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Overall evaluation of the stakeholder surveys for the Lower Saxony and Schleswig- Holstein Wadden Sea region



The Interreg IVB
North Sea Region
Programme

European Union



The European Regional Development Fund

Der Workshop wird im Rahmen des trilateralen Projektes "PROWAD – Protect and Prosper: Sustainable Tourism in the Wadden Sea" durchgeführt und wird teilfinanziert durch das Interreg IVB Nordseeprogramm



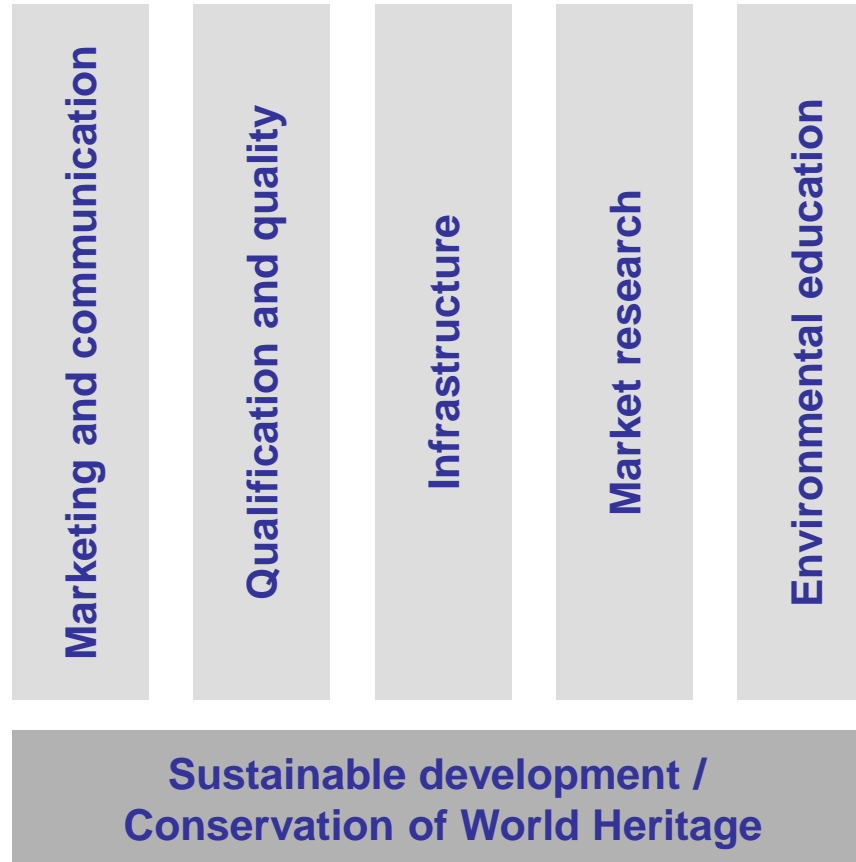
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10 YEARS 2001-2011

5-focus-areas-model



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Survey results: return



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Total started surveys : **169**

Completed surveys: **124 (73.4%)**

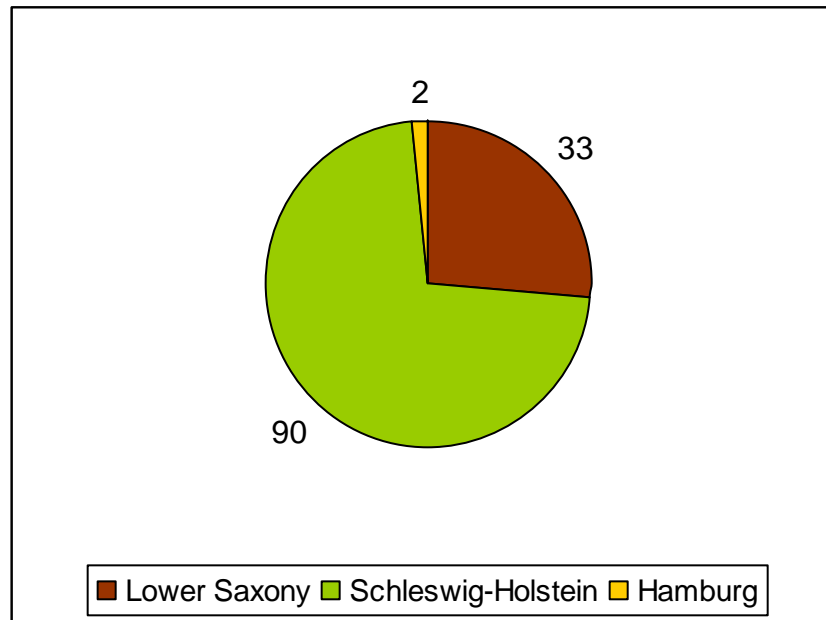
answered questionnaires per state:

- NDS = 33
- SH = 90
- Hamburg = 2

Survey period:

end of January –

end of April 2012



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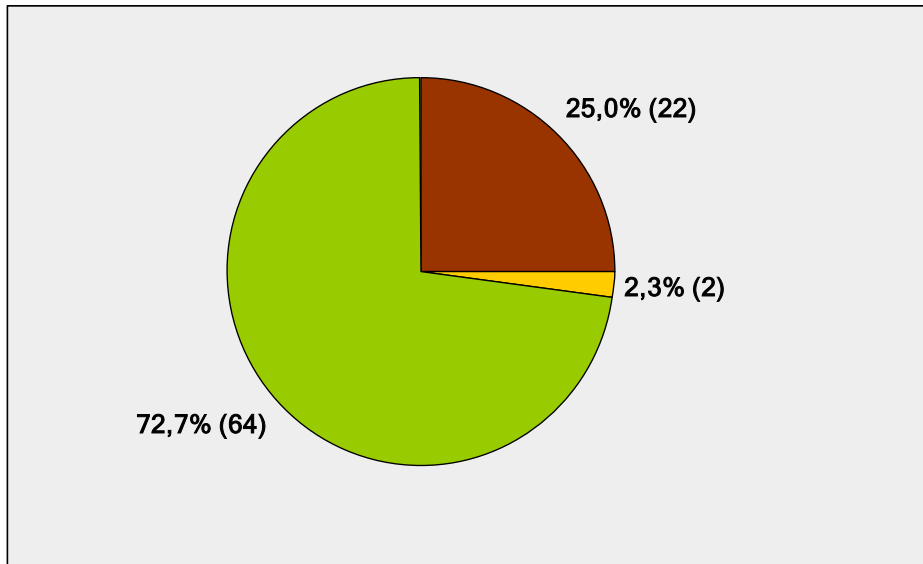
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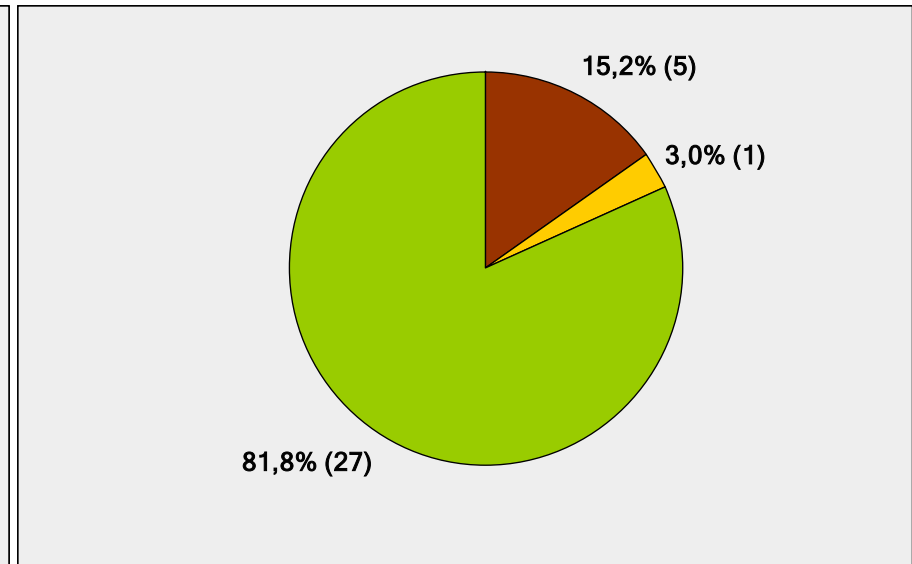
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10 YEARS 2001-2011

Schleswig-Holstein



Lower Saxony



Island
 Hallig
 Mainland



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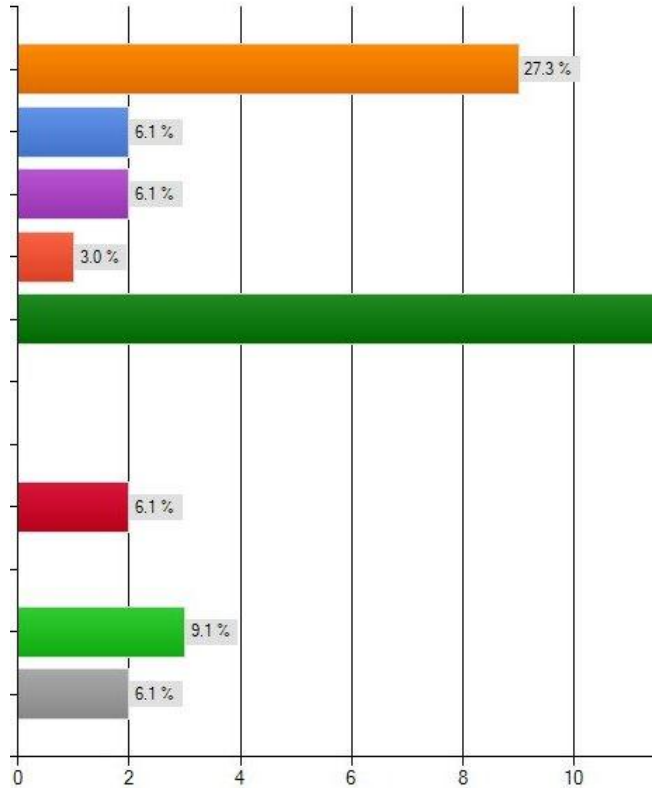
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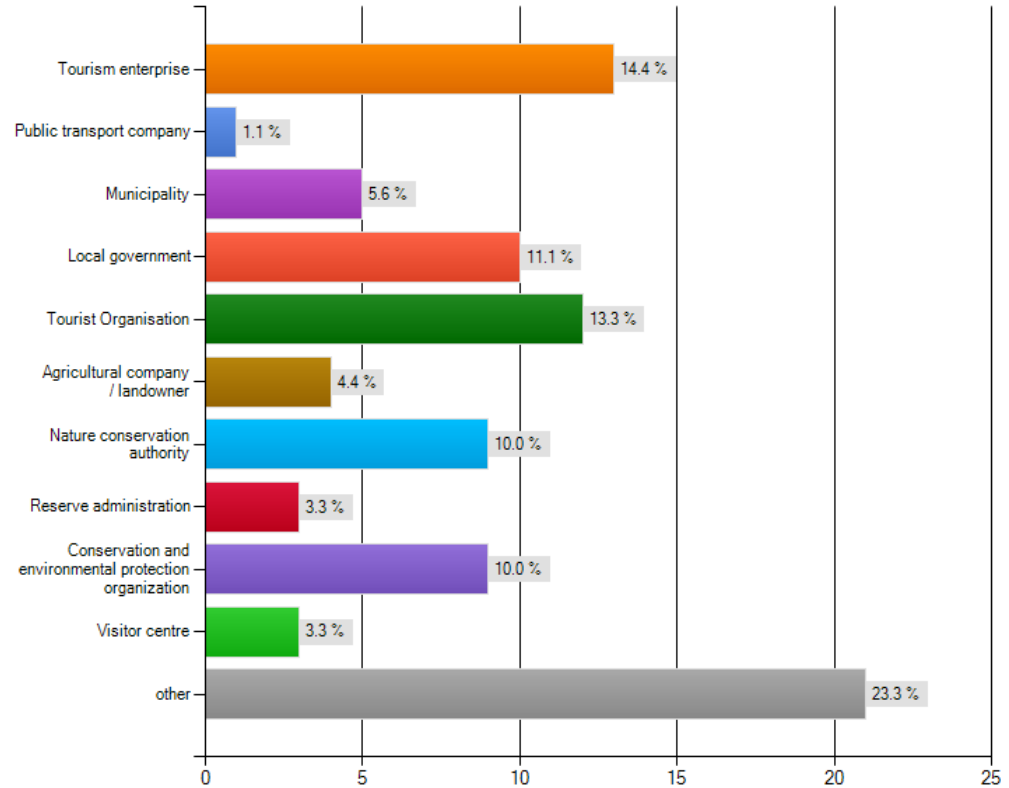
10 YEARS 2001-2011

Which stakeholders are participating?

Lower Saxony



Schleswig-Holstein



What are the possibilities of tourism development you see due to the World Heritage status?

- **Appreciation of nature and landscape / any forms of tourism should **not** endanger protected assets**
- **Rethinking of tourism stakeholder / **improvement of cooperation****
- **Quality improvement / new service opportunities and facets**
- **Raising awareness of nature and the environment among guests by sustainable tourism products/offers**
- **Improve the **eco-friendly arrival** / public transport services**
- **New addressing guests / **tap new target groups** / nature tourists**



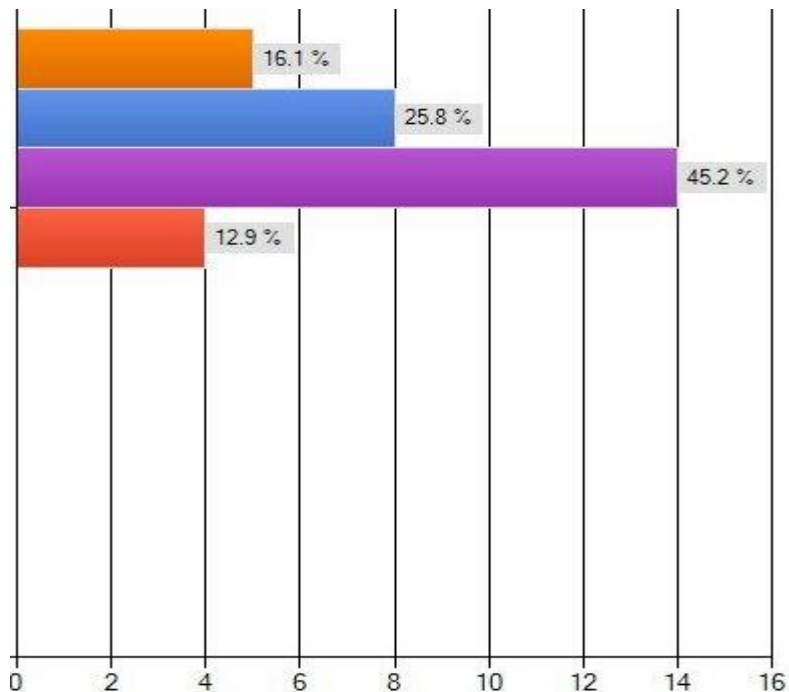
What are the possibilities of tourism development you see due to the World Heritage status?

- **Nationwide advertising / international guests**
- **Profiling of the Wadden Sea region** with a focus on nature experiences
- **Positioning as a unique destination / increase of awareness**
- **sustainability = authenticity and image improvement**
- **Extension of the off-season**
- **Further tourism growth vs. limited growth & ensure more/better quality**
- **Unbundling** of the tourism areas (islands / coastal hinterlands)

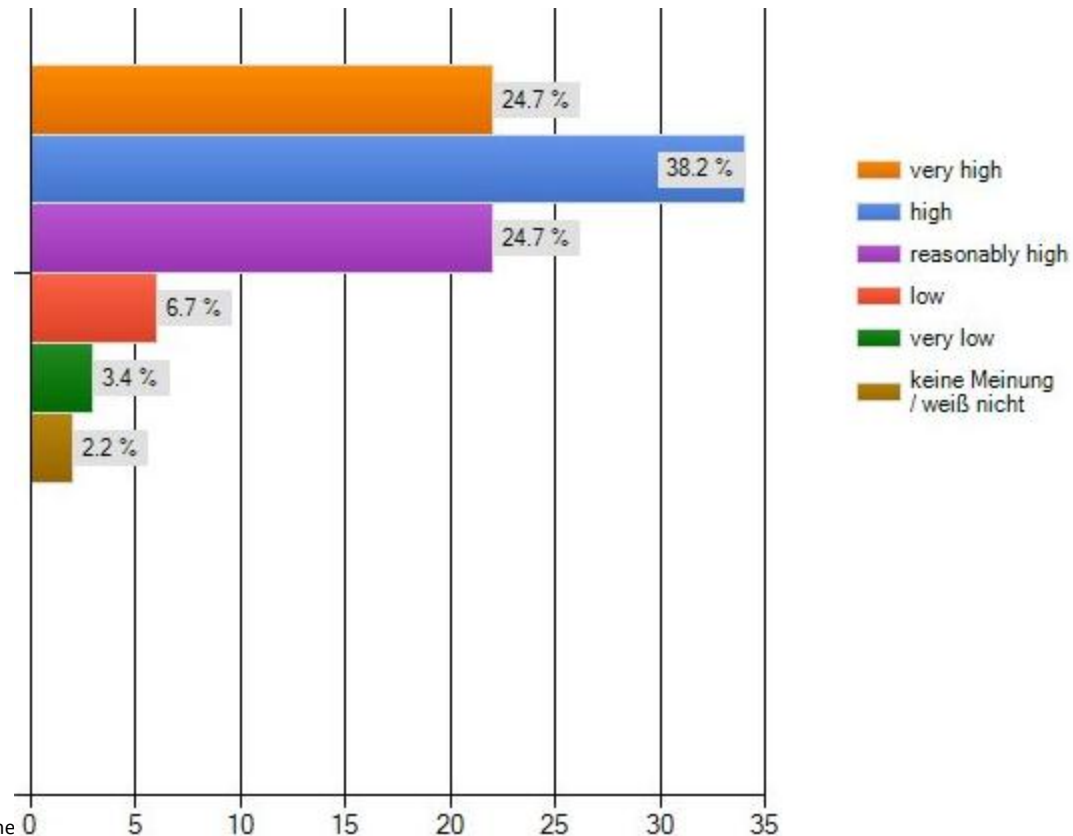


The Wadden Sea Region's potential to become an international tourism destination...

Lower Saxony

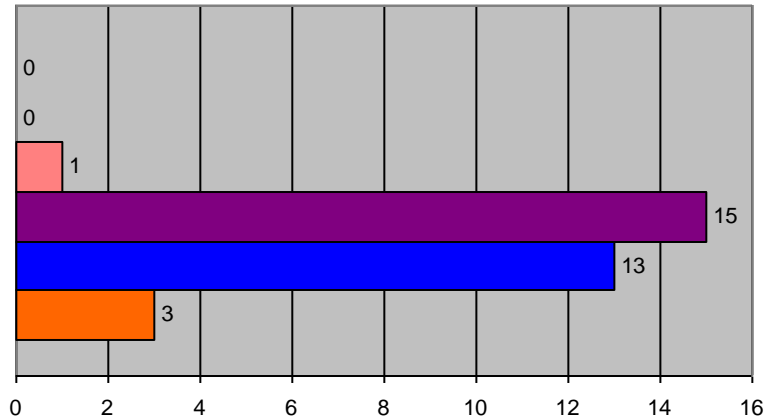


Schleswig-Holstein

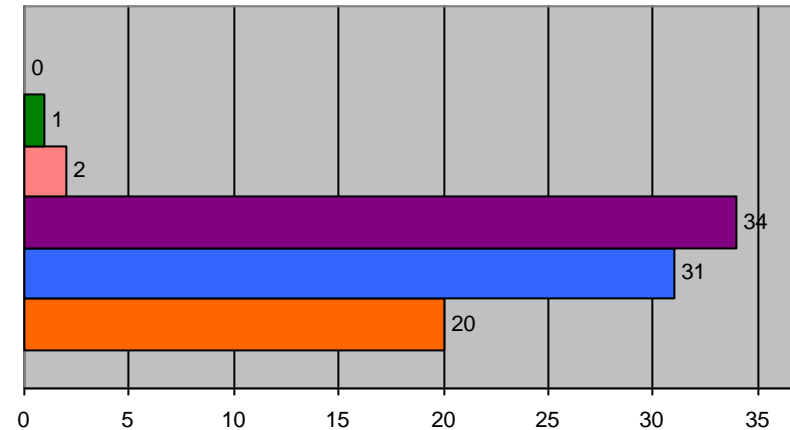


Can the World Heritage status build pride and self-confidence among the local community?

Lower Saxony



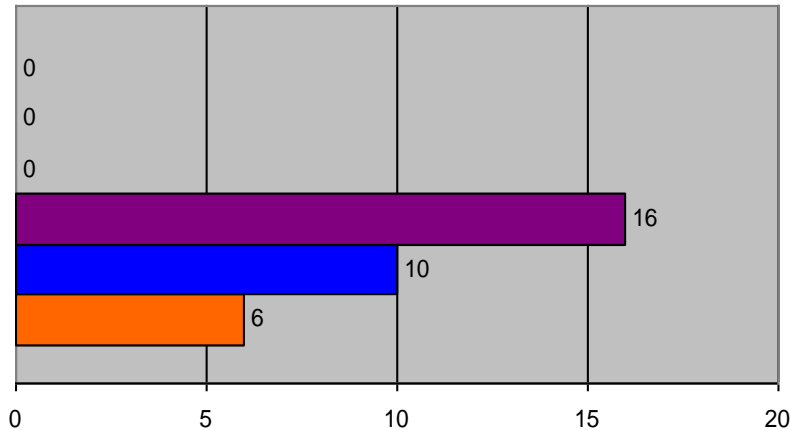
Schleswig-Holstein



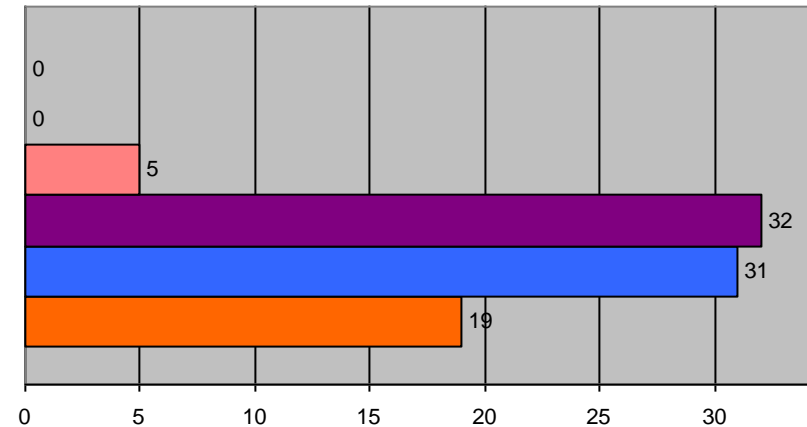
- no opinion; don't know
- no, not at all
- no, not much
- reasonably
- yes, mostly
- yes, to a large extent

Does it increase the inhabitants' understanding and responsibility for nature conservation?

Lower Saxony



Schleswig-Holstein



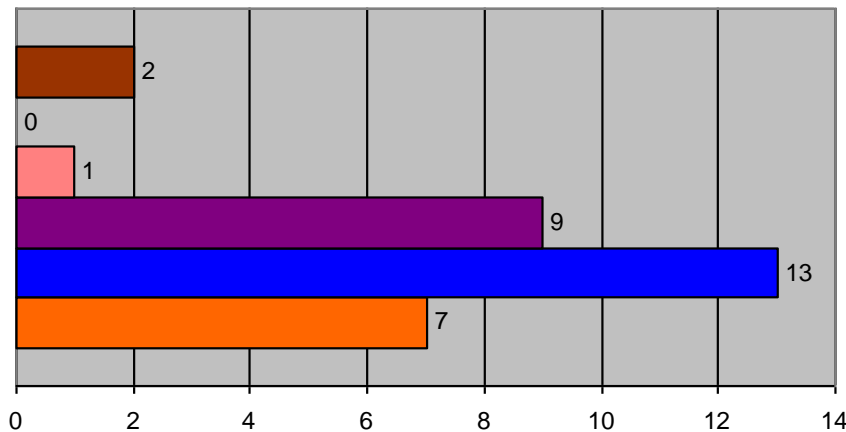
If yes, how can we create identity and sense of responsibility for nature conservation?

- **More knowledge** about particularities and global importance of the Wadden Sea and uniqueness of the natural World Heritage status
- **More regional public relations** / information sessions less closed / to use all kinds of **communication channels**
- Create positive **emotional connections** to the mud flats
- Integration of inhabitants into actions (including conservation) / **a more participative way**
- **More dialogue**: participation of the inhabitants into strategy and concept development
- **Added value**: residents must benefit from the World Heritage site

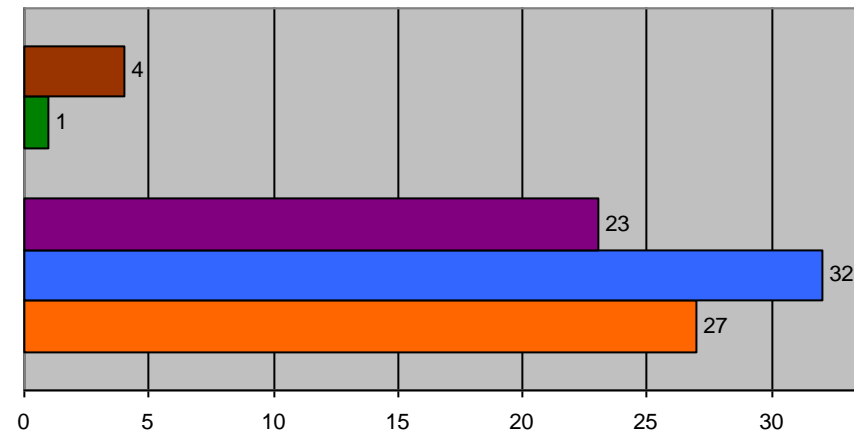


the potential of World Heritage status for the strengthening of partnerships - Can the World Natural Heritage status be an engine to start cooperation among stakeholders regionally?

Lower Saxony



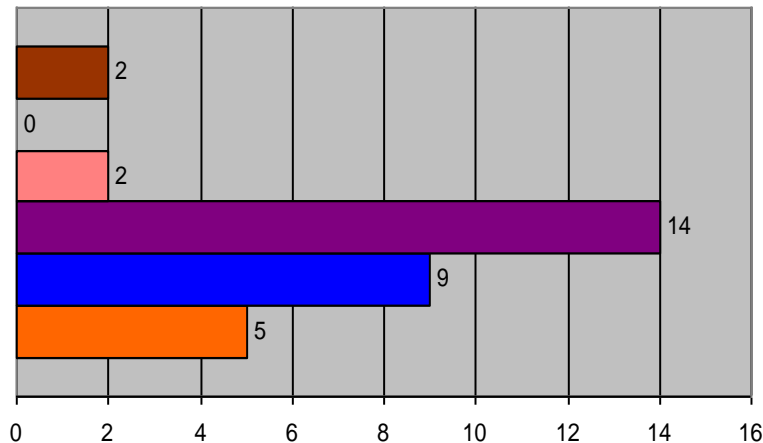
Schleswig-Holstein



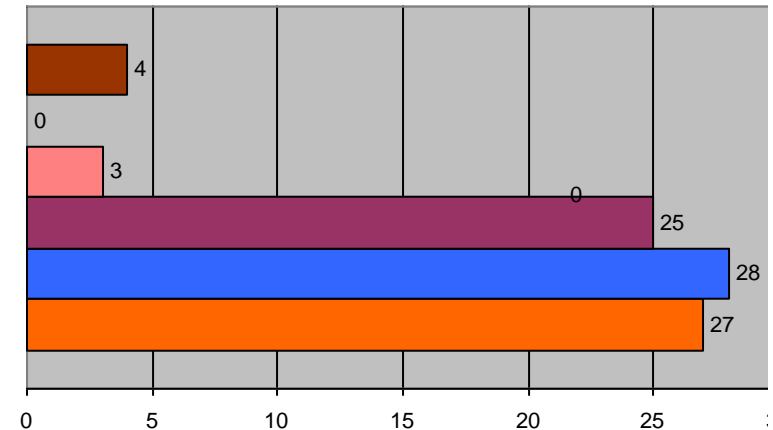
- no opinion; don't know
- no, not at all
- no, not much
- reasonably
- yes, mostly
- yes, to a large extent

Can the World Heritage status be an engine to start cooperation among stakeholders across the whole World Heritage site / at international level?

Lower Saxony



Schleswig-Holstein



- no opinion; don't know
- no, not at all
- no, not much
- reasonably
- yes, mostly
- yes, to a large extent

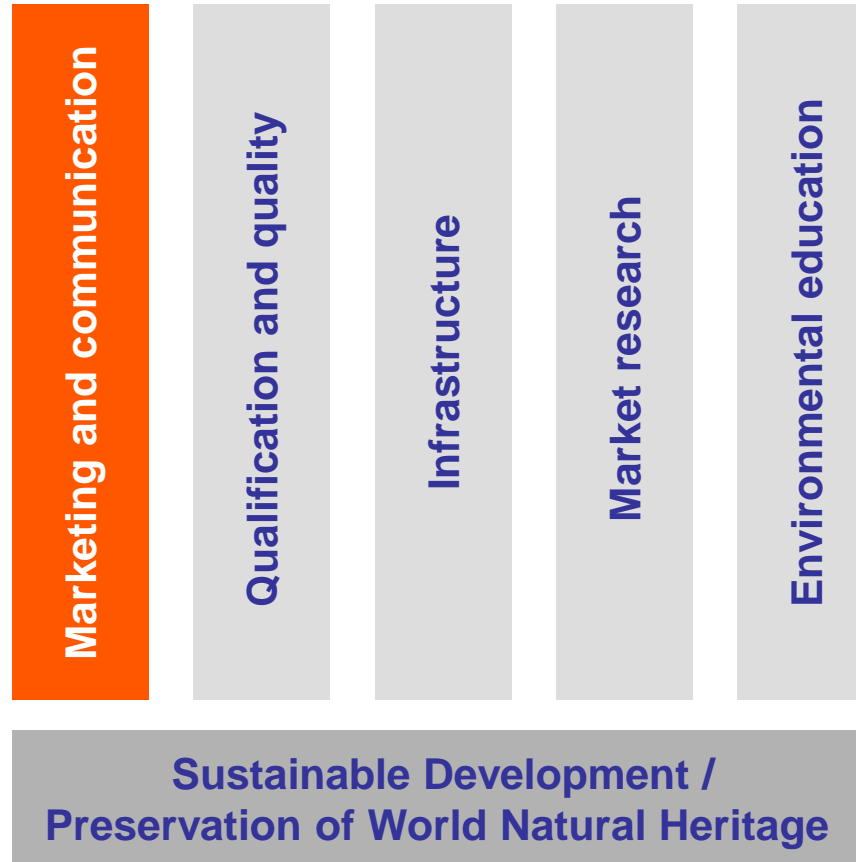
If the World Heritage status can be an engine for development of cooperation, how could this be implemented?

- **Multiplier groups** / to bring together stakeholders
- **Cooperation** of associations with local authorities
- Continuation of the **National Park Partnerships**
- Thematic **partner networks**
- **Common sustainable quality label** / World Heritage partners
- **Joint projects** (exhibitions, school projects, competitions)
- **Joint product development** / bundles
- **Joint marketing**, especially nationwide
- Expansion of **international cooperation**



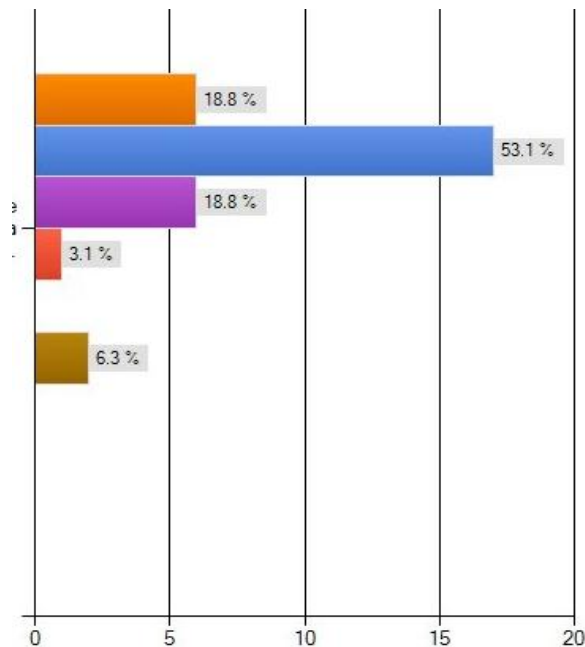
How can sustainable tourism contribute to the values / conservation of natural World Heritage?

- **Change in consciousness and awareness** for the preservation of the natural environment
- Internal and external communication: **preservation of the WHS = basis of the tourism / economic development**
- Tourism industry publicly must **occur for the goals of nature conservation / actively prevent harmful effects >> credibility!**
- **"More quality than mass"** with respect to the target groups
- **Sustainability of the entire service chain** from travel to accommodation, catering or local transport >> **"greening of the region" / leadership**
- **Visitor management**, information and nature experiences

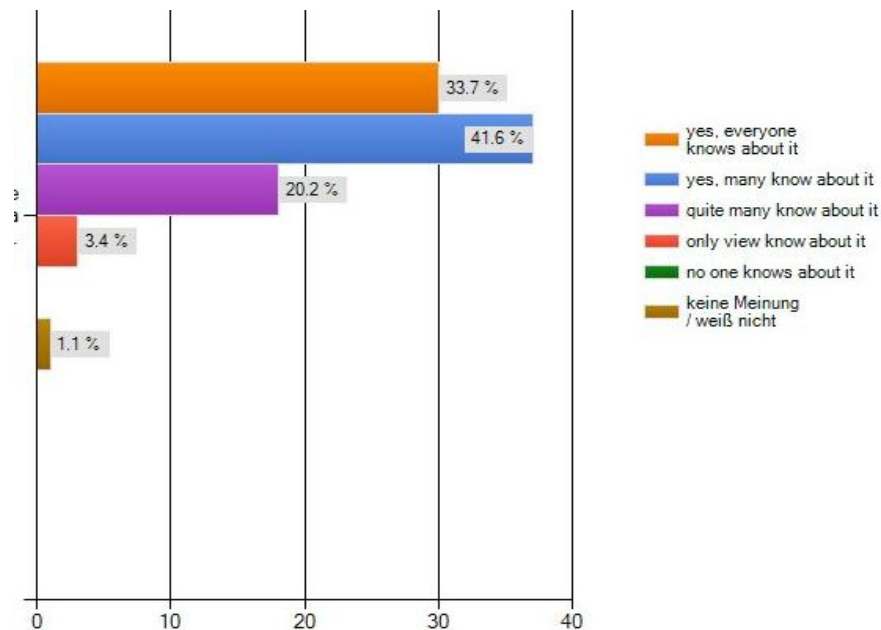


Is the World Heritage Status of the Wadden Sea Region well-known among tourism stakeholders in your area?

Lower Saxony

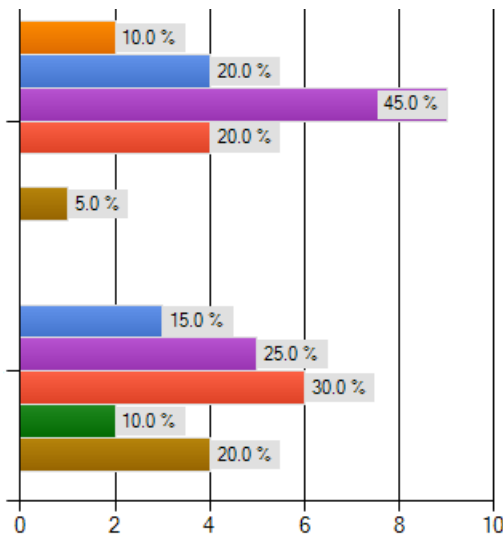


Schleswig-Holstein

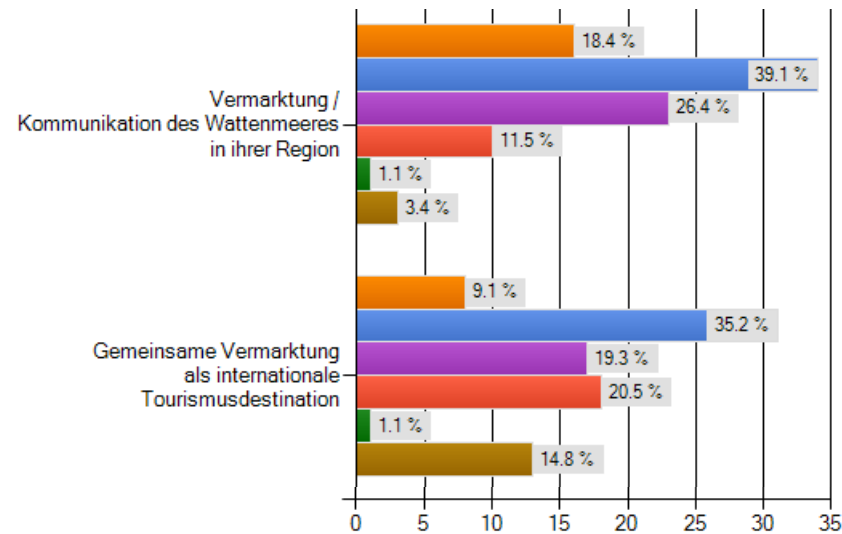


Satisfaction with the marketing and communication of the Wadden Sea in your area as holiday destination for experiencing nature...

Lower Saxony

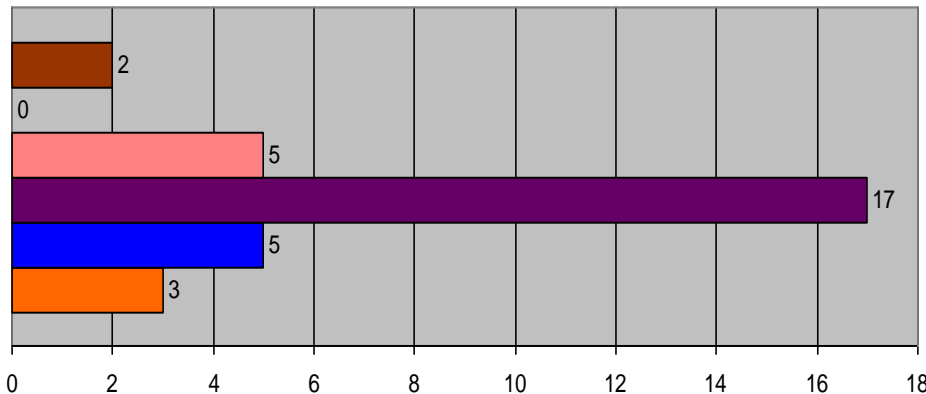


Schleswig-Holstein

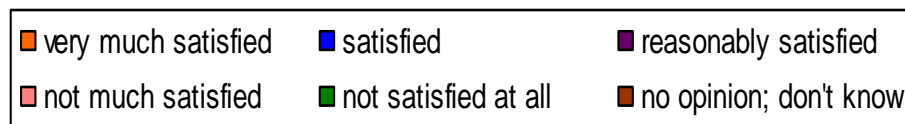
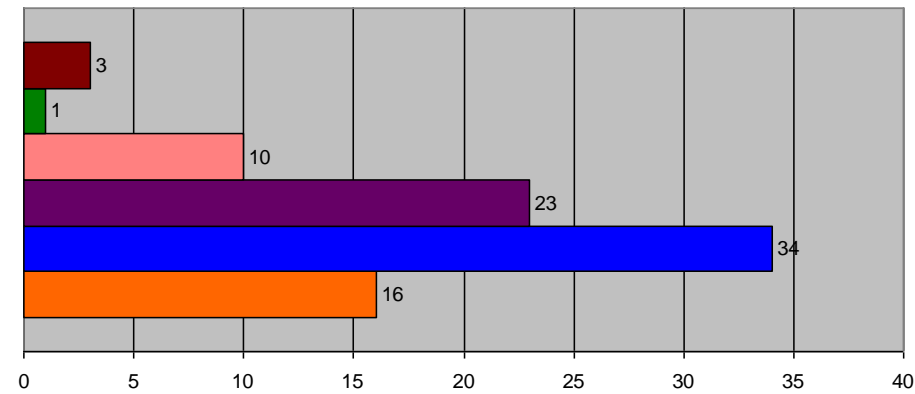


Satisfaction with the marketing and communication of the Wadden Sea in your area as holiday destination for experiencing nature...

Lower Saxony



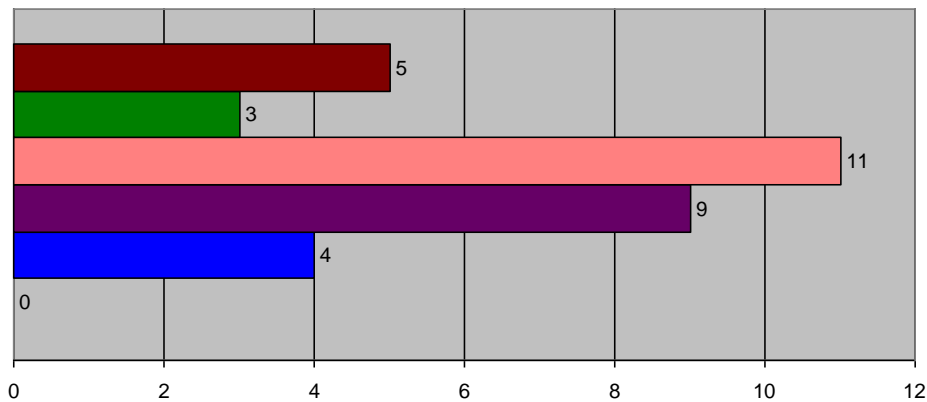
Schleswig-Holstein



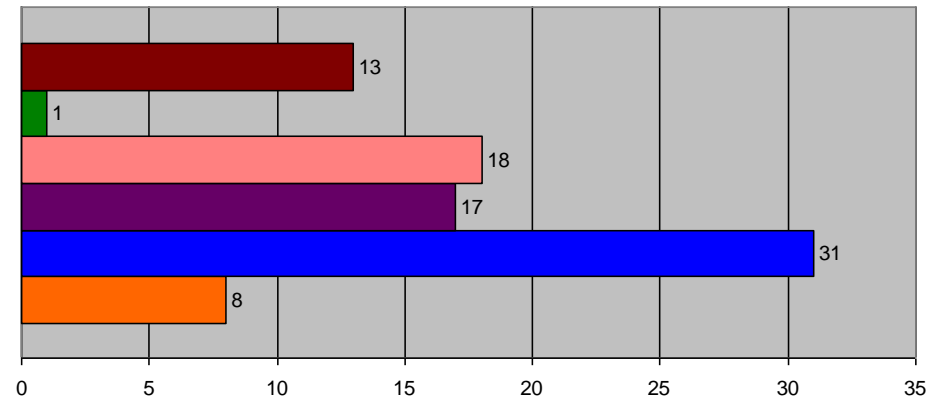
Survey: marketing & communication

Satisfaction with the joint marketing of the Wadden Sea as an international tourism destination...

Lower Saxony









Schleswig-Holstein



European Union  The European Regional Development Fund

Der Workshop wird im Rahmen des trilateralen Projektes "PROWAD – Protect and Prosper: Sustainable Tourism in the Wadden Sea" durchgeführt und wird teilfinanziert durch das Interreg IVB Nordseeprogramm

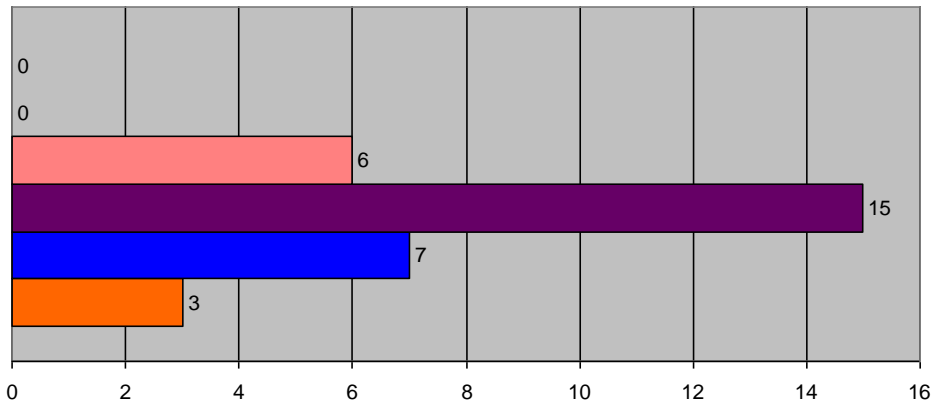


-  no opinion; don't know
-  not satisfied at all
-  not much satisfied
-  reasonably satisfied
-  satisfied
-  very much satisfied

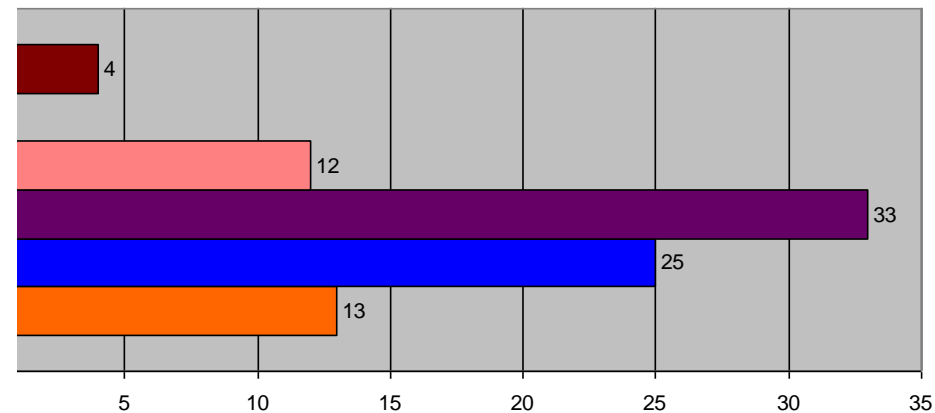
Survey: marketing & communication

Satisfaction with the marketing of the region as a World Heritage site as supporting USP / added value ...

Lower Saxony



Schleswig-Holstein



European Union  The European Regional Development Fund

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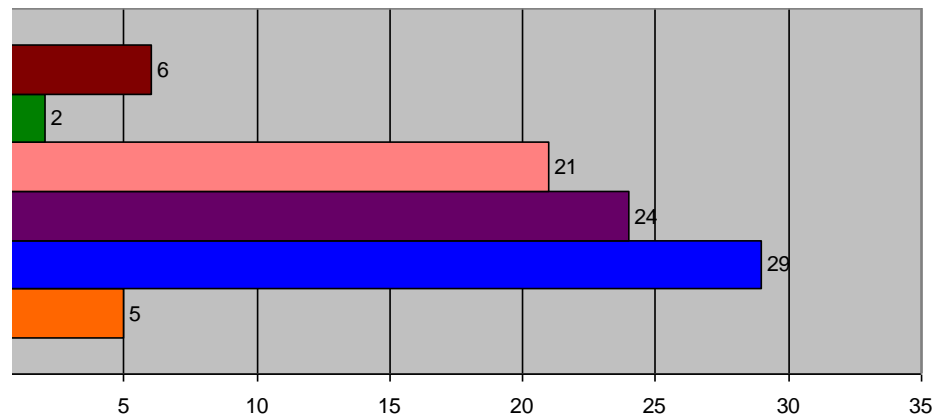
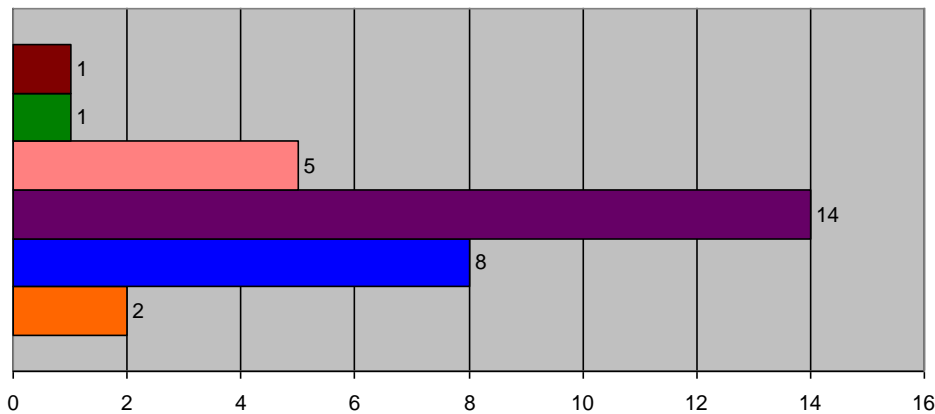
- no opinion; don't know
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- not much satisfied
- reasonably satisfied
- satisfied
- very much satisfied

Survey: marketing & communication

Satisfaction with the information, communication and ongoing activities by the regional tourist boards and tourism marketing organisations related to the World Heritage status within the region ...

Lower Saxony







Schleswig-Holstein



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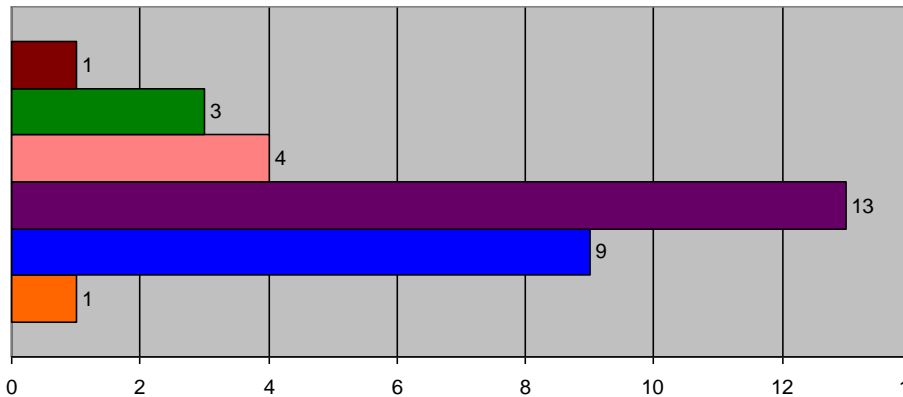
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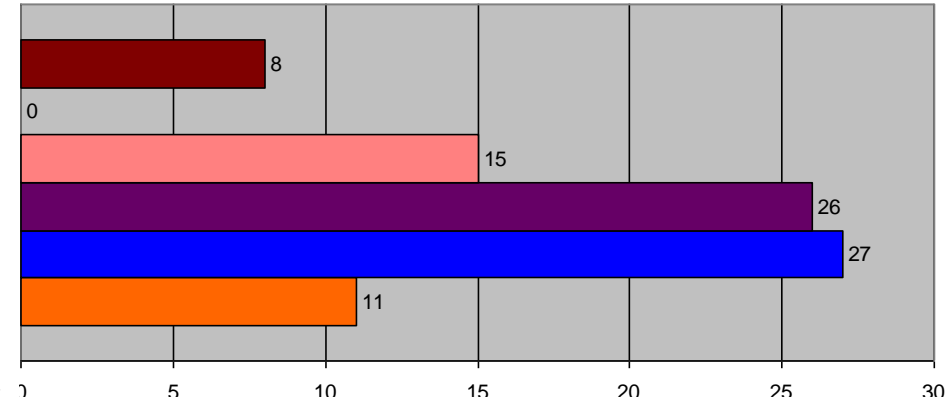
-  no opinion; don't know
-  not satisfied at all
-  not much satisfied
-  reasonably satisfied
-  satisfied
-  very much satisfied

Satisfaction with the information, communication and ongoing activities by protected area administrations related to the World Heritage status within the region ...

Lower Saxony



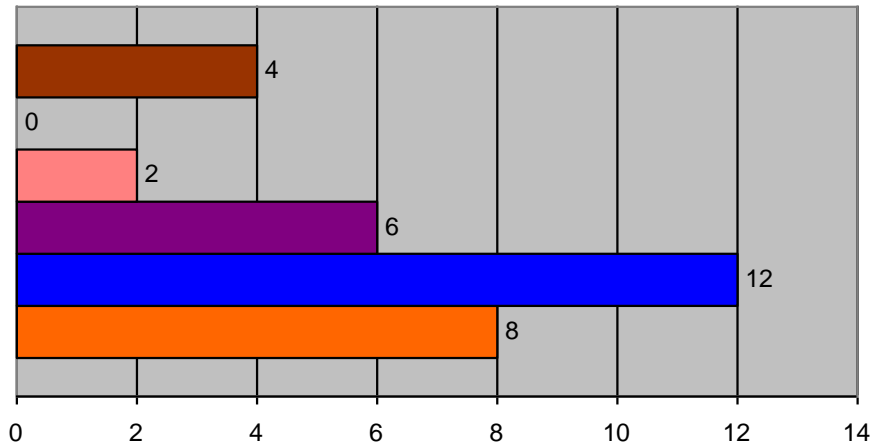
Schleswig-Holstein



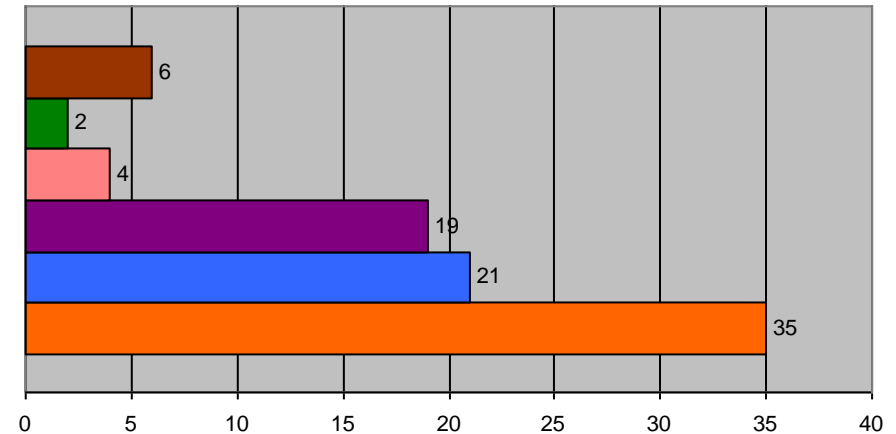
- no opinion; don't know
- not satisfied at all
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- satisfied
- very much satisfied

Can the World Heritage status be a tool to establish a joint marketing platform?

Lower Saxony



Schleswig-Holstein



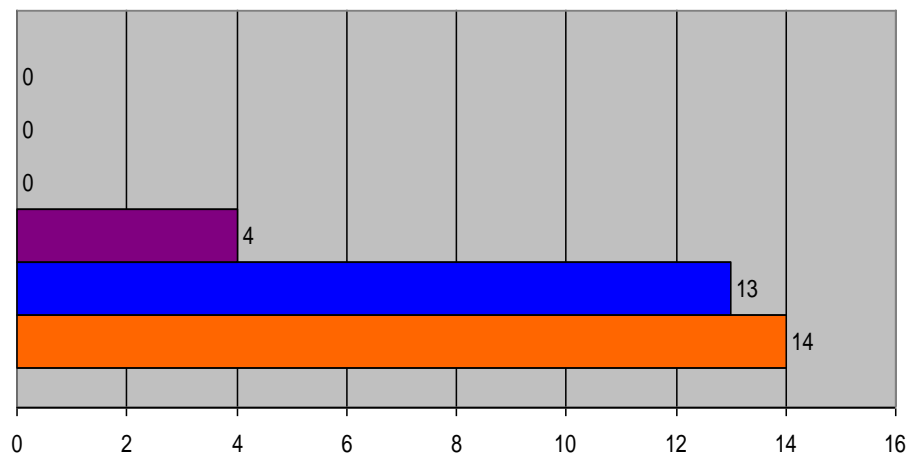
- no opinion; don't know
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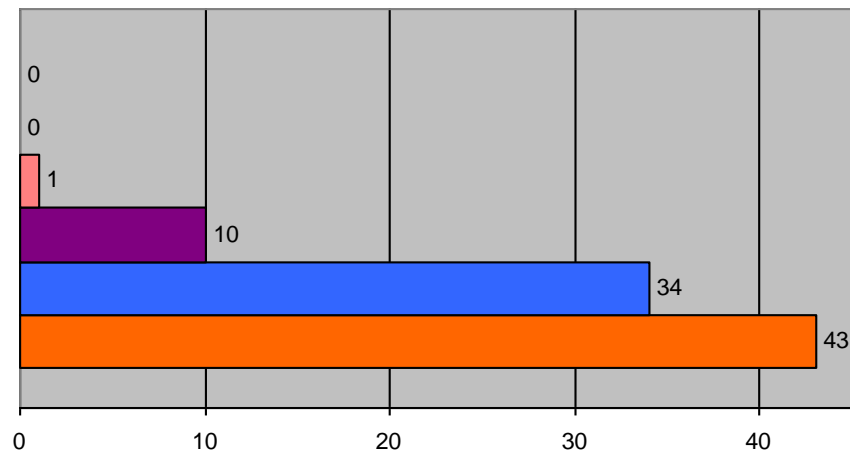
Survey: marketing & communication

Can the World Heritage contribute to raising public awareness of the significance of the whole (trilateral) area?

Lower Saxony



Schleswig-Holstein



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- no opinion; don't know
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What do you think works well in the marketing of the Wadden Sea World Heritage?

- Strengthening of **USP** / positive image and brand awareness increased
- **Communication** (working groups, information sessions, “Wadden Sea working group”.....)
- Good cooperation in the regions
- **Storyteller campaign** / holiday magazine
- Small Five, Big Five & Flying Five offers
- Sufficient **information material** on site
- uniform posters and ads, banner ads, flyers advertising / **common logo** / **joint website**



Where do you see gaps in the marketing of the Wadden Sea?

- **Lack of joint performance** of the regions and destinations: not understandable for the guest
 - Parochial thinking of the communities, counties and states
 - „Marketing in SH good, in NS fairly good, in NL bad & in HH not existing“
 - Too many individual activities
- Advertising approach with a **focus on recreation and less on experience / emotion neglected**
- **Credibility of the marketing messages** requires sustainable offers
- Wadden Sea region as destination for nature tourism not known **in travel agencies**

Where do you see gaps in the marketing of the Wadden Sea?

- **Insufficient information** in the tourist resorts / marketing of the Wadden Sea and World Heritage status is not remarkable on the sites and is missing among the tourism stakeholders
- Lack of information in **customer service**
- **Internet offers** expandable: findability & offering of the NP-sites
- **Addressing of international guests** is missing (DK, Dutch, GB)
- Language problem / **lack of multilingualism on site**
- Win residents as **multipliers**
- **Single destinations / „Lighthouses“** are too much in the **spotlight**
- Only little attention to the Wadden Sea`s potential as destination for **health tourism**



What suggestions and ideas do you have for improving the marketing of the Wadden Sea / Wadden Sea World Heritage?

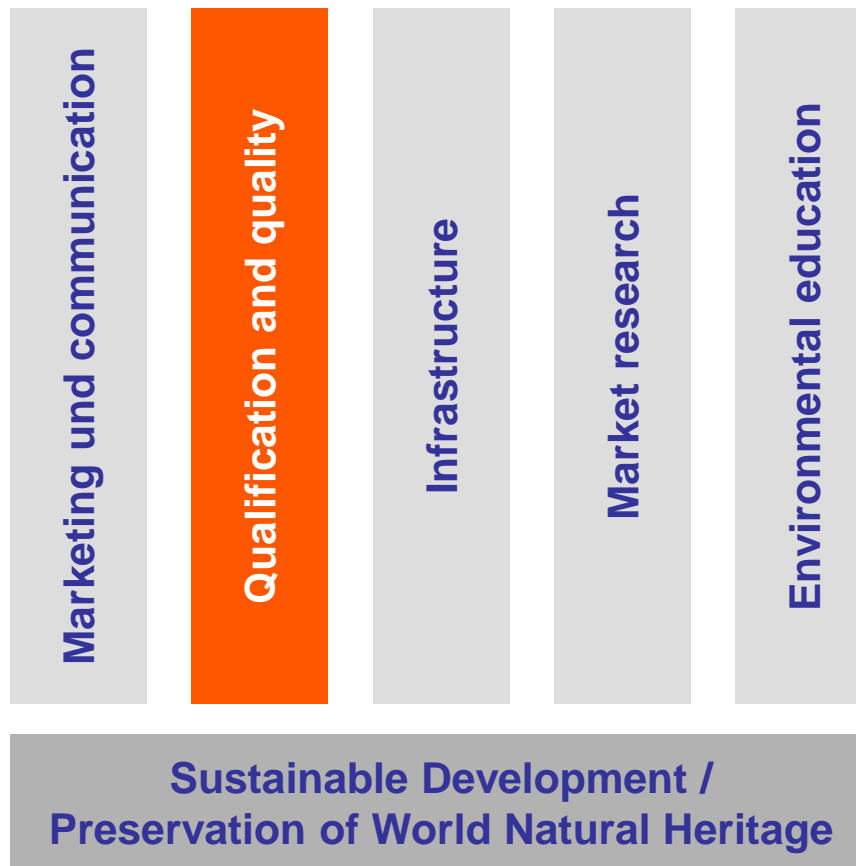
- **Emphasize more the USP Weltnaturerbe Wattenmeer**
 - Note on World Heritage Site **in any communication** / use of logos and banners!
 - To have the **same information and promotional materials (multilingual)** in all tourist information centers
 - Uniform name signs / information system, etc.
 - increased use of the WH status in the **internal marketing** / to integrate **provider & services on site**
- More basic work: make **offers more sustainable** (regional cuisine, culture and folklore, region-based features) **>> credibility!!**

What suggestions and ideas do you have for improving the marketing of the Wadden Sea / Wadden Sea World Heritage?

- **Strengthen the international marketing**, in particular with a focus on nature tourists including image >> "last wilderness of Central Europe" and / sustainable enjoyment of nature and nature experience
- **Create offers for international guests**
- **To improve Nationalpark-Partnerschaft** / to acquire further partners
- **Training** of employees in the tourist information centers
- **Bundling** of offers from all regions / increase **transparency**
- **To promote all offers of the region**, not only „lighthouses“
- **To achieve the same level in all marketing regions** / faster implement



Qualifizierung und Qualität



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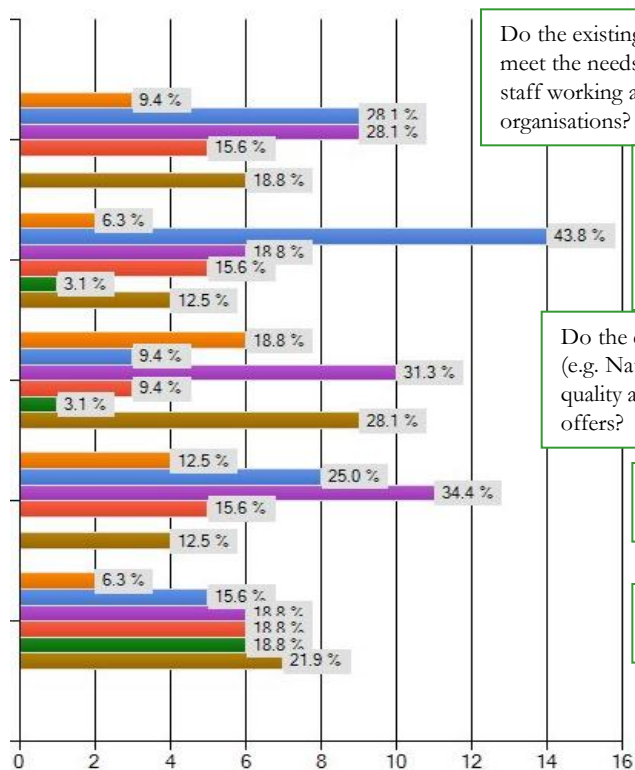


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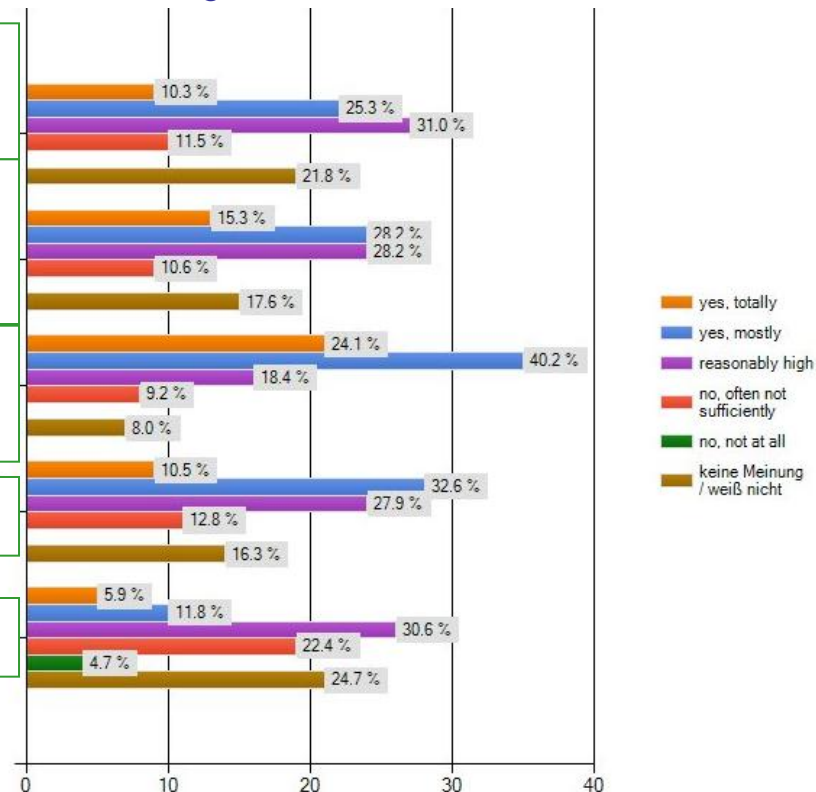
10 YEARS 2001-2011

Opinion of current quality standards in tourism, existing quality assurance systems, and training opportunities for staff training of tourist...

Lower Saxony



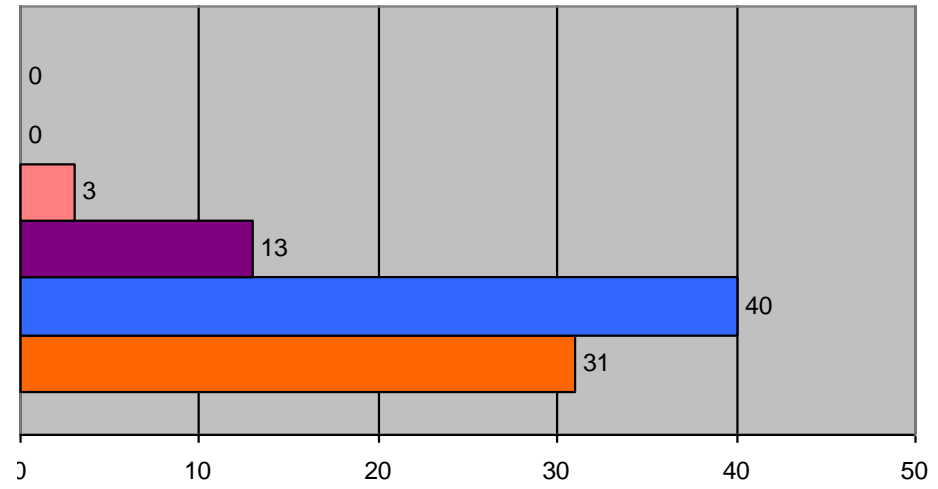
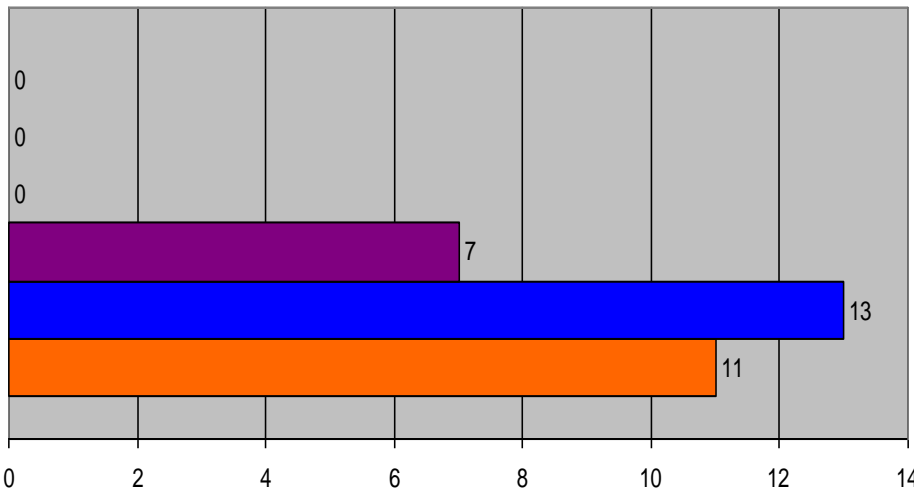
Schleswig-Holstein



Can the World Heritage help to increase quality standards of the nature experience and of the sustainable tourism infrastructure?

Lower Saxony

Schleswig-Holstein



- no opinion; don't know
- no, not at all
- no, not much
- reasonably
- yes, mostly
- yes, to a large extent



What works well in your area regarding training and quality control?

- **Nationalpark-partnership-programme**
- **NP-seminars & annual events** between tourism and national park
- **Training of tour guides - NP-Watt guides**
- **Wide range of regional education opportunities** in tourism
- **Training** of apprentices
- **classification, Viabono, Service Q, quality criteria of the Nationalparks**
(but quality control not sufficient)

Which qualification demand is there in national parks, tourism and marketing organizations and among tourism service providers?

- **ongoing training /continuing education**
- **To reach more participation of hosts and staff in training courses >> to break the indifference of the stakeholder**
- **Information about the whole tourism offer (tourist information centers!)**
- **Topic trends and changes in values!**
- **English >> active use!**
- **Service quality & increase in guest satisfaction**

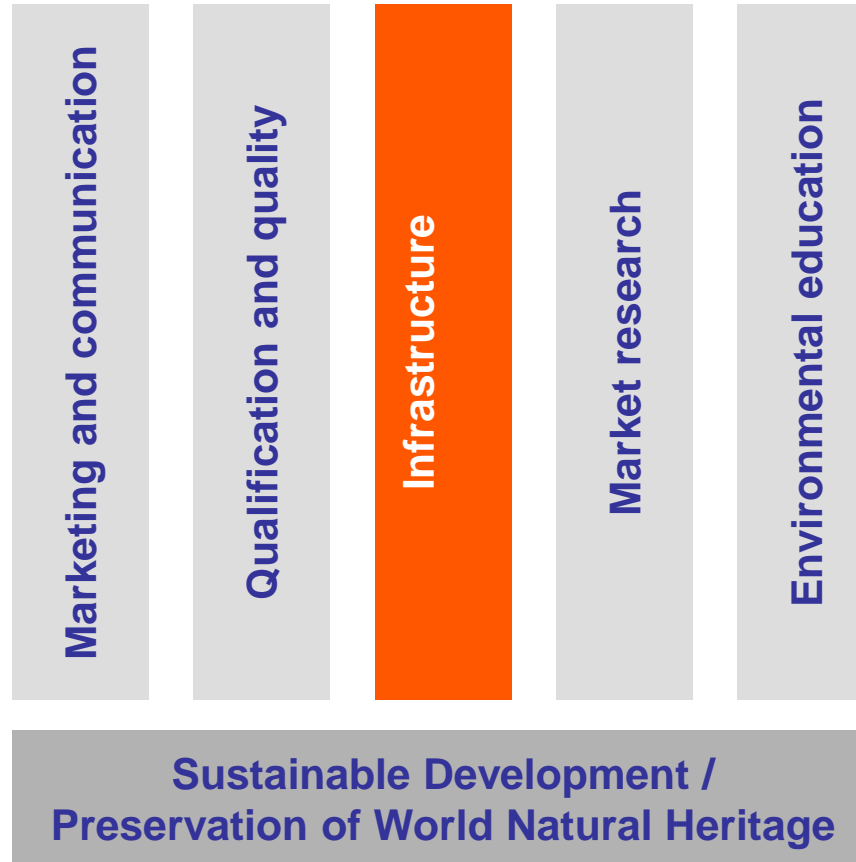
Which qualification demand is there in national parks, tourism and marketing organizations and among tourism service providers?

- **Meaning / importance of Wadden Sea and World heritage** (for use in the guest information)
- **Conservation in National Park**
- **Environmental and climate protection in the enterprises**
- **Importance of nature (and their protection / preservation) for the tourism / implementation of sustainable offers / nature experiences**
- **regional products**
- **employee satisfaction**
- **Events for the exchange of educational institutions / visitor centers on presentation of World Heritage Sites / info material equipment**



What other suggestions and ideas do you have for the improvement of existing training programs (including on World Heritage Wadden Sea), quality standards and quality control systems?

- **Barriers** to entry for tourism providers often too high >> start small
- **better dissemination of information** about occurring events and training
- **more Nationalpark-partner in the catering and accomodation sectors** >> introduce more quality & eco-label to accomodation providers / actively address
- **Focus on sustainable standards** >> evtl. introduce Viabono in NS
- **Implementation of sustainability:** EMAS, CO2-footprint, Green power, measures in compensation, energy efficiency, energy, water and waste management etc.

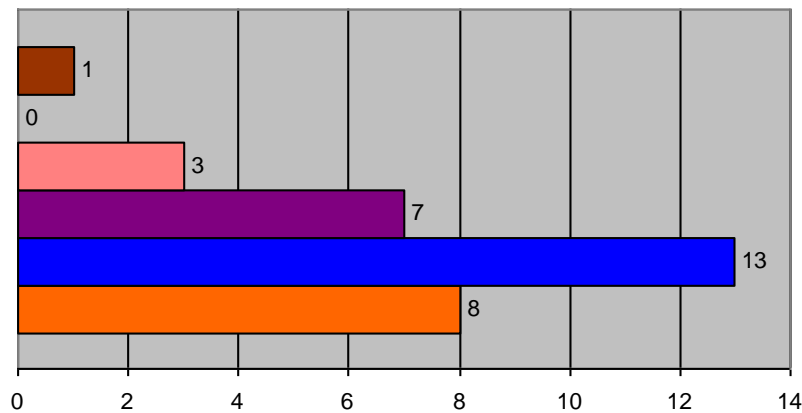


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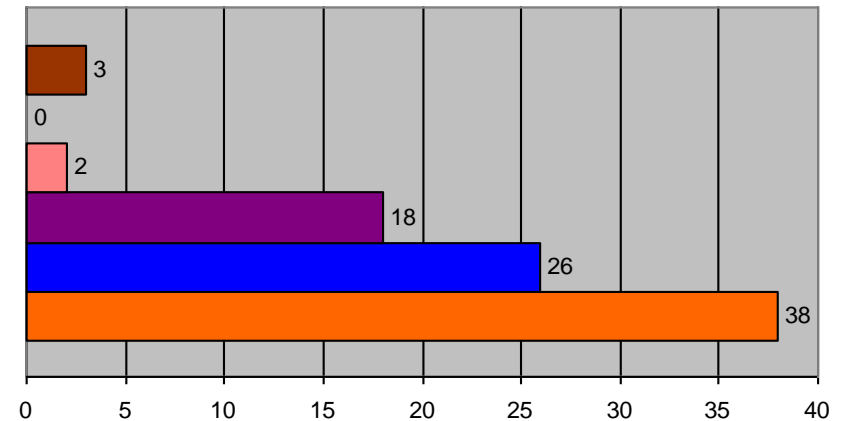


Can the World Heritage status be a tool to generate investments in sustainable tourism infrastructure?

Lower Saxony



Schleswig-Holstein

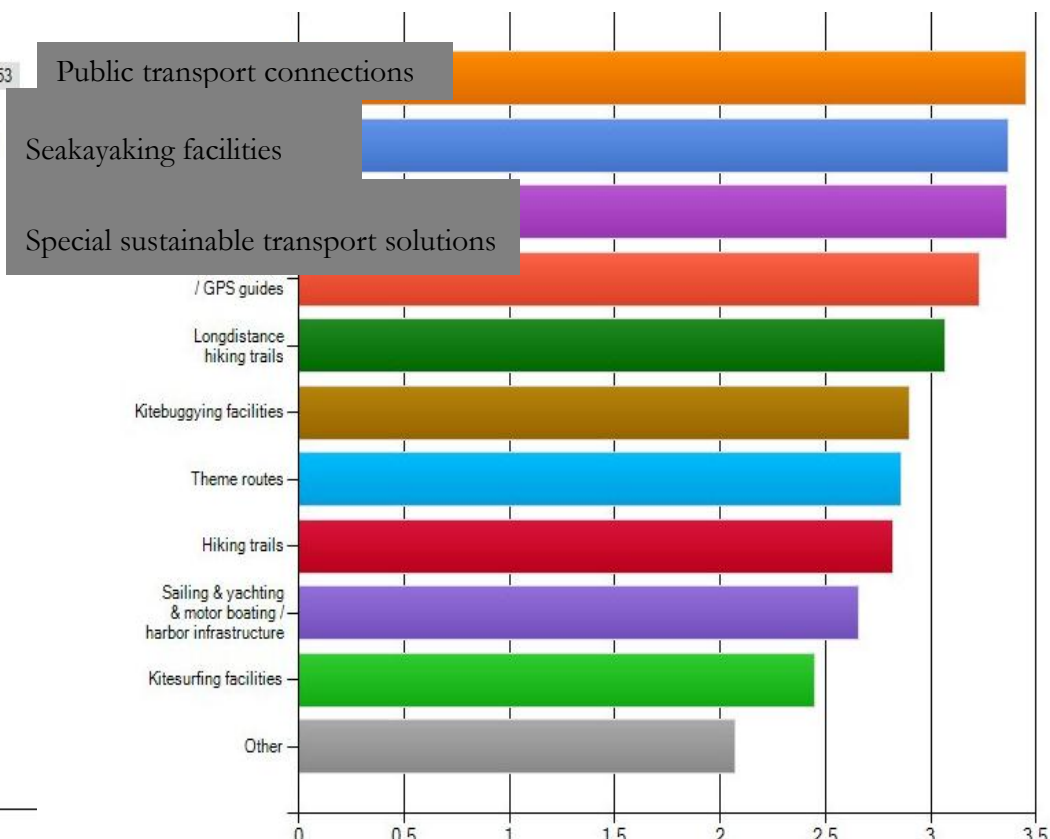
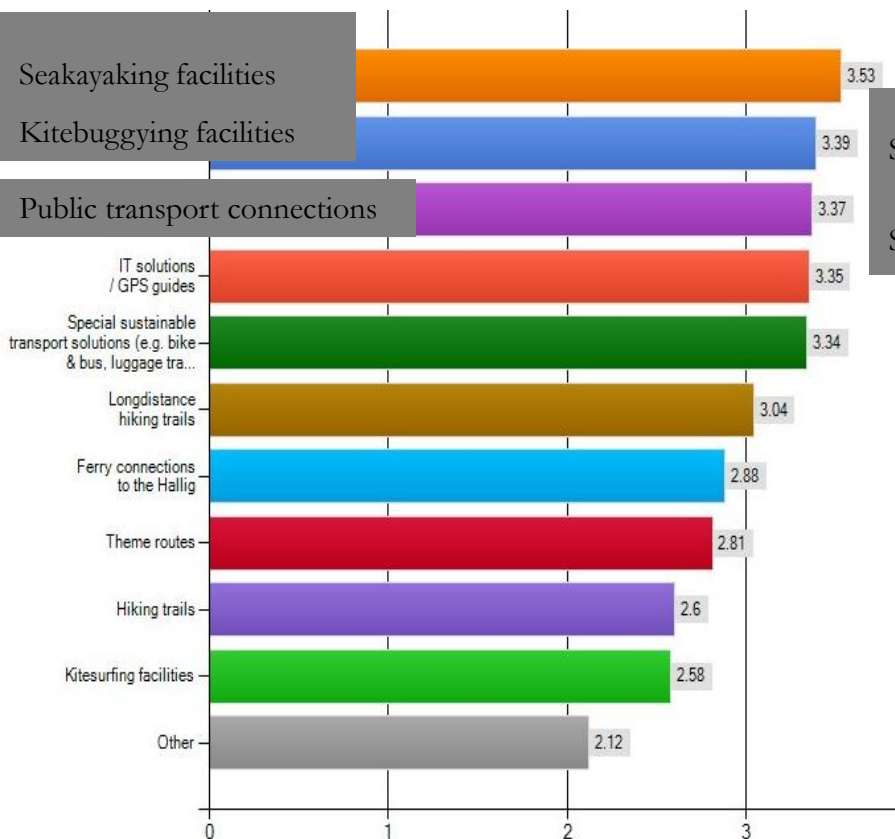


- no opinion; don't know
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- no, not much
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Evaluating the quality of infrastructure services...

Lower Saxony

Schleswig-Holstein



Where do you see gaps in the tourism infrastructure for nature experiences?

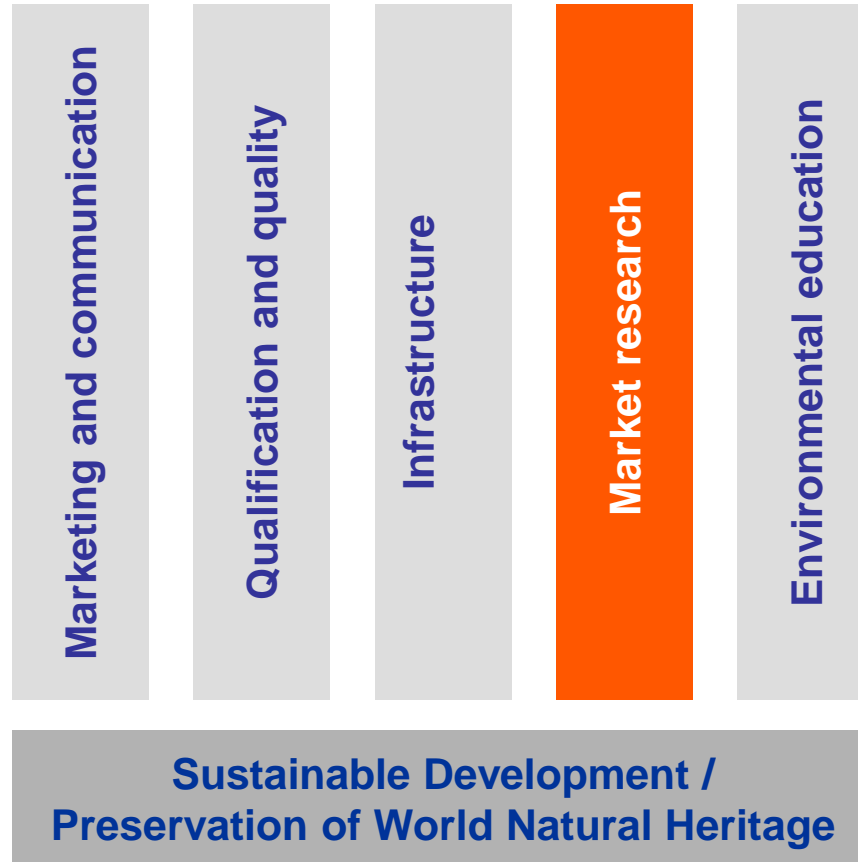
- **Public transportation** (car-free nature experience hardly possible) & **passenger information**
- **Shuttle bus to the ferry** missing
- very few **bicycle rental stations** on the mainland and **bed & bike companies**
- **Route signs / uniform signage**
- **Visitor information / nature trails / experiences to touch**
- **Information points** with near-natural viewing platforms
- **quality trails / lack of footpaths** and **theme routes behind the dike**



Where do you see gaps in the tourism infrastructure for nature experiences?

- **Quality of smaller accommodation providers**
- **Clear supply and prohibition zones for fault-intensive sports**
- **Beach entrance and fences are not acceptable**
- **Poor infrastructure in bathing areas (toilet and shower facilities)**
- **Internet offers not sufficient**



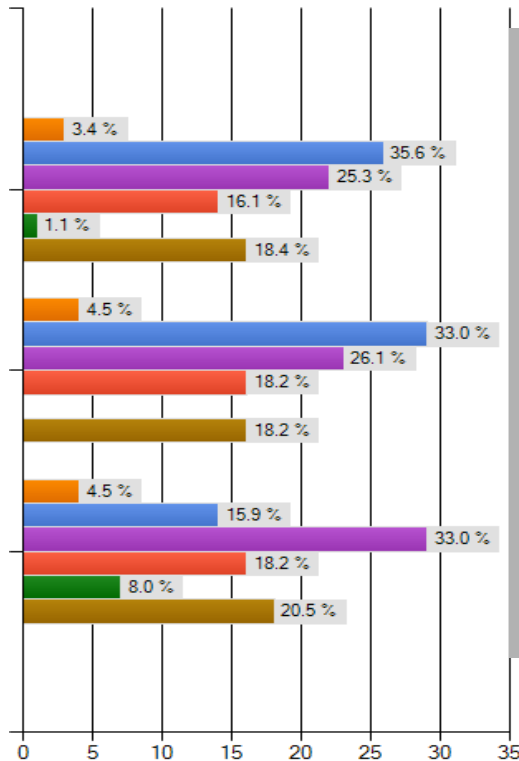


Der Workshop wird im Rahmen des trilateralen Projektes "PROWAD – Protect and Prosper: Sustainable Tourism in the Wadden Sea" durchgeführt und wird teilfinanziert durch das Interreg IVB Nordseeprogramm



Views about current market research and tourism data as an information base to improve the tourism offers in the region...

Lower Saxony

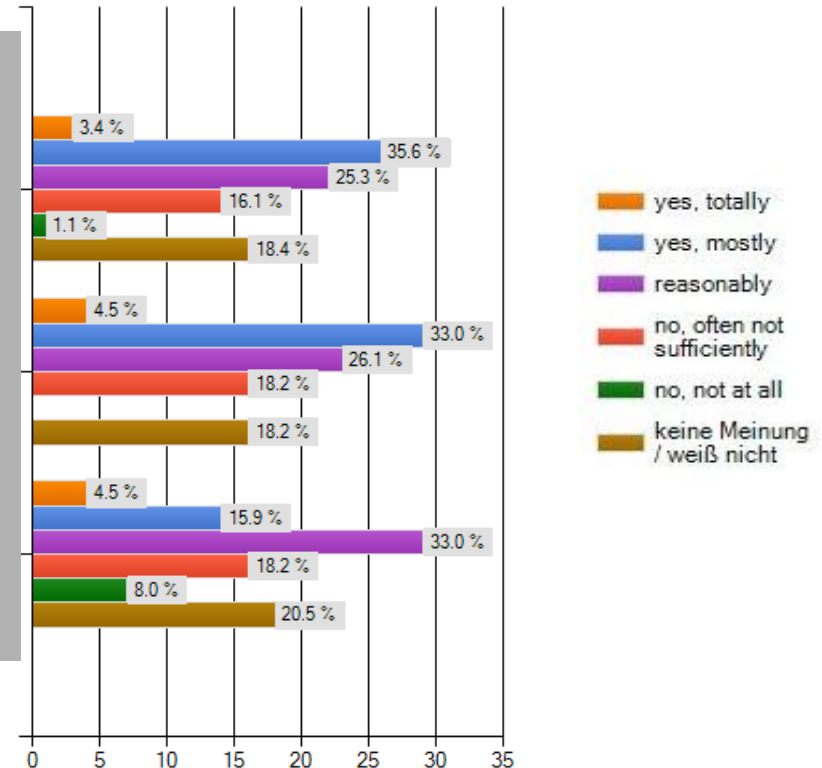


Available data from market research is generally delivering a sufficient information base?

Existing market research is delivering sufficient information about relevant target groups, target markets and visitor perceptions in the nature tourism segment?

It is easy to get access to and share existing market research data?

Schleswig-Holstein

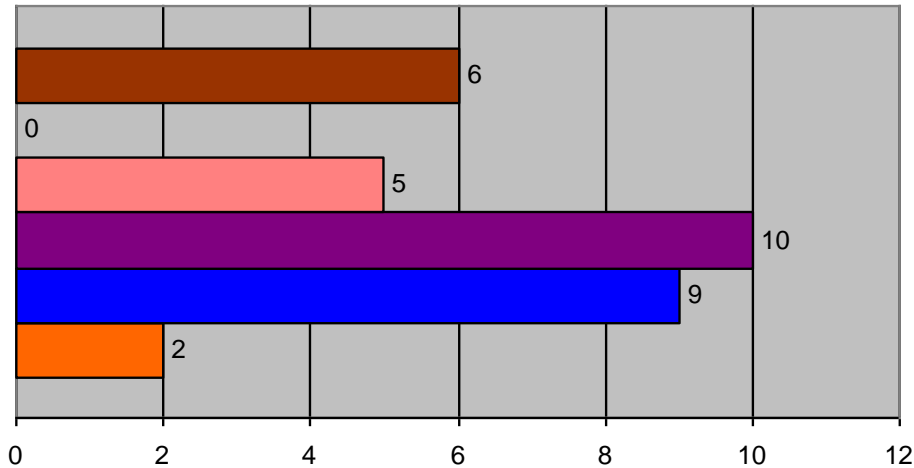


- yes, totally
- yes, mostly
- reasonably
- no, often not sufficiently
- no, not at all
- keine Meinung / weiß nicht

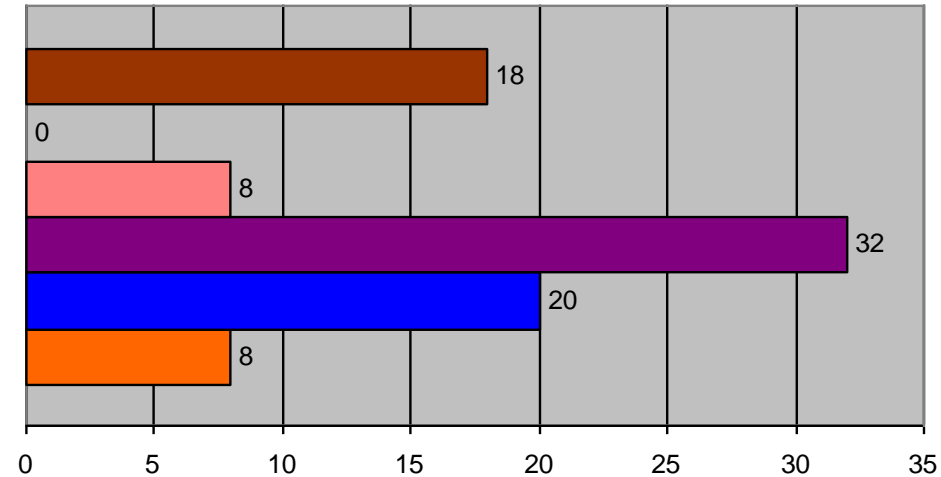
Survey: market research

Do you think the existing market research is delivering sufficient information about image and name recognition of the Wadden Sea / World Heritage Site?

Lower Saxony



Schleswig-Holstein



- no opinion; don't know
- no, not at all
- no, not much
- reasonably
- yes, mostly
- yes, to a large extent



European Union  The European Regional Development Fund

Der Workshop wird im Rahmen des trilateralen Projektes "PROWAD – Protect and Prosper: Sustainable Tourism in the Wadden Sea" durchgeführt und wird teilfinanziert durch das Interreg IVB Nordseeprogramm



Where do you see gaps in the market research? / What suggestions and ideas do you have for improvement?

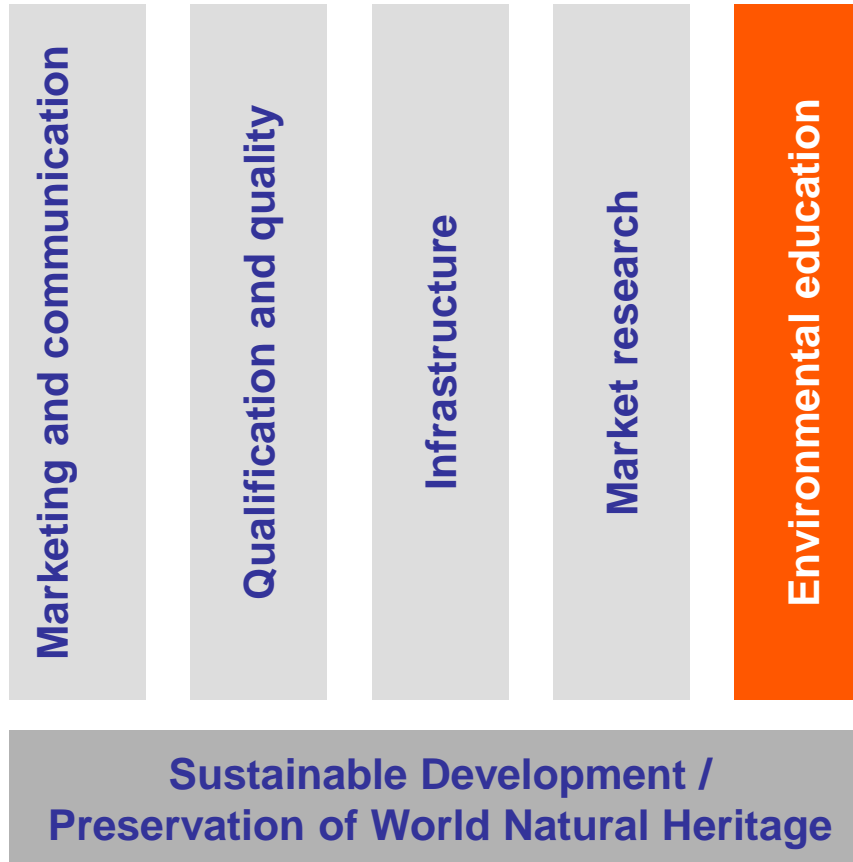
- More regular and comparable **guest surveys** on site
- **Trend research** is neglected (values change in demand)
- **consistent record of visitor numbers** of information centers and guided tours on nature studies
- Evaluation of **bookable offers**
- Market research on **ethical consumption** in tourism
- Survey of all tourism **stakeholders**
- **Accessibility of research results** and dissemination of information to communities and tourism service providers
- **Money for good market research** is often absent



Where do you see gaps in the market research? / What suggestions and ideas you have for improvement?

- **Wadden Sea wide harmonized market research (German-Danish-Dutch)**
- **Tool for measuring the sustainability of the offers**
- **Studies on the effects of World Heritage recognition (world heritage as a travel theme?, specific target groups and source markets, value-added effects ...)**
- **Guest expectations on the Wadden Sea region (compared to the North Sea)**
- **international source markets research (Asia, North America / potential for World Heritage Packages)**



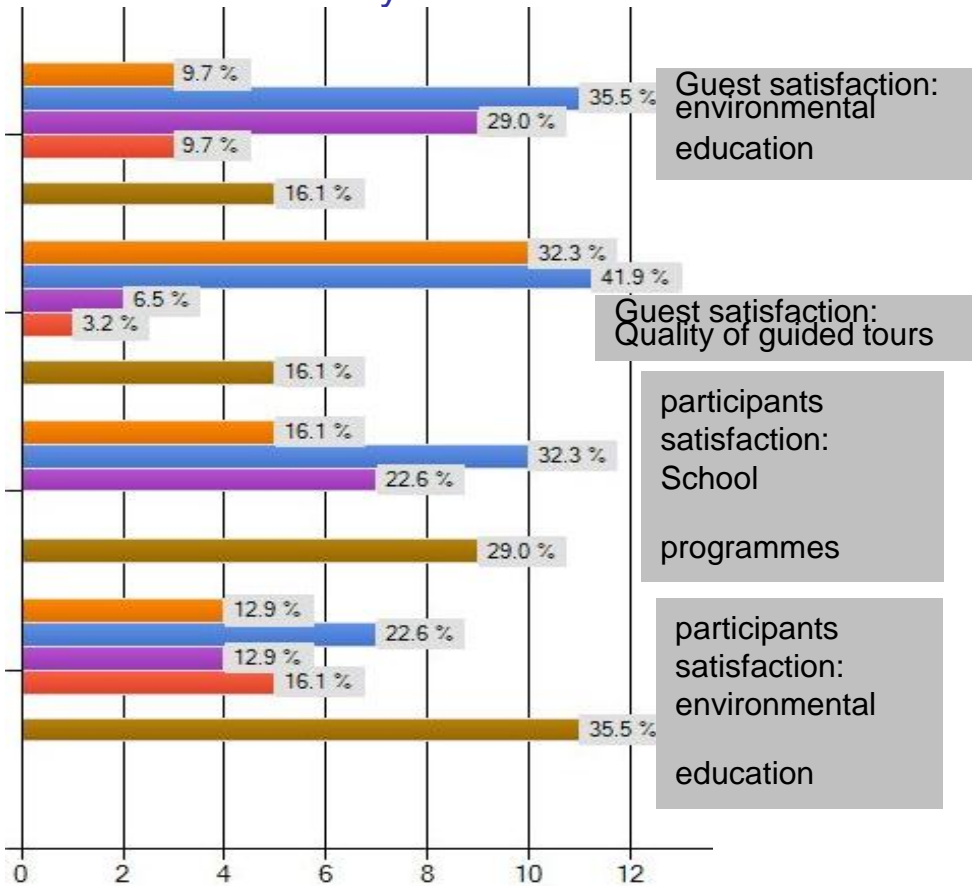


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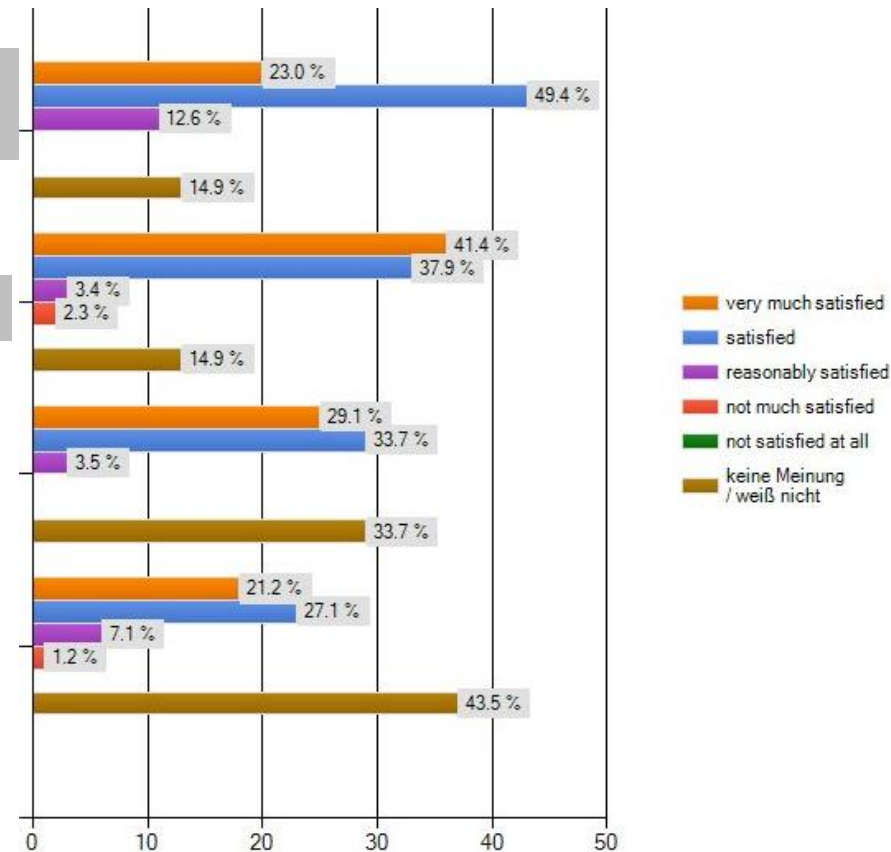


Views about current environmental education and interpretation...

Lower Saxony

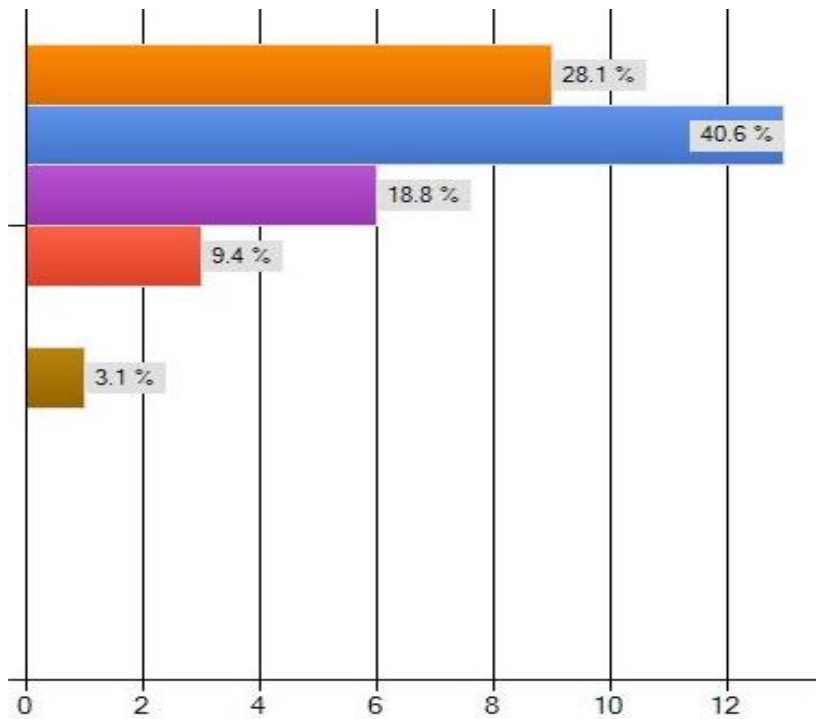


Schleswig-Holstein

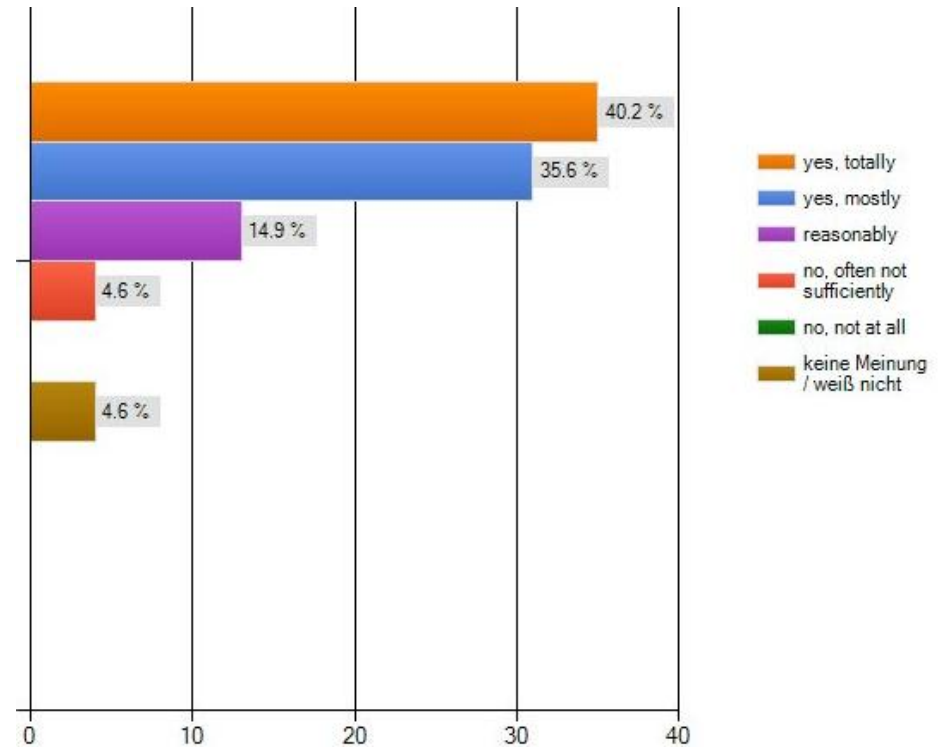


Do the existing environmental education and nature experience offers contribute to safeguarding the world heritage / sustainability of tourism?

Lower Saxony

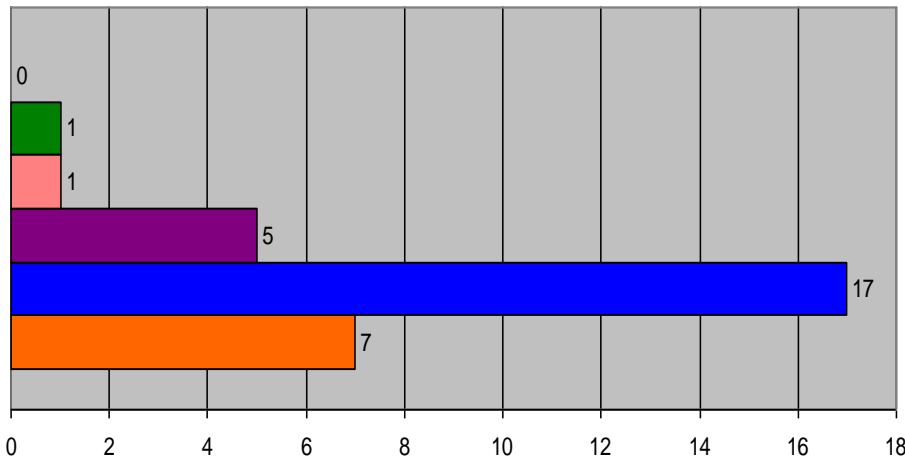


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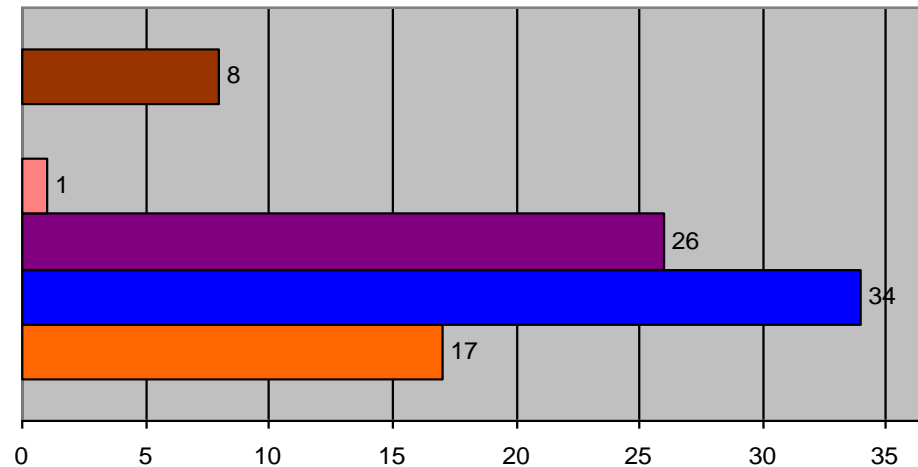


Do the existing visitor information and edutainment offers contain the World Heritage as theme?

Lower Saxony



Schleswig-Holstein



- no opinion; don't know
- no, not at all
- no, not much
- reasonably
- yes, mostly
- yes, to a large extent

How should the Wadden Sea (better) to be integrated into the visitor information and edutainment offerings? What should be done about it?

- To install information points in still more places
 - e.g. also use the "gates" to the islands and islets
 - **Unique visitor information system** in all regions including infos about sub-regions
- Reasons for award / **highlight uniqueness of the World Heritage**
- Continuation of the intensive **cooperation of the visitor centers** throughout the Wadden Sea / regular meeting & information exchange
- Further development and strengthening of the **IWSS as a platform for World Natural Heritage education**



How should the Wadden Sea (better) to be integrated into the visitor information and edutainment offerings? What should be done about it?

- **Developing offers to be used by/in all information centers**
- **Education and information materials for student / teacher posters**
- **Wadden Sea wide projects, e.g. "Beach Explorer"**
- **Communication of sustainable offers**
- **World Heritage topics to include in the offers**
- **Thematize more the 5 ambassadors of the world heritage**

Environmental impacts of tourism activities on the sites:

- Construction projects in the tourism sector
- Major events
- Kite-surfing
- Wind-surfing
- Kite-Buggy
- Sailing
- Sea-kayaking
- Motor boating, jet-ski
- Light aircraft / private aircraft
- Micro-light aircraft
- Boat Trips
- Fast ferries
- Large visitor numbers on summerdays
- Kite flying
- Entering protected areas away from marked trails
- Hiking on marked trails
- Unleashed dogs
- Guided walks across the mudflats
- Walks across the mudflats without a guide

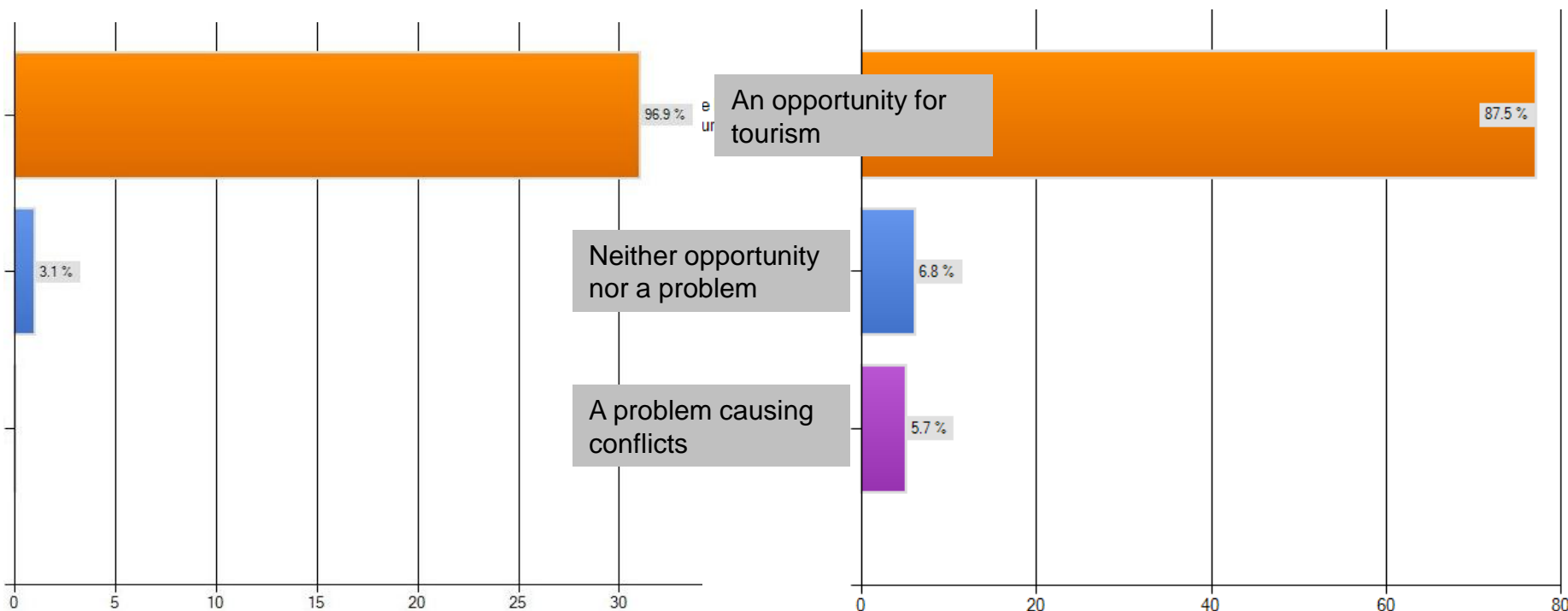
>> evaluation of a regional Wadden Sea survey among nature reserve managers (WWF)



Do you see the World Heritage Status of the Wadden Sea area as an opportunity for a tourism development or rather as a problem?

Lower Saxony

Schleswig-Holstein

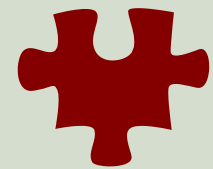


Impact of the World Heritage status on the tourism development in the Wadden Sea Region - What potential for conflict do you see?

- Fear among providers of **requirements and regulations** - restricting the development of tourism by restricting the useability of the watt-related areas
- Accurate **testing and assessment of structural measures** involves conflicts of interest
- **Lack of awareness** of the tourists of sensitive habitat
- **Disturbance of nature** when tourism is undirected & with lack of information

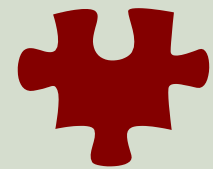
Impact of the World Heritage status on the tourism development in the Wadden Sea Region - What potential for conflict do you see?

- By marketing **reason for the world heritage recognition in the background** (global uniqueness of the ecosystem)
- **Selective congestion** of the Wadden Sea in hot spots
- Risk that **too many different levels of quality and sustainability** will be combined under the label "World Heritage"
- Danger of using **World Heritage only as an advertising label**, ignoring obligations to >> too large visitor numbers vs. sustainability >> unguided mass tourism



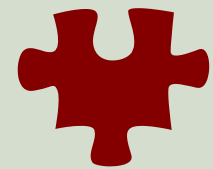
- Gaps in the internal marketing
- Cross-border marketing cooperation is only at the beginning
- Marketing is operated mainly in the **domestic market**
- **No brand products** to promote the WH Wadden Sea
- **Lack of quality of service and quality of offer:** tackle this challenge by qualification projects – have to be continued
- **No common environmental label system / public private partnership models** for natural World Heritage partners
- **Training courses** on sustainable tourism and World Heritage Site must be further developed and expanded





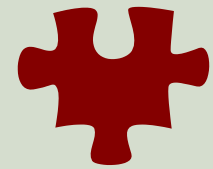
- Common **visitor management system**, including common corporate design and content is missing
- **Visitor centers** need to be taken up to date regarding the information and interactive services about the Wadden Sea
- **Sustainable transport links** must be strengthened in all regions
- **Different bases for tourism statistics** in all three countries >> no comparability
- **Market analysis focus on different markets** with different source trends and customer behavior >> no comparability





- **No regular standardized questionnaire** that covers the entire Wadden Sea
- **And lack of specific knowledge about foreign markets** in terms of nature tourism, motivation and behavior of target groups & market potential (DK, D, Dutch)
- **Lack of specific knowledge to other international markets**, which also show potential to visit the Wadden Sea
- **World Heritage theme is not yet integrated into all education programs and visitor centers** >> exhibitions, interactive games & school programs must be developed in different languages



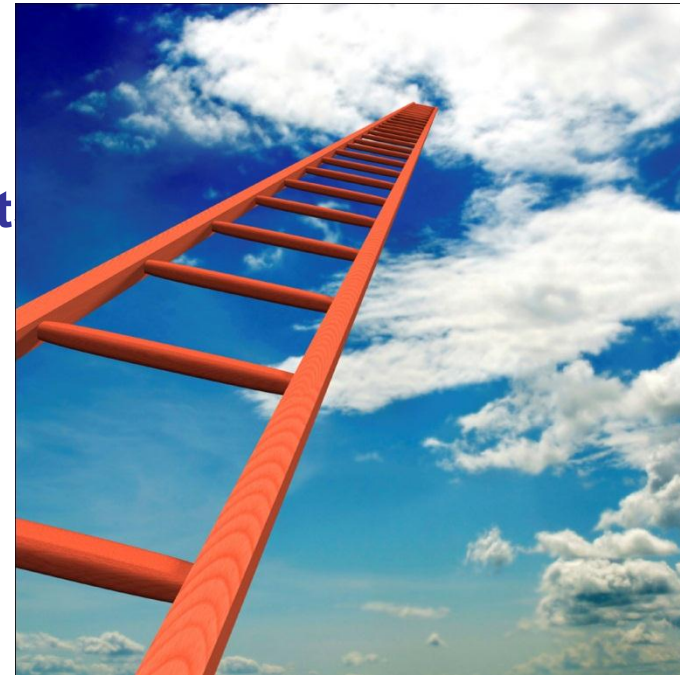


- **World Heritage issues** must be more integrated into the **IWSS** (International Wadden Sea School) and available to all information centers.
- There is **no common educational material** regarding the World Heritage-theme that could be used in all schools to learn about the whole Wadden Sea area.
- **The Wadden Sea is not yet integrated into the curriculum**, field trips to the World Heritage Site should be part of the lesson.



Strategic guidelines for the tourism strategy

- **Develop** a set of **core principles** for the tourism activities in the entire Wadden Sea region
- **Use** of World Heritage status as a **"brand"** for companies, public bodies and communities
- Raising the **profile** and **identity** of the Wadden Sea through awareness campaigns on external markets
- **Raising awareness** in the region of the importance of World Heritage



Strategic guidelines for the tourism strategy

- **Implementation** of the Wadden Sea issue **in local schools and in all visitor-/information centers**
- **Adherence to the highest standards** in tourism management
- **Strengthening of transnational co-operation** and use of the WH status for the development of a coordinated approach to promote tourism in the entire Wadden Sea region
- **Take an active role** within the international World Heritage structures

