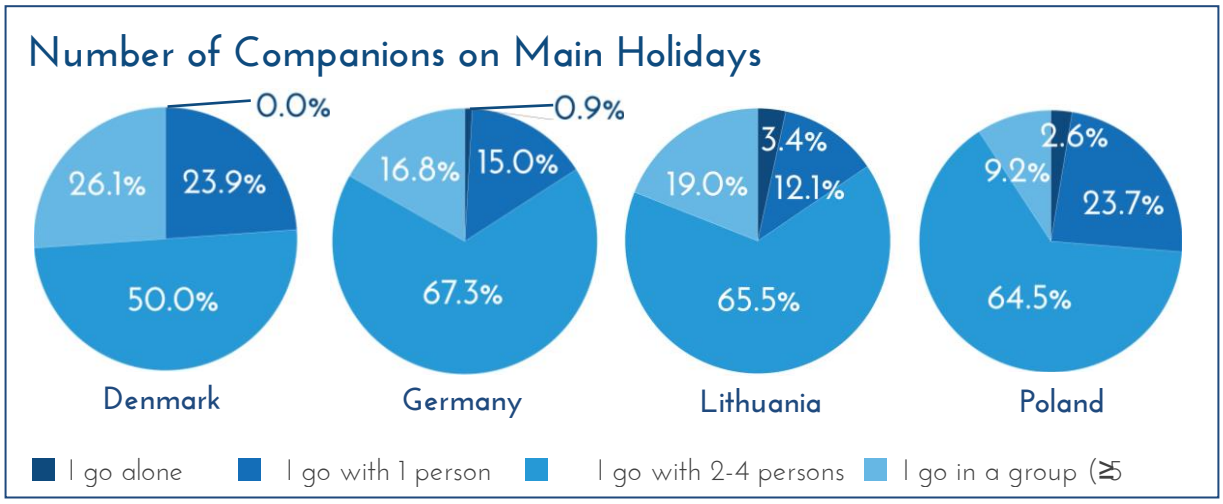


Figure 3c: Number of Companions on Main Holidays

Destinations of Angling Trips and Holidays

The choice of destination for any kind of angling trip depends both on the place of residence and the length of the respective trip. The findings of the survey show that in all countries the number one destination for most anglers is still their home country. This is especially evident in the choice of day trips, where almost all surveyed anglers indicated they prefer angling spots in their home country (Denmark: 90.9%; Germany: 86.5%; Lithuania: 93.2%; Poland: 93.6%). When other trip destinations were chosen, they were usually located in neighbouring countries.

When going on a short holiday, the majority of surveyed anglers still prefer staying in their respective home countries, but to a lesser extent than when going on a day trip

(Denmark: 61.5%; Germany: 60.1%; Lithuania: 65.4%; Poland: 73.3%). Other favoured destinations are still located in neighbouring countries, with Danish anglers preferring Sweden (28%) and Norway (6%), German anglers preferring Denmark (26.2%), Lithuanian anglers preferring Latvia (12.4%) and Norway (7.8%), and Polish anglers preferring Germany (11.9%). Few other countries were mentioned.

Home countries as a destination choice become less attractive for longer angling holidays. Especially in Denmark (18.1%) and Germany (28.3%) the number of anglers is reduced, but also in Lithuania (42%) and Poland (43.2%), where national angling spots are still important, the number of anglers spending their holidays in their home countries decreases. Besides their home countries, participants from all four countries favour going to Scandinavian countries on their holidays (Denmark: 50.6%; Germany: 59.8%; Lithuania: 43.1%; Poland: 29.5%). To a lesser extent, other European countries but also more distant destinations such as North or South America were mentioned.

3.4 Preparation and Organization of Travel Activities

In this section of the survey, anglers provided information on which criteria are most important when choosing a destination for an angling trip or holiday, which sources they use for finding the necessary trip information and how they usually organize their trips and holidays. Additionally, anglers were asked which information is generally difficult to find when planning and organizing an angling trip or holiday.

Criteria for the Choice of Destination

To gather broad information on which criteria anglers use to choose their destinations, this question was again divided into the three trip categories. The most important criteria when choosing a destination for going on an angling day trip are – by number of mentions – travel distance, fish species, landscape, preferred angling technique and stock status of preferred fish. The importance of these criteria is similar among countries. Small deviations can be found, especially in Lithuania and Poland. Compared to Denmark and Germany, Lithuanian and

Polish anglers strongly factor in travel expenses (Lithuania: Rank 4; Poland: Rank 2) when choosing an angling spot for a day trip.

The priorities of relevant criteria for holiday destinations, for both short and long holidays, differ more strongly among participating countries. The overall ranking of the most important destination criteria for short holidays includes – by number of mentions – fish species, landscape, stock status, preferred angling technique and travel expenses. Differences in priorities between countries are most evident in the criterion of travel expenses. Whereas in Lithuania and Poland travel expenses are the most important criterion for choosing a travel destination, in Denmark and Germany this criterion did not get into the Top 5 list of surveyed anglers. Instead, fish species at the chosen angling spot are by far the most important criterion for Danish and German anglers.

When choosing a destination for a longer angling holiday, the ranking of relevant criteria differs even more strongly among the four countries compared to the previous trip categories. The combined results of the survey revealed the following ranking: landscape, fish species, travel expenses, stock status and preferred angling technique. Although these results reflect important criteria for all countries, in the case of longer holidays it is necessary to examine anglers' priorities for each participating country separately. Whereas travel expenses are again very important for Lithuanian and Polish anglers, German and especially Danish anglers rank criteria such as available fish species and nature as more important. A detailed list of participants' priorities can be found in Table 4.

Criteria for Destination	TOP	Overall	Denmark	Germany	Lithuania	Poland
Day Trips	1	Distance	Fish Species	Fish Species	Distance	Distance
	2	Fish Species	Distance	Distance	Fish Species	Expenses
	3	Landscape	Landscape	Stock Status	Stock Status	Angling Technique
Short Holidays	1	Fish Species	Fish Species	Fish Species	Expenses	Expenses
	2	Landscape	Landscape	Landscape	Stock Status	Angling Technique
	3	Stock Status	Angling Technique	Stock Status	Distance	Landscape
Main Holidays	1	Landscape	Fish Species	Landscape	Expenses	Expenses
	2	Fish Species	Landscape	Fish Species	Landscape	Landscape
	3	Expenses	Stock Status	Stock Status	Stock Status	Distance

Table 4: Main Criteria for Choosing a Trip Destination at Summarized and National Levels

Sources of Information

Before going on any kind of angling trip, anglers prepare for their trips by searching for information via various types of sources and media. To provide anglers with every necessary kind of information, there is a need to understand which sources they use when planning angling day trips or holidays. Interestingly, the information sources used are similar among the three trip categories. When searching for relevant information for both day trips and short holidays, surveyed anglers used – by number of mentions – friends, search engines/websites, forums and blogs, Facebook and magazines as resources. Small deviations can be found among nationalities. German anglers prefer to search for information in angling shops or videos rather than through Facebook. Similarly, Lithuanian anglers also use their local angling shops as a source of information. Polish anglers, however, favour books and videos over Facebook and magazines.

Planning a longer angling holiday makes it necessary to search for more detailed information compared to day trips. Therefore, the results of the survey imply that information obtained via Facebook is not sufficient. Nevertheless, the information resources applied are

similar: friends, search engines/websites, forums and blogs, magazines and videos. Of particular interest is the fact that in the planning and organization of any trip category, anglers from all four countries heavily rely on the experiences and recommendations of friends and other anglers.

Information that is Difficult to Find

Although anglers draw on various resources, participants reported several kinds of trip information that are difficult to find. Participants' answers made it evident that especially information on angling spots, but also on laws and regulations as well as angling licences in the respective holiday destinations hardly exists or is particularly difficult to find. Furthermore, anglers seem to have problems finding all the necessary information on accommodation suitable for anglers, closed seasons, shops and guides.

TOP	Denmark	Germany	Lithuania	Poland
1	Angling spots	Laws & regulations	Laws & regulations	Angling licences
2	Laws & regulations	Angling spots	Angling spots	Angling spots
3	Angling licences	Angling licences	Accommodation	Angling guides
4	Accommodation	Accommodation	Angling licences	Laws & regulations
5	Closed seasons	Angling shops	Closed seasons	Accommodation

Table 5: Information that is Difficult to Find at National Levels

Organization of Angling Trips and Holidays

Anglers were asked to provide information on how they usually organize their angling trips and holidays. Preferences may vary from self-organized trips to the employment of travel agencies to organize the complete trip. Interestingly, anglers from all four countries agree on the same preferences for organizing their angling trips or holidays. For every trip category, anglers by far favour organizing their trips by themselves rather than using the help of

professionals. However, some also use offers from angling clubs and associations, local tourist boards or travel agencies which are more or less specialized in angling holidays.

3.5 Anglers' Travel Arrangements for Trips and Holidays

Besides varying preferences for planning an angling trip, actual travel arrangements may also differ among all participating countries. Therefore, in this section of the questionnaire anglers indicated their preferred transport modes, preferred accommodation types and the criteria for choosing them, as well as the overall travel expenses for angling day trips, short and longer angling holidays per year.

Preferred Transport Mode

Surveyed anglers' preferred mode of transport is, maybe due to convenience reasons, their own car or travelling with a fellow angler. A smaller number of anglers also take the ferry or plane and a rented car to travel to more distant angling destinations. German and Lithuanian participants reported travelling by bus or train too.

Preferred Accommodation for Angling Holidays

Anglers were asked to choose their preferences from different types of accommodation. The question was posed for short and main holidays separately. Overall, anglers prefer staying in cottages or on a camp site when going on a short holiday. Accommodation types such as shelters, apartments and bed and breakfast accommodation (B&Bs) also made it into the Top 5 of preferred accommodation. Due to the fact that the results show significant differences among the participating countries, this listing has to be considered carefully. Compared to Denmark, Germany and Poland, Lithuanian anglers mostly prefer staying in shelters over renting an apartment or a cottage. In addition, simpler accommodation, such as camping or staying in a hostel, was ranked higher by Lithuanian anglers. By contrast, only a few Polish anglers indicated staying at shelters, preferring to stay in cottages or even hotels when going on short angling holidays. Nevertheless, many anglers also stay at camp sites. German and Danish anglers are by far the most likely to choose cottages as accommodation for their angling holidays. Whereas Danish anglers also indicated camping as the second most

preferred accommodation type, German anglers favour staying in an apartment over camping.

Accommodation preferences for longer angling holidays differ slightly from those for short holidays. A significantly smaller number of surveyed anglers use shelters as their accommodation for a higher number of overnight stays. Instead, the overall ranking shows that again cottages are primarily rented by anglers for their main angling holidays. Further popular accommodation types are – by number of mentions – camp sites, apartments, hotels and B&Bs. The findings show some differences among the four countries. Instead of renting an apartment, Danish anglers prefer to stay at B&Bs, hotels or even hostels. German anglers, by contrast, prefer cottages and apartments over camping, hotels or shelters. In contrast to the majority of anglers in the other three countries, Lithuanian anglers do stay in cottages, though they also mention camp sites and shelters as favourite accommodation types. Polish anglers represent the highest percentage of anglers staying at hotels on angling holidays. A more detailed presentation of results can be found in Table 5.

Preferred Accommodation	TOP	Overall	Denmark	Germany	Lithuania	Poland
Short Holidays	1 2 3	Cottage Camping Shelter	Cottage Camping B&B	Cottage Apartment Camping	Shelter Camping Hostel	Cottage Camping Hotel
Main Holidays	1 2 3	Cottage Camping Apartment	Cottage Camping B&B	Cottage Apartment Camping	Cottage Camping Shelter	Cottage Hotel Camping

Table 6: Preferred Accommodation for Short and Main Holidays at Summarized and National Levels

Criteria for Choosing Accommodation for Angling Holidays

As indicated in the previous question, anglers may choose their preferences from various types of accommodation. This choice can be affected by several criteria, which the survey aimed to identify with a follow-up question. For both short and main holidays, and also equally for all four countries, the findings imply that the most important criteria for choosing suitable

accommodation are proximity to an angling spot, price and location/region. With varying priorities, also the space for a boat or angling gear, the availability of boat rentals and the local infrastructure are considered.

Travel Expenses for Angling Trips and Holidays

Participating anglers were asked to specify how much money they spend on average for their angling day trips, short holidays and main holidays in one year, including all expenses except angling gear. Due to the differences in duration and frequency of angling trips, the volume of expenses naturally varies between the types of angling trips and holidays. The findings of this survey also revealed significant differences among countries. German anglers spend by far the highest amount for angling trips in one year. They are followed by Danish anglers. Surveyed Lithuanian and Polish anglers spend significantly less money on angling trips, with anglers from Lithuania spending more than those from Poland for short and main holidays. The detailed amounts of expenditure for each country can be found in Table 6.

Average Expenses	Overall	Denmark	Germany	Lithuania	Poland
Day Trips	€40	€31	€73	€26	€29
Short Holidays	€223	€252	€367	€161	€112
Main Holidays	€736	€847	€1,136	€586	€374

Table 7: Annual Average Travel Expenses for Day Trips, Short and Main Holidays at Summarized and National Levels

At this point of the survey report, it needs to be highlighted that the expenses for angling trips and holidays are specified in absolute numbers and should be considered with caution. Average expenses in each country need to be considered in the context of national average incomes and living costs. Unfortunately, a comparison to previous reported numbers cannot be made, as data for recreational angling only exists for Germany. Arlinghaus (2006) specified that German anglers (without differentiation) spend on average €920 for their hobby

per year. Including indirect expenses, this figure totals €,590 per year. A comparison with the results of CATCH, however, is only possible to a limited extent, as the samples and contexts questioned as well as the structure of the specific questions differ. Still, the numbers illustrate that both general anglers and coastal anglers in Germany spend a considerable amount of money on their hobby and travels.

3.6 Opinions on Angling Guides

Angling skills and experiences can vary due to age, time or commitment to angling, to name just a few factors. In addition, conditions at angling destinations can differ from country to country or even from region to region. Therefore, local knowledge offered by angling guides can be especially beneficial, particularly for non-resident or less experienced anglers. To verify this assumption, anglers who participated in the survey were asked how often they actually hire local angling guides on their angling trips or holidays in order to profit from their angling as well as local knowledge. Surprisingly, participating anglers do not usually hire angling guides for their trips, or do so only rarely. This result is consistent among all four participating countries.

For a better understanding of why anglers do or do not hire angling guides for their trips, participants were also asked to indicate the reasons for their choices. Those who consider hiring an angling guide want to, in particular, take benefit of the guide's knowledge on where to find the right angling spots. In addition, knowledge on using the right angling gear or which written and unwritten laws and rules apply in the respective region or country are reasons for hiring a guide.

Participants who usually do not hire angling guides for their trip most often indicated that they do not need an angling guide because of their advanced angling experience. Another frequent reason named by participants for not hiring an angling guide was the monetary aspect or the possibility of gaining all trip-relevant information on the Internet. A rather small number of participants reported a bad previous experience with an angling guide or problems in communicating with the guide due to language barriers.

3.7 Purchase, Loss and Replacement of Angling Gear

In addition to the information on travel expenses of Danish, German, Lithuanian and Polish anglers, it was of great interest to learn more about anglers' buying habits regarding angling gear and equipment. Surveyed anglers were therefore asked about where they usually buy their angling gear, how much they spend on it per year and how often, with what kind and why they usually replace their equipment.

Anglers' Buying Behaviour and Expenses for Angling Gear

The findings clearly show that anglers from all four participating countries mainly buy their angling gear and equipment in angling shops. Nearly 90% of surveyed anglers prefer going to a real-life shop; however, online shops do gain in importance for anglers when buying their equipment. In Lithuania and Poland about 40% reported using the Internet for buying angling gear, whereas in Germany and Denmark even more than 60% buy their angling gear on the Internet.

Similar to the findings on overall travel expenses, the average annual amount of money spent on angling gear differs greatly among all four countries. In Poland, the surveyed anglers spend on average €90 for angling gear and equipment in one year. In contrast, by far the highest number is spent by surveyed Danish anglers, who reported spending more than €,000 per year for their angling gear. German anglers spend the second highest amount on angling gear, totalling €783. Lithuanian anglers, similar to those in Poland, spend on average much less money on angling per year (€375). Though the results show a distinct trend for which nationality spends the highest amount on angling gear and equipment, it should be noted that expenses also differ at a national level. In Germany, though 31.5% of surveyed anglers reported spending more than €750 per year, more than half of participants spend considerably less than €500 on angling gear. As with the figures for travel expenses, the indicated amounts of expenses for angling gear also need to be considered cautiously and in the context of national average incomes and living costs.

Replacement and Loss of Angling Gear

A reason for buying new angling gear and equipment can be the replacement of old, damaged or even lost gear. Anglers were asked about their primary intention when replacing their angling gear and again differences among countries became apparent. Danish anglers mainly replace their angling gear for better or undamaged gear, but seldom because gear gets lost. In Germany, anglers named all three reasons; mostly, however, it was the replacement of damaged or lost gear. Lithuanian anglers mainly replace their gear to get better-quality equipment or because their previous gear has been lost. Polish anglers indicated that they mainly buy new gear due to the loss of the old equipment.

The frequency of replacing angling gear is at a semi-regular basis of every 1–2 years. However, the majority of anglers only replace their gear when required, which may vary from very often to every 10+ years, depending on the type of equipment but also the type of angler. For sustainability reasons, the study followed up on questioning the quantity of gear that gets lost. Without going into further detail, a high amount of angling gear and equipment gets lost, particularly various types of baits, hooks, weights and several metres of angling line.

3.8 Motivations and Boundaries for Going on Angling Trips and Holidays

At the end of this survey, general reasons for why anglers from each country go on angling trips and holidays were identified, as well as reasons or factors that prevent them from going. Surveyed anglers were asked to rate several statements for and against going on an angling trip or holiday. Each set consisted of subcategories and was evaluated separately. Rating items were taken from Beardmore, Haider, Hunt and Arlinghaus (2011).

Motivations for Going Angling

The first set of statements referred to reasons why anglers go angling, which can be classified into catch and non-catch motives. Interestingly, the findings of this survey imply that anglers

from Denmark, Germany, Lithuania and Poland evaluated non-catch motives as significantly more important than catch motives. Experiencing nature, enjoying solitude or merely being with friends and family are more important factors than making a good catch or mastering angling-related challenges. Though the findings show a similar trend across all partner countries, deviations among single results exist. A detailed overview of national ratings can be found in Figure4.

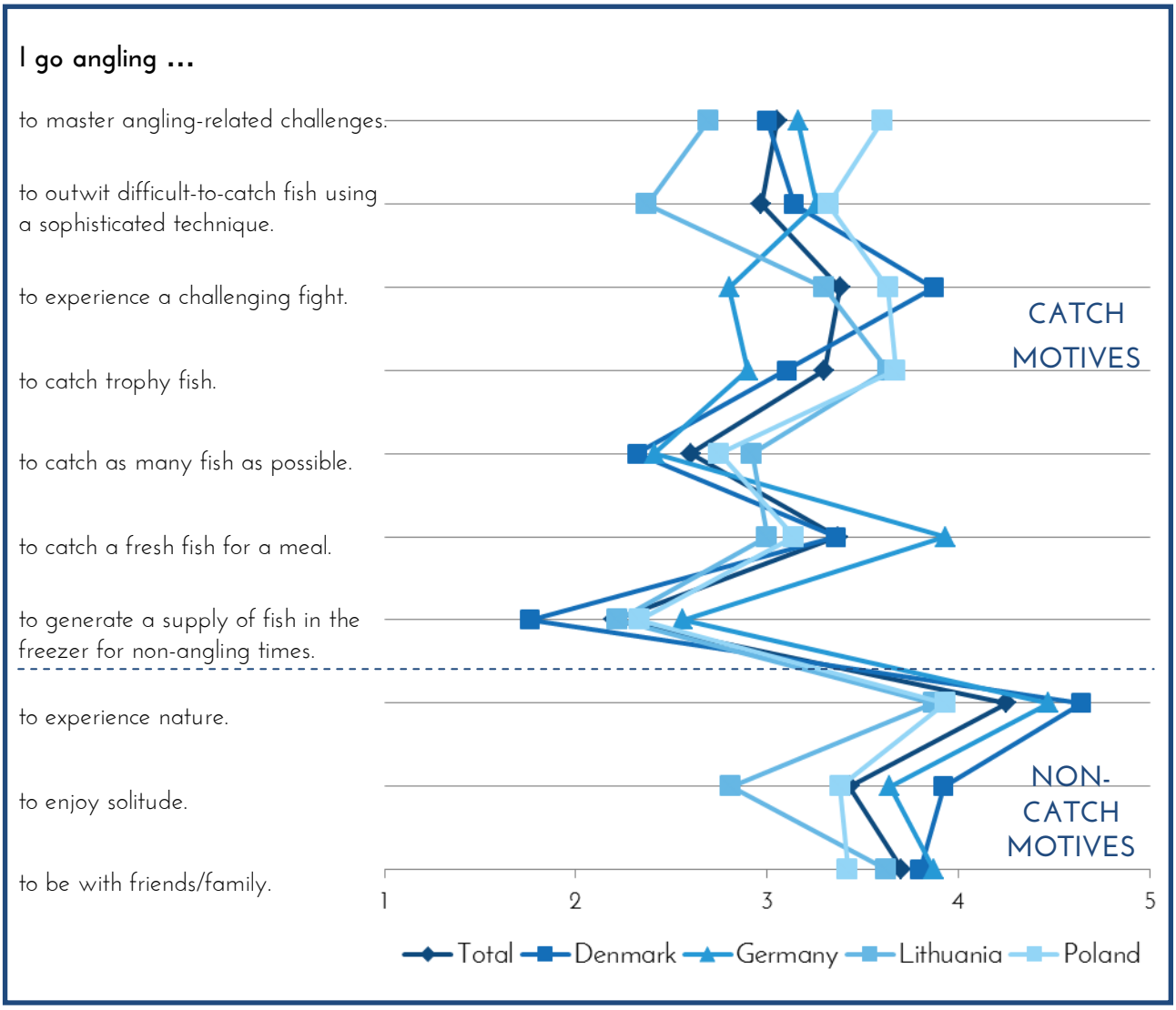


Figure 4: Motivations for Going on Angling Trips at Summarized and National Levels
(Statements were evaluated on a 5-point scale, from 1 [strongly disagree] to 5 [strongly agree])

Boundaries to Going Angling

When asked for reasons preventing anglers going on an angling trip, surveyed anglers had to rate statements from three categories: interpersonal boundaries, angling quality boundaries and conditional boundaries. For anglers from all four countries, shortcomings in angling quality – including a high number of other anglers at an angling site or the non-existence of certain fish species – are major reasons preventing them going on an angling trip. For German and Polish anglers, insufficient conditions for an angling trip, including unclear or too strict regulations and too expensive angling licences, are also reasons that prevent them from going angling. However, it is necessary to refer to an overall low rating of possible barriers. Personal boundaries are the least likely to hinder surveyed anglers. Moreover, shortcomings in angling quality or conditions – though more affecting – were likewise not rated as highly hindering. It might be concluded that when anglers plan to go on an angling trip, they choose destinations with minimal boundary conditions for themselves. National differences are shown in Figure 5.

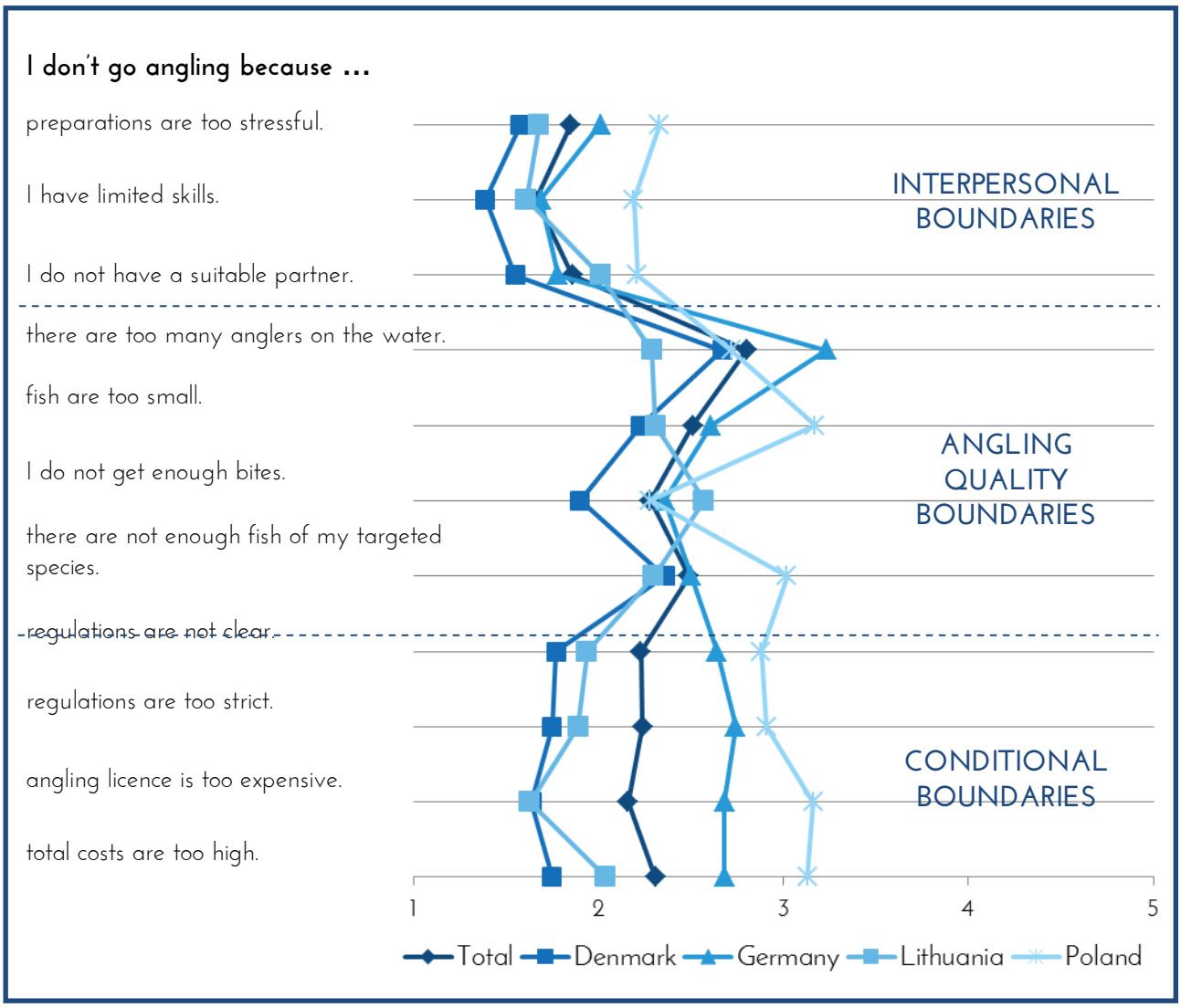


Figure 5: Boundaries to Going on Angling Trips at Summarized and National Levels
(Statements were evaluated on a 5-point scale, from 1 [strongly disagree] to 5 [strongly agree])

3.9 Reports on Recent Angling Trips and Holidays

Building on the knowledge of which factors affect anglers going on an angling trip or holiday, the survey further intended to identify why anglers are satisfied or not satisfied with their trips. For this reason, participants were asked to remember their most recent angling trips and indicate positive and negative aspects that they had experienced on this particular trip.

By far the most positive aspects of trips and holidays that influence anglers' satisfaction are the landscape and the surrounding nature. Secondly, in the overall rating more than half of participants named the quality of angling sites and the time spent with family and friends as critical factors for their satisfaction. At a national level, only minor differences appeared. The majority of surveyed anglers agreed on the same most positive aspects. However, only a few Polish anglers evaluated the quality of angling sites to be as positive as anglers from Denmark, Germany or Lithuania. Instead, "a good deal" determines their satisfaction with an angling trip. Lithuanian and German anglers also highly value personal angling success as a satisfying aspect of angling trips.

Although the surveyed anglers reported that angling success or catch-related factors are not the most important aspects of going on an angling trip, around one-third of surveyed anglers evaluated the absence of angling success as a negative aspect of their latest trips. The presence of too many other anglers also negatively affects anglers' overall satisfaction. Polish anglers reported additional shortcomings in fish sizes and species. These findings indicate that catch motives might not be primary factors for planning an angling trip or holiday, but still influence anglers' satisfaction with their actual trips. Therefore, non-catch as well as catch motives need to be considered when compiling satisfying holiday packages for anglers. However, depending on angler type and angling experience, the importance of catch motives may vary.

4 Conclusions

4.1 Reflections on the Potential of Coastal Angling Tourism

Today, coastal angling tourism is a niche market that can benefit from economies of scope, segmentation and well-designed and customized holidays. The focus should be on **added-value services** in order to attract customers who value the quality of these additional services and highly personalized experiences. This in turn is expected to be more sustainable for coastal communities and local landscapes (ECORYS, 2013). Some countries have already acknowledged angling tourism as a profitable and growing business segment, while other coastal areas still have unused potential.

Current tourist trends and drivers present coastal communities with new challenges. However, these challenges also hold out potential opportunities for communities to adapt and differentiate themselves from other destinations in order to attract visitors. Focusing on coastal angling tourism can help coastal communities to benefit from current trends and the resulting challenges of the tourism sector. This includes changes in demand patterns, not only in the choice of holiday destinations but also in a shift to more but shorter trips (EASME, 2016). Angling tourism meets the **growing demand for sustainable tourism** and may at the same time offer holiday experiences adapted to visitors' limited time. Likewise, the growing acceptance of tourists of acting in a more environmentally conscious manner (EASME, 2016) boost the attractiveness of coastal angling tourism. When concentrating on sustainable tourism as well as the **promotion of unique local features**, the as yet hidden potential of coastal communities can be exploited.

However, maximizing this potential requires an understanding of the target group for the particular niche market. For coastal angling tourism, information on the target group, especially on anglers in the South Baltic Region, has been limited. The CATCH angler survey therefore addresses this issue by extending present knowledge on the habits, preferences and demands of anglers. The survey supports CATCH in meeting its primary objective of giving service providers and coastal communities all the necessary information and tools to promote coastal angling tourism, and to create a comprehensive knowledge platform for interested anglers. The CATCH angler survey report demonstrates the multitude of information gathered

from participating anglers. Nevertheless, this data depicts only a fraction of the available angler data and raises no claim to be complete, scientific or generalizable.

4.2 Implications of the CATCH Angler Survey

Despite differences in average angling experience and the distribution of angler types throughout the CATCH partner countries, Denmark, Germany, Lithuania and Poland, many commonalities between anglers have become apparent. Similar preferences, for example, in motivations for going angling, in planning and organizing trips and holidays and in holiday accommodation indicate similar behaviour patterns of anglers in the South Baltic Region. Differences at an international level have been observable mainly in financial issues and, unsurprisingly, in preferences for fish species and angling techniques due to regional distinctions.

Benefiting from Anglers' Commonalities

This knowledge on the commonalities and differences of anglers in the South Baltic Region can be used for drawing conclusions about implications for coastal angling service providers. Besides an impulse for a possible cross-border marketing strategy, several opportunities for the specific design of service offers and marketing tools can be drawn from this study's findings.

As a basis for the development of new or improved services, providers can appeal to the fact that the majority of participating anglers value **non-catch motives**, including enjoying a peaceful holiday with family or friends in nature, more highly than catch-related motives. Instead of solely promoting the angling experience itself, **extended offers** for anglers and their companions should be developed. Any campaign, offer or service bundle could **highlight the benefits of catching fish in combination with enjoying a family trip or holiday with friends, while experiencing a unique landscape** and having the possibility of getting away from one's daily routine. Still, this should not exclude advertising angling trips for single anglers who prefer having some time on their own. Most anglers, however, have expressed enjoyment of their trips and holidays in company. As this can be both other anglers and/or non-angling company (family, partners etc.), the services offered should be diversified in order to address a larger group of visitors, including non-anglers. If due to limited resources it is not possible to do this,

services should only be customized to the intended target group. An effective positioning of service providers could include group offers for anglers that advertise the joint experience while pursuing their hobby. **Additional offers for non-angling companions** help providers to distinguish themselves further from competitive offers and sectors. Offers could include activities that can be done while anglers are occupied (e.g. boat trips, tours, children's entertainment etc.) or together (e.g. water sports activities, bonfires etc.). Possible beginners' angling lessons for interested, not yet angling companions could be an opportunity to attract new customers.

The findings of the CATCH angler survey also demonstrate **anglers' preference for nearby angling spots and holiday destinations**. Travelling efforts may be limited to a certain degree, especially for those travelling with family. Service providers and coastal communities in particular can benefit from this circumstance and adapt their marketing and corporate strategies accordingly. In order to attract more visitors from home countries as well as from neighbouring Baltic countries, the focus should be on **highlighting local benefits** and advantages over more distant holiday destinations. The **uniqueness of the promoted destination or service** should be easily identifiable. Incomparable experiences in uncrowded and beautiful surroundings with appealing fish species can convince anglers and make them realize they do not need to travel to distant destinations while the perfect experience is virtually on their doorstep. Angling spots and services on the home Baltic coast or in other Baltic states are easier to reach and less time and resources are needed for travelling, which in turn positively affects anglers' ecological footprint. For services, especially accommodation, which are not directly located at an angling spot, special features should be advertised even more intensively. Though proximity to an angling spot has been mentioned as the most important criterion when choosing accommodation, anglers can be persuaded by a full package of all the services and facilities they need for a carefree angling holiday at a sensible price.

Using Differences for Customized Service Experiences

Differences between anglers from Denmark, Germany, Lithuania and Poland revealed by the CATCH angler survey are low, but should not be underestimated. First, favoured fish species or angling techniques differ due to **regional and environmental conditions** in each country.

Several fish species are common to all of the four Baltic countries, but each country or even region is known for its stock of less common species. Regional or local marketing initiatives should therefore address these unique features and promote them in combination with the exceptional services offered for anglers and their companions. Anglers who look for **variety or different and new experiences** can be attracted by these unique features and angling opportunities.

Second, one considerable difference among nationalities is the amount of money spent by anglers for their hobby, angling gear and travelling. Participants' answers revealed that anglers from Denmark and Germany spend considerably more money than anglers from Poland or Lithuania, although the stated numbers should be treated carefully, as they merely represent absolute figures. Nevertheless, **expenses for angling-related services** need to match the financial resources of the target group. Overpriced offers probably do not meet the approval of anglers, as many cannot afford them and they do not belong to a group of luxury-seeking visitors. Anglers look for simple accommodation such as cottages and camping sites, furnished with the necessary facilities to prepare and freeze fish, dry their clothes or store their boat. Referring to boat tours or hiring angling guides, the same applies. **Offers should match the targeted anglers**, but also be adapted to the commonness of targeted fish species or angling techniques offered. Knowing their target groups, their expectations as well as their economic backgrounds helps angling providers to create customized and affordable services for each target and income group.

Strengthening Providers' Individual Potential

Comprehensive offers for angling trips and holidays may not always be offered by a single service provider, as this requires a high level of resources and the necessary infrastructure. Therefore, **cooperation and networks** are inevitable tools for the successful (continued) existence of angling service providers. In this regard, not only single providers can cooperate, but also entire communities. This allows a **diversified portfolio** of angling-related as well as supplementary, non-angling-related services to offer everything an angler desires. Strengthening local and regional networks reveals and unlocks the potential of coastal angling tourism for smaller and larger coastal communities alike.

All these considerations, however, are only worthwhile if the services offered are easily found and accessed by anglers and visitors. This implies that the **visibility of offers** has to be ensured, both offline and online. Participants' answers confirm that when planning and searching for relevant information on angling trips and holidays, anglers draw on available information from the Internet, including to a greater or lesser extent websites, blogs and Facebook. Still, survey findings also highlight the dissatisfaction of anglers with the availability of the necessary information, not only on laws and regulations but also on accommodation, shops and angling guides. Providers and communities need to consider this uncertainty and change it to be in their interest. **Increasing and improving service providers' Internet and social media presence** would contribute to advertising the services offered to a larger group of people and with that attracting a higher number of potential anglers and visitors.

4.3 Benefits of Coastal Angling Tourism and the Future of CATCH

Overall, insights gathered in the CATCH angler survey clearly illustrate the challenges but also the great potential of developing suitable service bundles for anglers from all countries. Coastal angling tourism puts coastal communities in the comfortable situation of being **independent of tourist seasons or holiday periods**. Instead, angling-related services can be offered for anglers at all ages and throughout the year, not just at busy times. This presents providers with the opportunity of offering **customized holiday experiences** and reacting to anglers' and visitors' wishes. At the same time, angling tourism is a chance for communities to foster tourism in line with **sustainability standards**. These standards do not merely consider the environmental dimension of coastal angling tourism, but rather the interaction with the ecological and social aspects of sustainability, which benefit all stakeholders in a coastal community. Instead of following unobtainable mass tourism, communities should be committed to the **responsible treatment of nature** and to attracting those visitors who look for a sustainable angling trip or holiday experience. Another benefit of coastal angling tourism is its great marketing potential. Via **online marketing and appealing websites**, providers and communities can easily attract their target group. Being listed on a collective platform such as the **upcoming CATCH website** can also foster the visibility of the services offered in promising locations.

In comparison to other coastal tourism sectors, angling tourism benefits from recent changes in visitors' demands. Other than already established sectors, angling tourism provides communities with the opportunity to use the upcoming trends to make themselves stand out from the anonymous monotony of common tourist offers. Customized service offers increase the added value for anglers and visitors, as well as the recognition value of the provider. The possibility of offering services all year round also benefits the regional economy, as it allows **long-time employment** and a reduction of independence on seasonal workers. Moreover, the **ecological, social and economic attractiveness** of coastal angling tourism for communities fosters the **cooperation of angling-related providers and stakeholders**, which in turn positively affects the development of the region. The CATCH angler survey hence provides not only new insights on the target group of coastal angling tourism, but also recommendations on how service providers and coastal communities can position themselves effectively in order to benefit from the potential of coastal angling tourism. However, it should be pointed out that the survey considered the demand side of coastal angling; the provider side has not yet been taken fully into account. An additional report will demonstrate the current situation of the provider side of coastal angling tourism. A comprehensive market analysis will enable CATCH to provide coastal communities with the relevant knowledge and tools to promote coastal angling tourism.

This knowledge will further be used as a basis for the **CATCH information platform on sustainable coastal angling tourism**, aimed at anglers, tourists, providers and interested stakeholders. The necessity of a **multilingual cross-border platform** was supported by various anglers' statements in the survey. Much angling holiday-related information can still not be accessed easily. CATCH therefore aims to provide a platform with all the necessary information for planning and organizing an angling trip or holiday, including a map with provider information, fish species, angling techniques, information on waters and angling spots, as well as references to prevailing laws, regulations and angling seasons. The platform will enable anglers to have all the information at a glance, overcome potential barriers and ensure carefree planning of their next angling trip or holiday. All the information and an angling dictionary will be available in Danish, German, Lithuanian, Polish and English.

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Appendix

Appendix 1 – National Demographic Characteristics of Participants

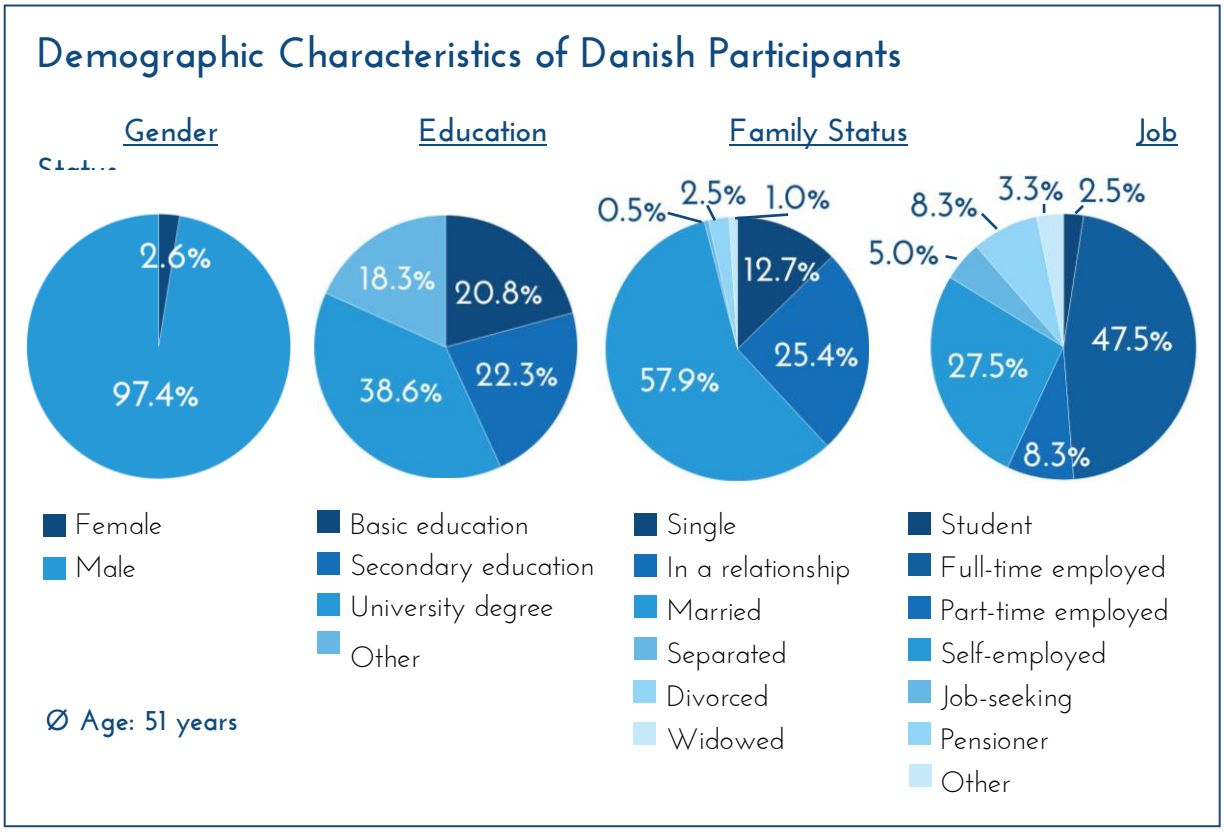

Figure A1: Demographic Characteristics of Danish Participants

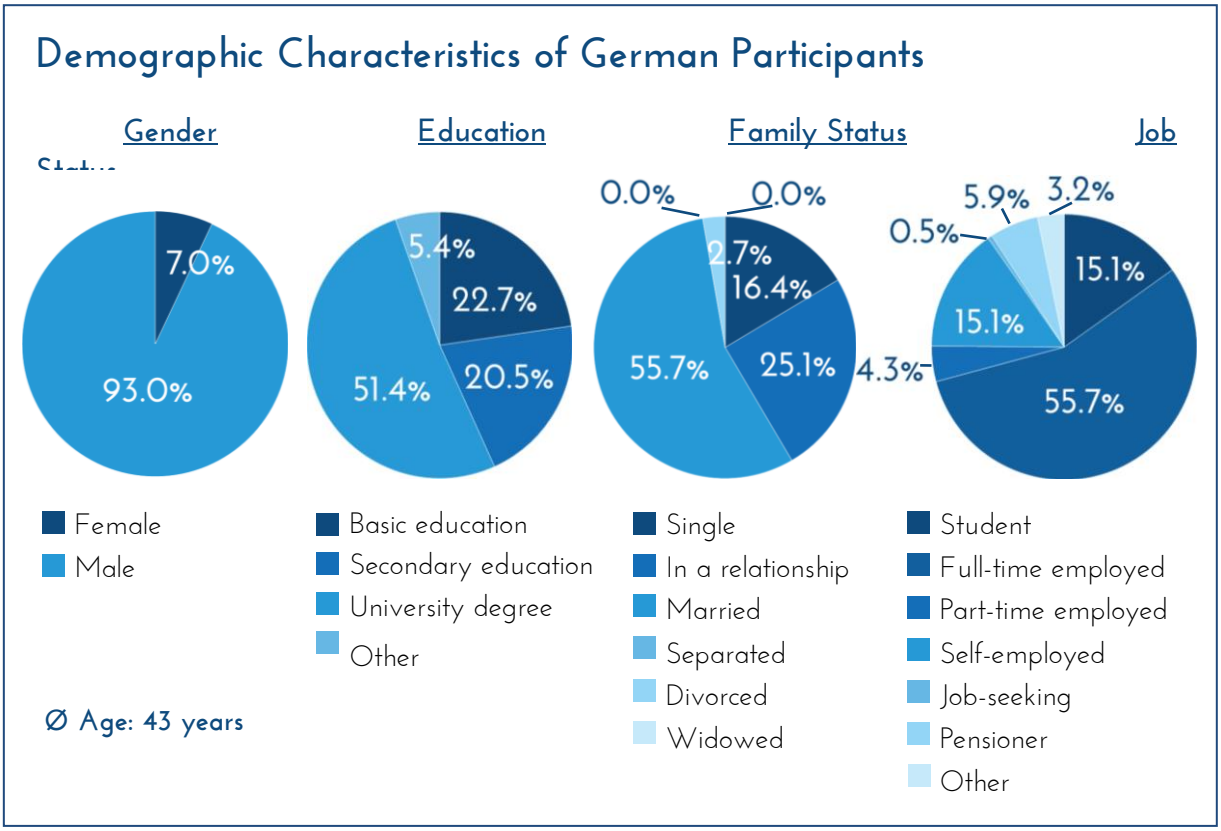

Figure A2: Demographic Characteristics of German Participants

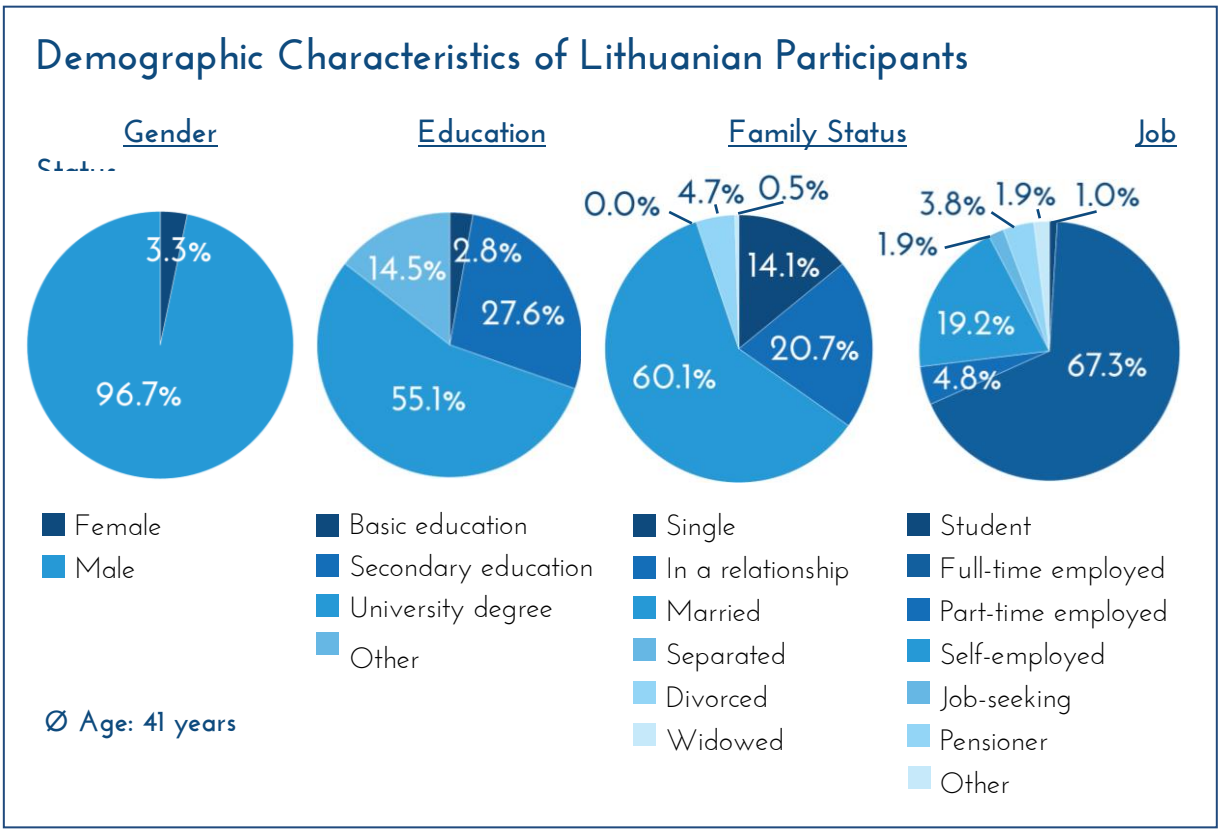

Figure A3: Demographic Characteristics of Lithuanian Participants

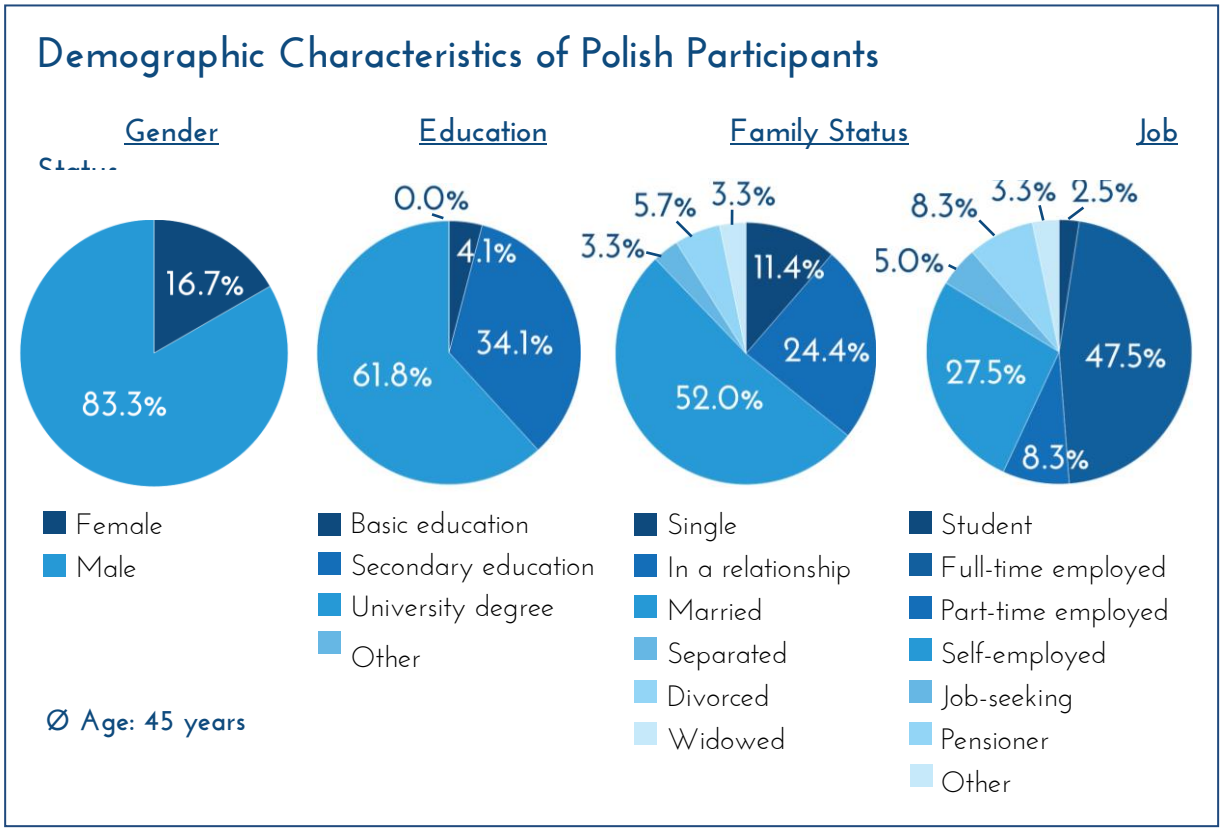

Figure A4: Demographic Characteristics of Polish Participants

Appendix 2 – List of Questions

1. General Information

- How often (per year) do you go on a) day trip, b) short holiday, c) main holiday?
- How many days per year do you spend on a) short holiday, b) main holiday?
- With how many people do you usually go on an angling trip for a) day trip, b) short holiday, c) main holiday?
- To which countries/regions do you travel to go on a) day trip, b) short holiday, c) main holiday?

2. Preparation of Your Travel Activities

- What are the main criteria when choosing your destination? (Top 5 for a) day trip, b) short holiday, c) main holiday)
- Which sources do you use when searching for information for your angling trips? (Top 5 for a) day trip, b) short holiday, c) main holiday)
- Which information is difficult to find when planning your angling trips?
- How do you organize your angling holidays? (Top 5 for a) day trip, b) short holiday, c) main holiday)

3. Local Angling Guide

- How often do you hire a local angling guide on your angling trips?
- Why do you hire a local angling guide? (Top 5)
- Why do you NOT hire a local angling guide? (Top 5)

4. Travel Arrangements

- How do you reach your travel destination?
- What is your preferred type of accommodation when going on an angling trip? (Top 5 for a) short holiday, b) main holiday)
- What are the relevant criteria when searching for accommodation? (Top 5 for a) short holiday, b) main holiday)

- How much do you usually spend on your angling holidays (all travel costs, excluding angling gear)?

5. Angling Gear

- Where do you usually buy your angling gear?
- How much do you spend on angling gear per year (all kinds of angling gear included)?
- How often do you replace your angling gear?
- Why do you have to replace it?

6. Angling Habits

- Angling experience (in years)
- Which of the following angler descriptions is most similar to you: committed, advanced, active or casual angler?
- What are your favourite forms of angling? (Top 5)
- What is your favourite fish in your home country? (Top 5)
- What fish do you like to catch on an angling trip/holiday? (Top 5)

7. Preferences and Opinions

Agreement with the following statements (1 – I strongly disagree, 5 – I strongly agree)

- I go angling …

  ..to master angling-related challenges.
  ..to outwit difficult-to-catch fish using a sophisticated technique.
  ..to experience a challenging fight.
  ..to catch trophy fish.
  ..to catch as many fish as possible.
  ..to catch a fresh fish for a meal.
  ..to generate a supply of fish in the freezer for non-angling times.
  ..to experience nature.
  ..to enjoy solitude.
  ..to be with friends/family.

- I don't go angling because …

  … regulations are not clear.
  ..preparations are too stressful.
  ..I have limited skills.
  ..I do not have a suitable partner.
  ..there are too many anglers on the water.

...fish are too small.
...I do not get enough bites.
...there are not enough fish of my targeted species.
...regulations are too strict.
...angling licence is too expensive.
...total costs are too high.

8. Your Last Angling Trip

- Please remember your last angling trip/holiday and answer the following questions. Was it a) day trip, b) short holiday, c) main holiday?
- How satisfied were you with your holiday?
- What were the most positive aspects?
- What were the most negative aspects?

9. Demographic Information

- Nationality, gender, age, distance to coast (residence), education, occupation, family status