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Overall evaluation of the stakeholder survey for the Dutch 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

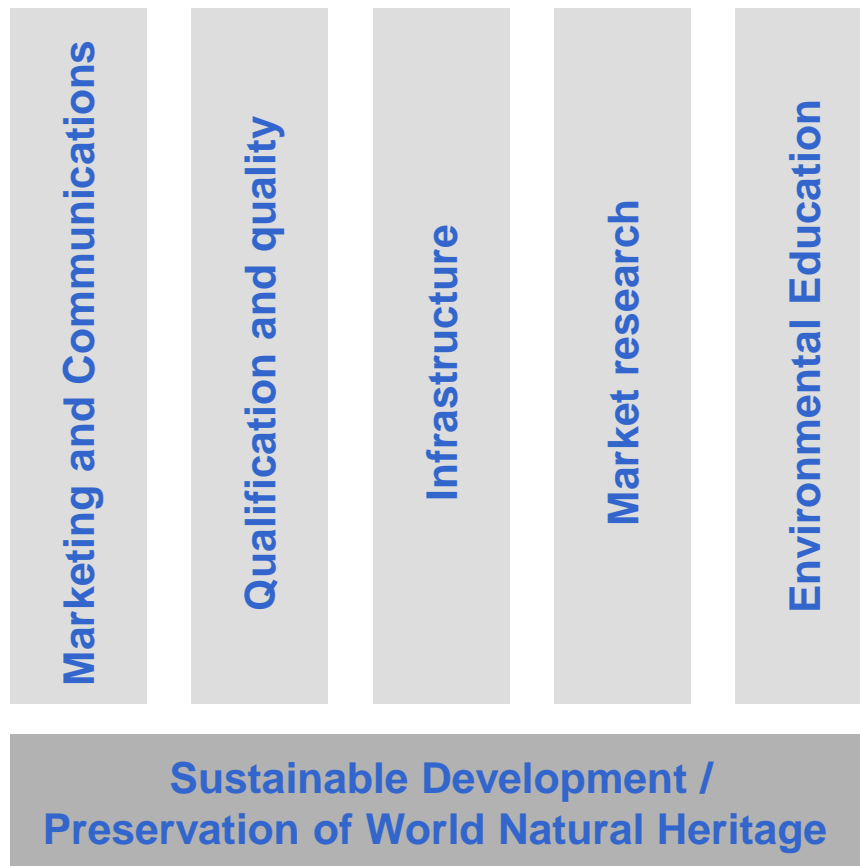


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10 YEARS 2001-2011



5 main fields of action



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Total started surveys : **33**

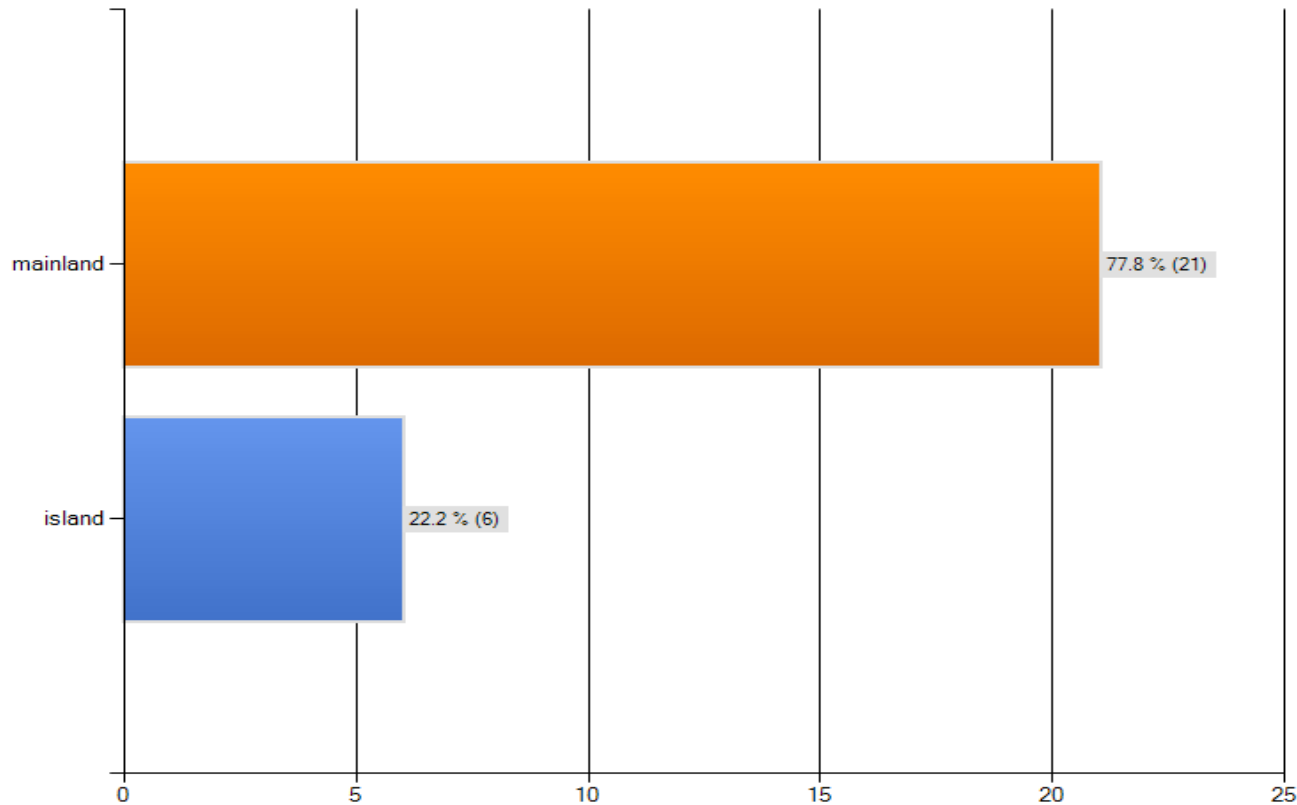
Completed surveys: **27 (81,8%)**

Survey period:

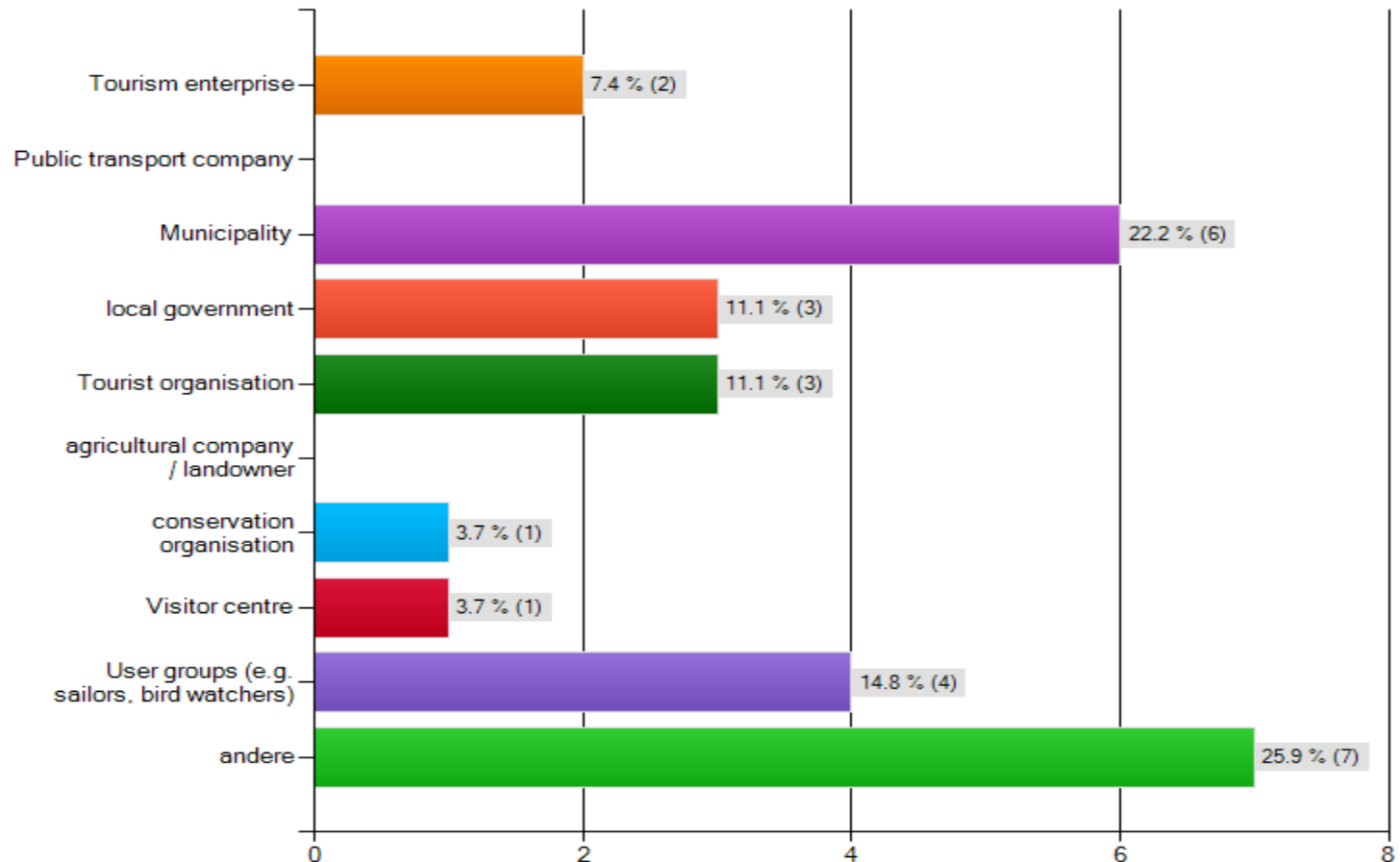
End of January – end of February 2012



Where do the participants come from?



Which stakeholders are participating?

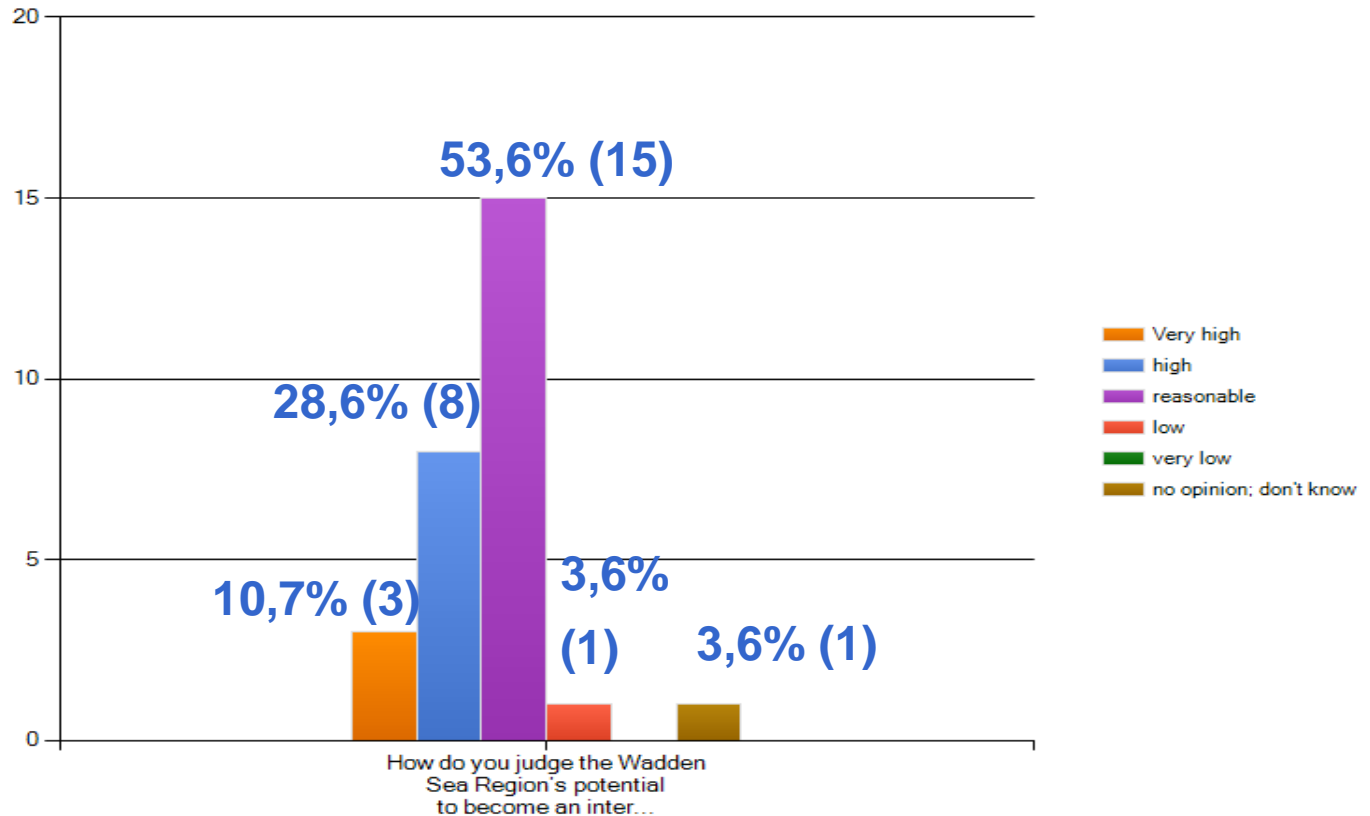


What are the possibilities of tourism development due to the World Heritage status?

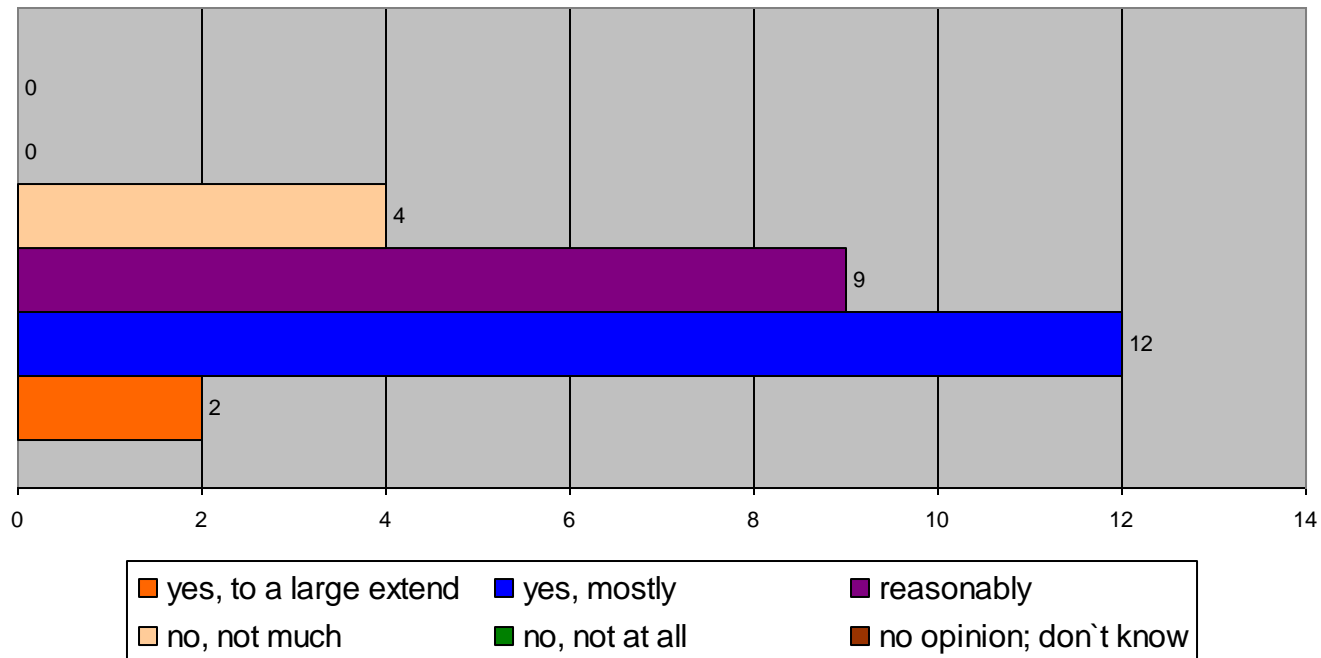
- Mentioning the WHS designation is helpful to raise the profile of WHS Wadden Sea
- By using the brand new target groups (like the BRIC countries) could be reached



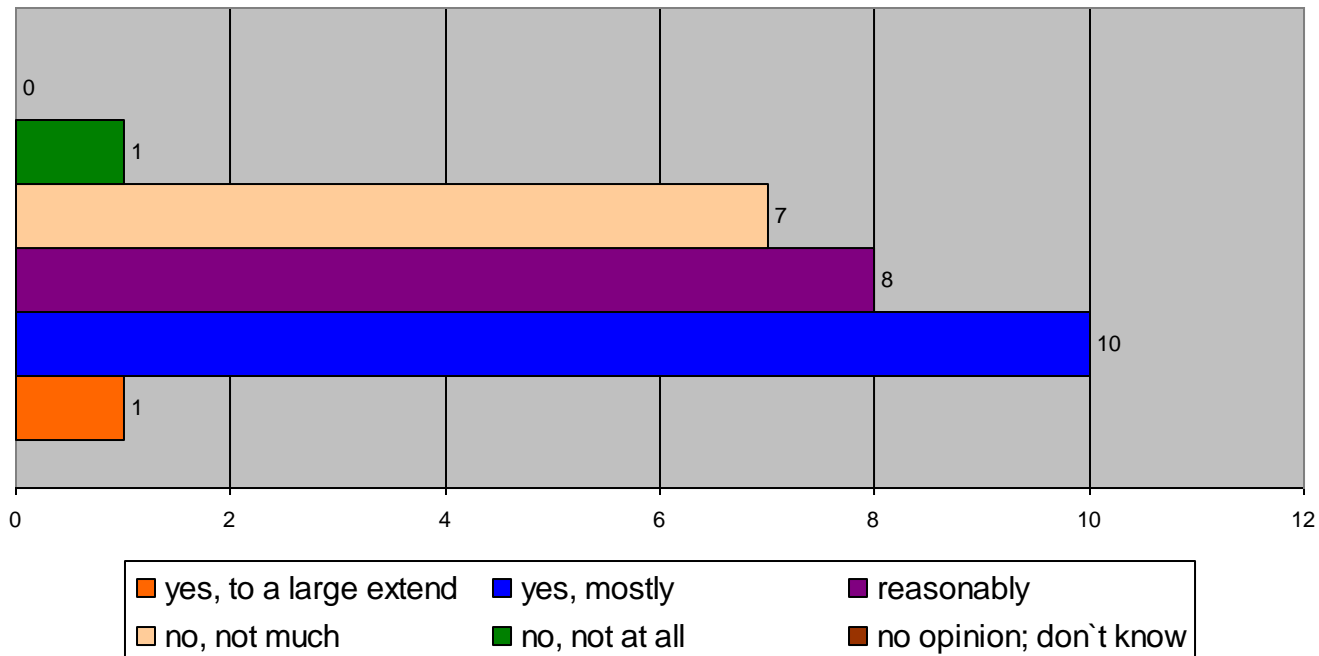
The Wadden Sea Region's potential to become an international tourism destination...



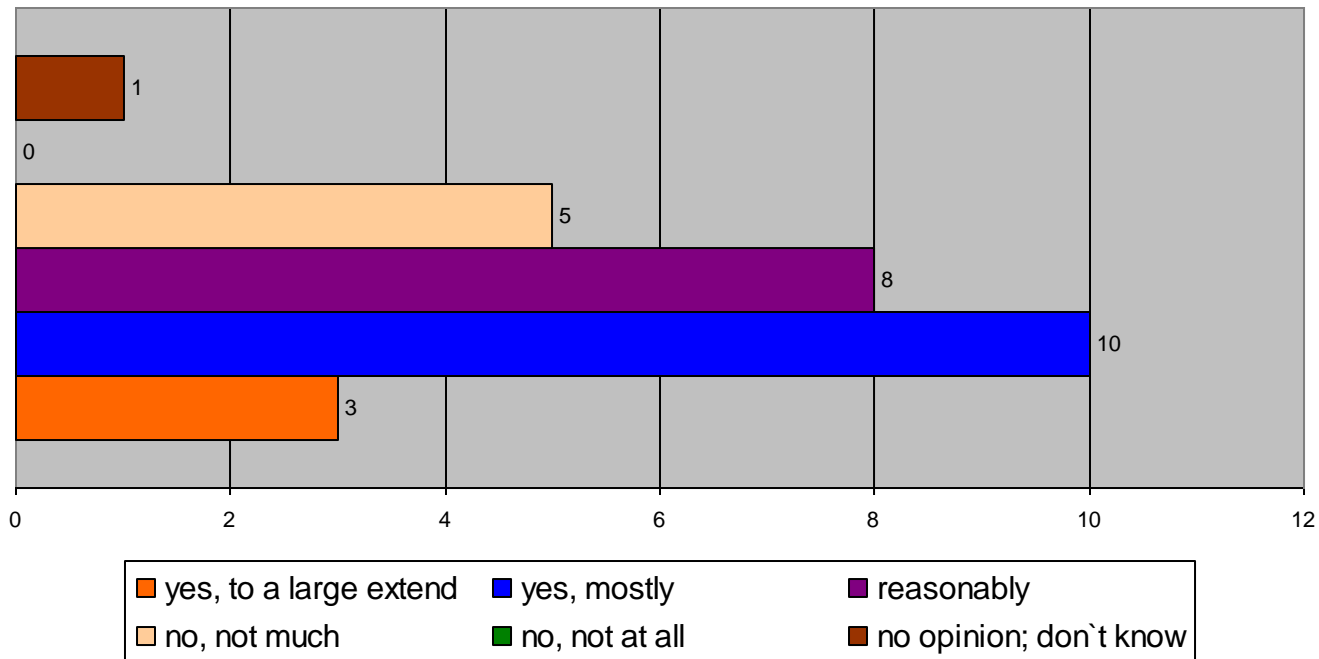
Can the World Heritage status build pride and self-confidence among the local community?



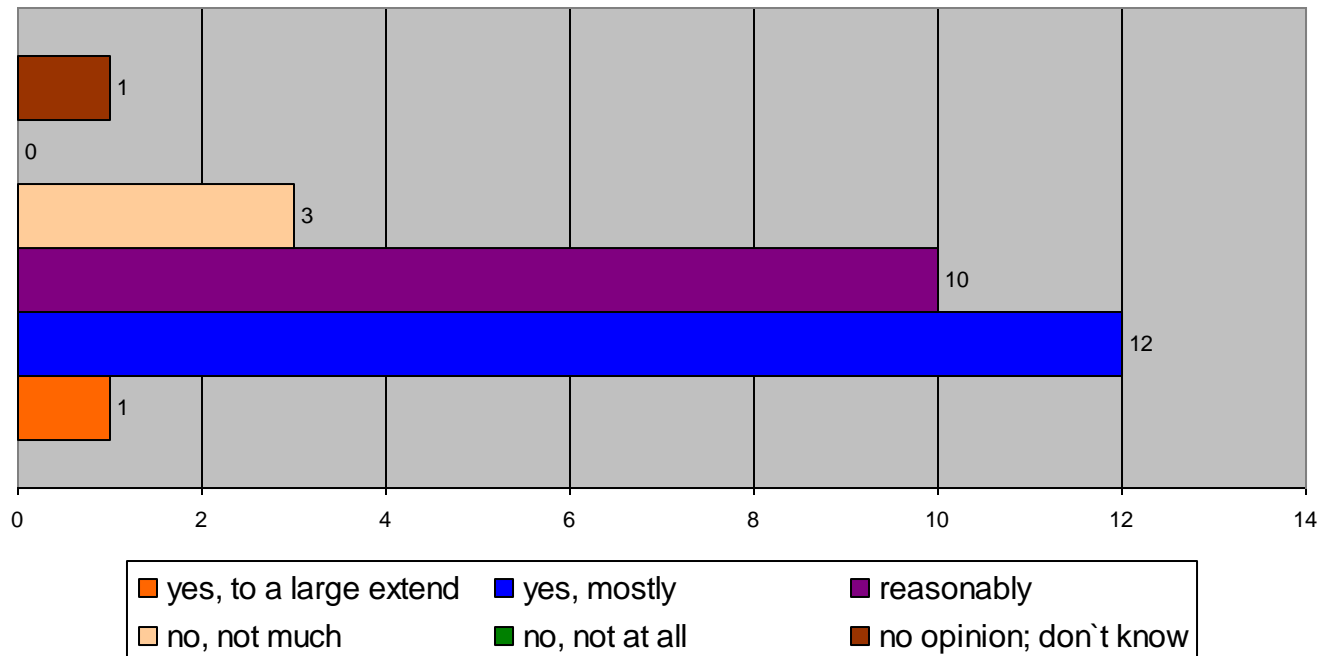
Does it increase the inhabitant's understanding and responsibility for nature conservation?



Can the World Heritage status be an engine to start cooperation among stakeholders regionally?

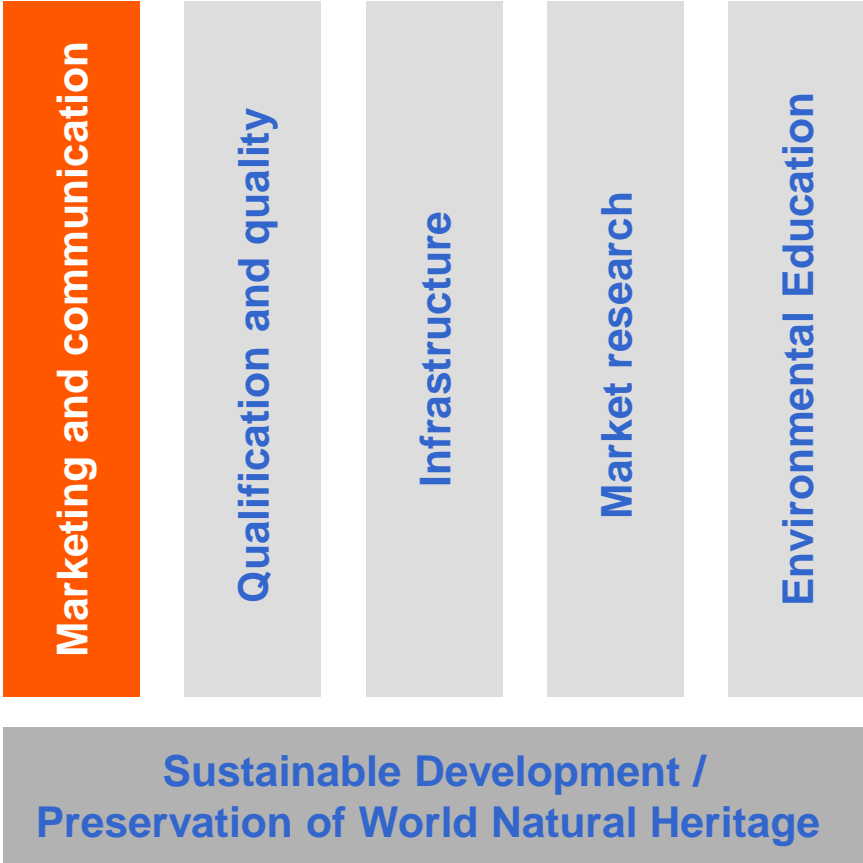


Can the World Heritage status be an engine to start cooperation among stakeholders across the whole World Heritage site / at international level?





Marketing & communication



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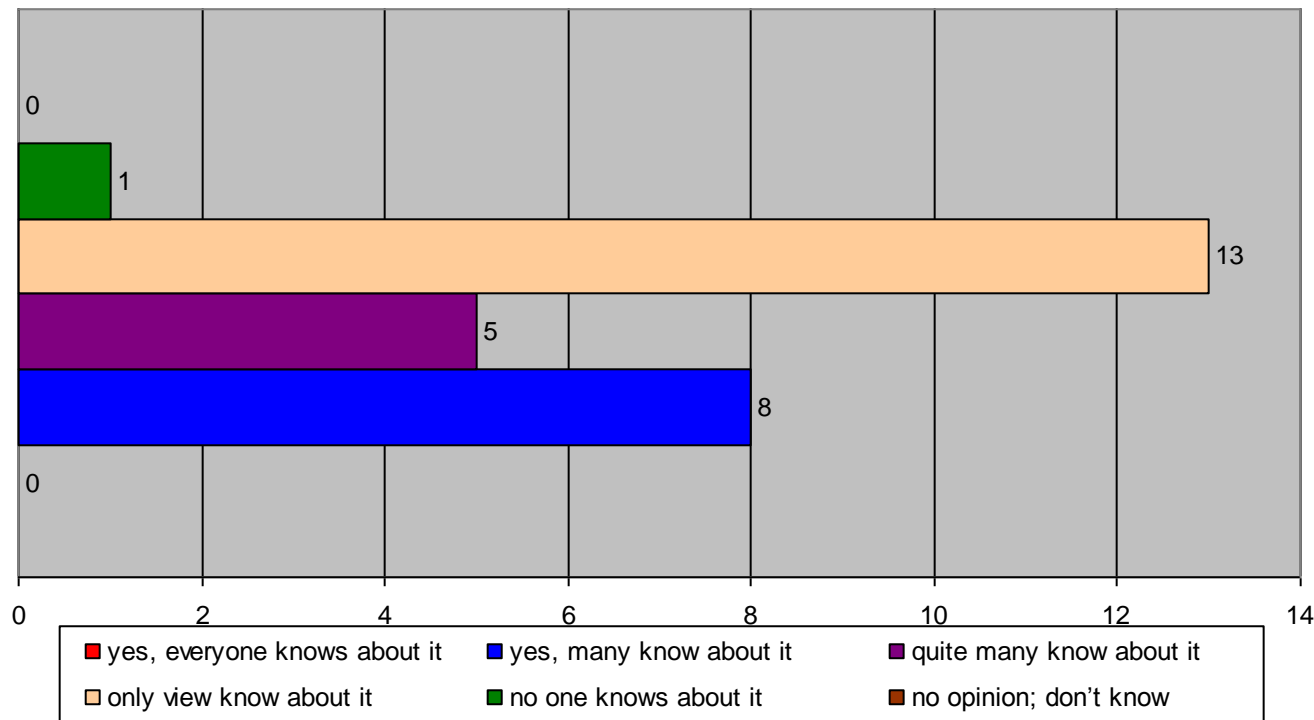
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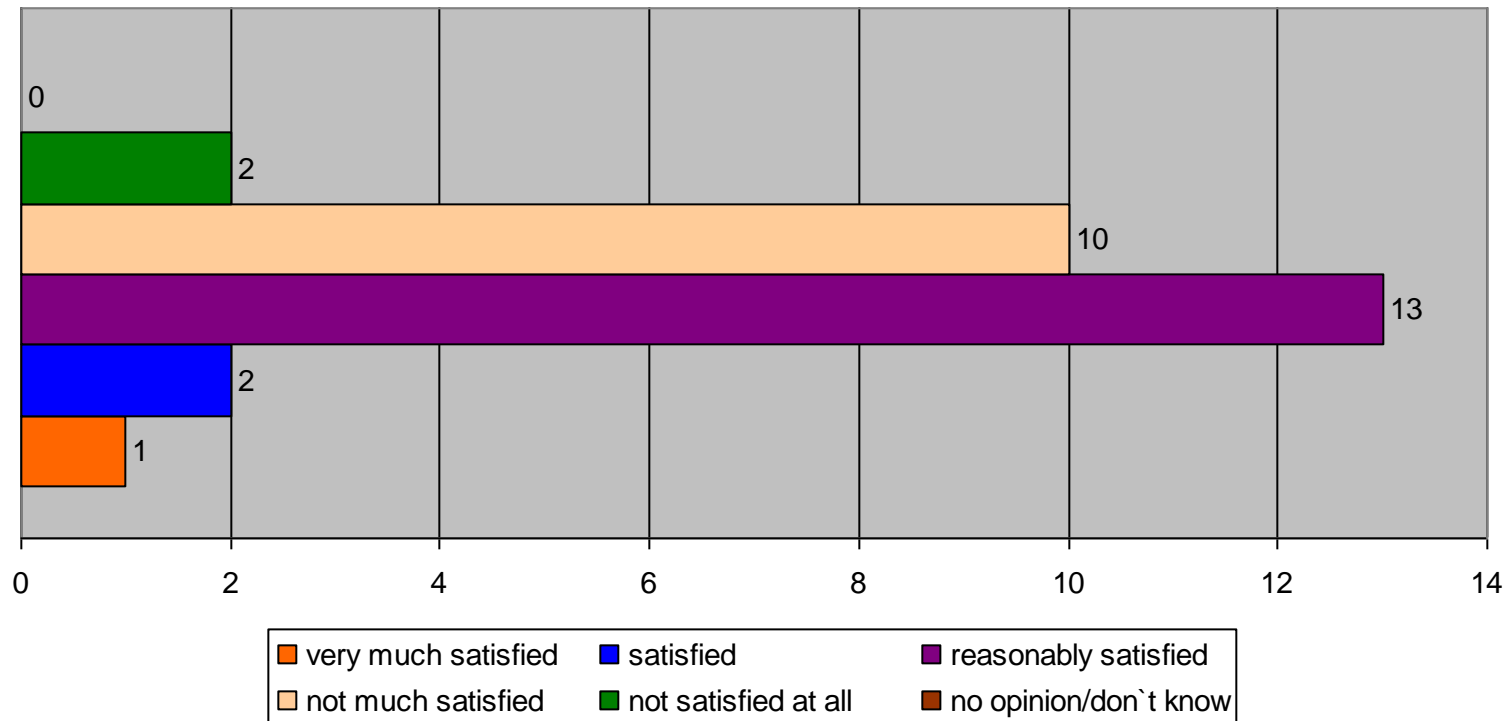
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Is the World Heritage Status of the Wadden Sea Region well-known among tourism stakeholders in your area?

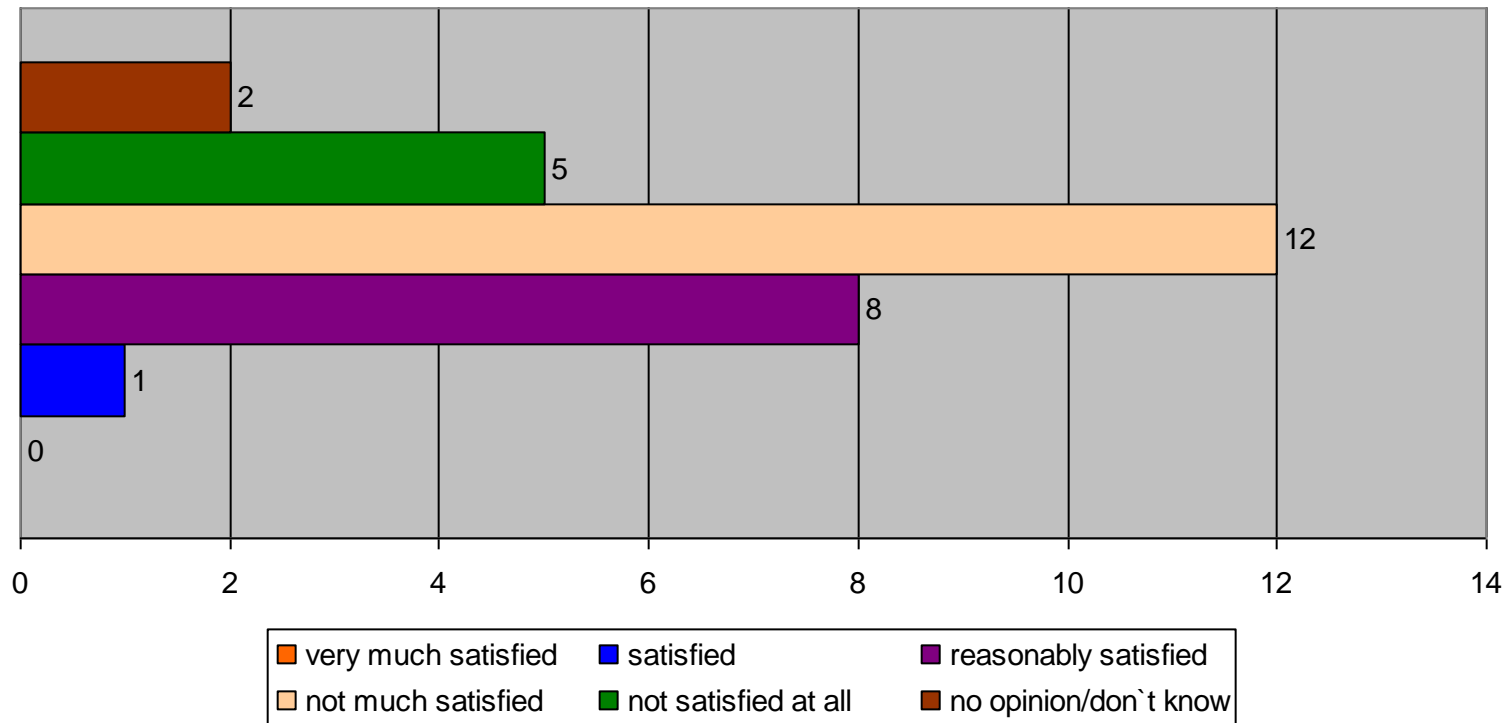


Satisfaction with the marketing and communication of the Wadden Sea in your area as holiday destination for experiencing nature...

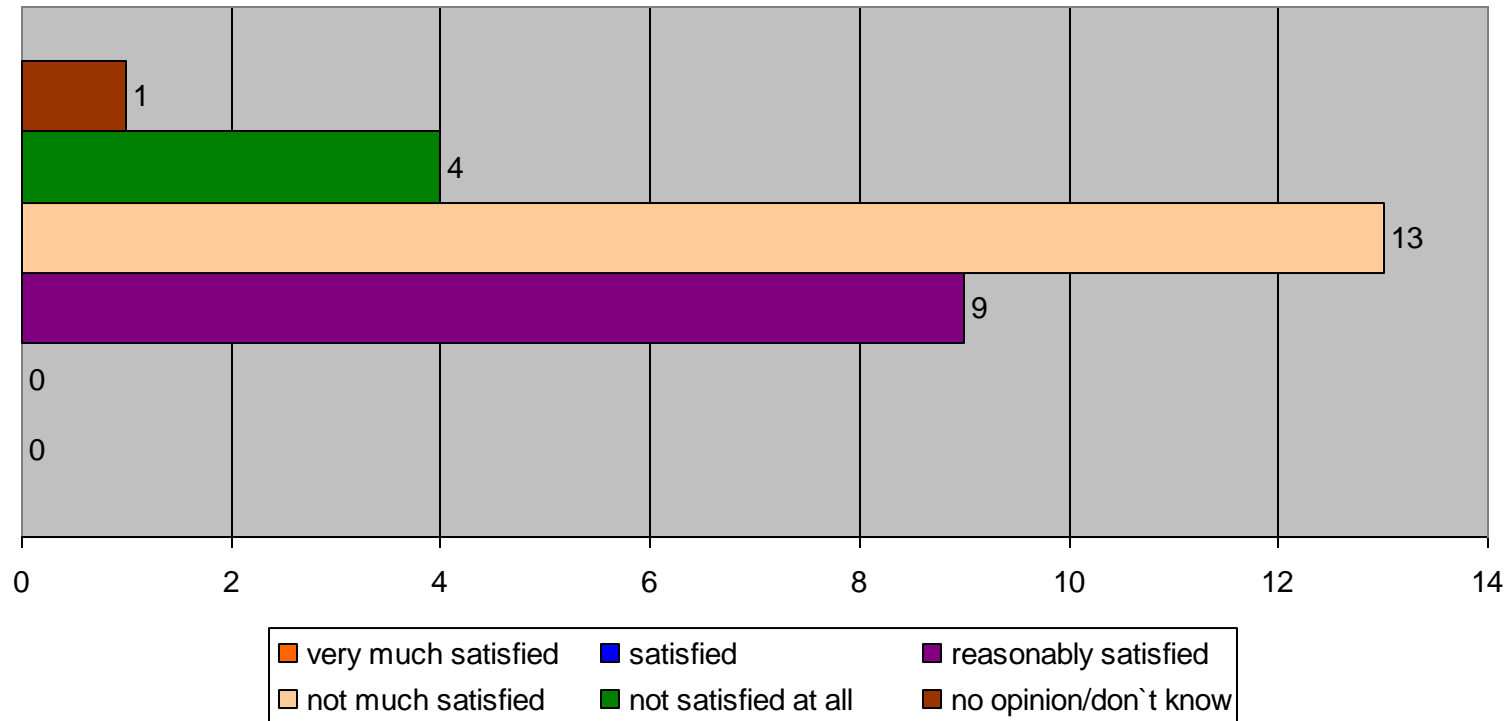


Survey: marketing & communication

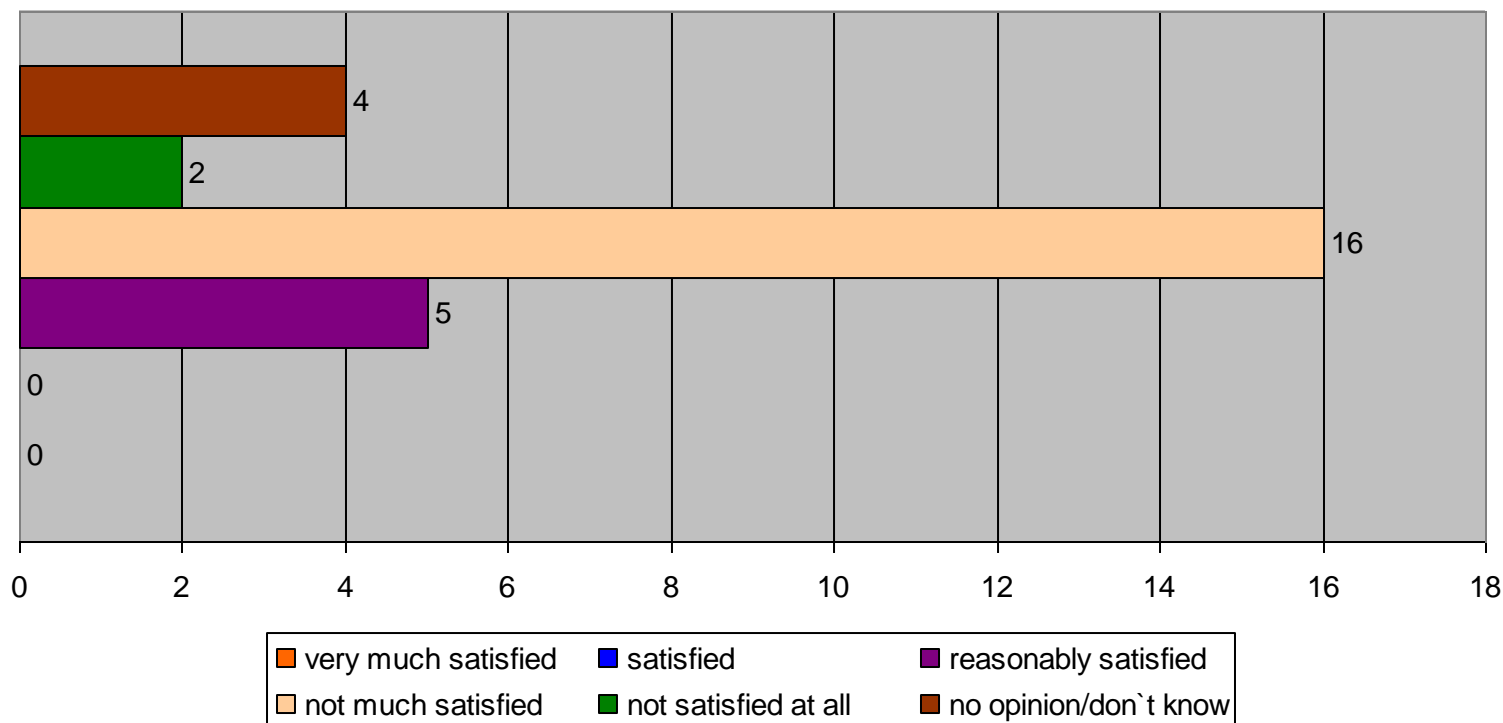
Satisfaction with the joint marketing of the Wadden Sea as an international tourism destination...



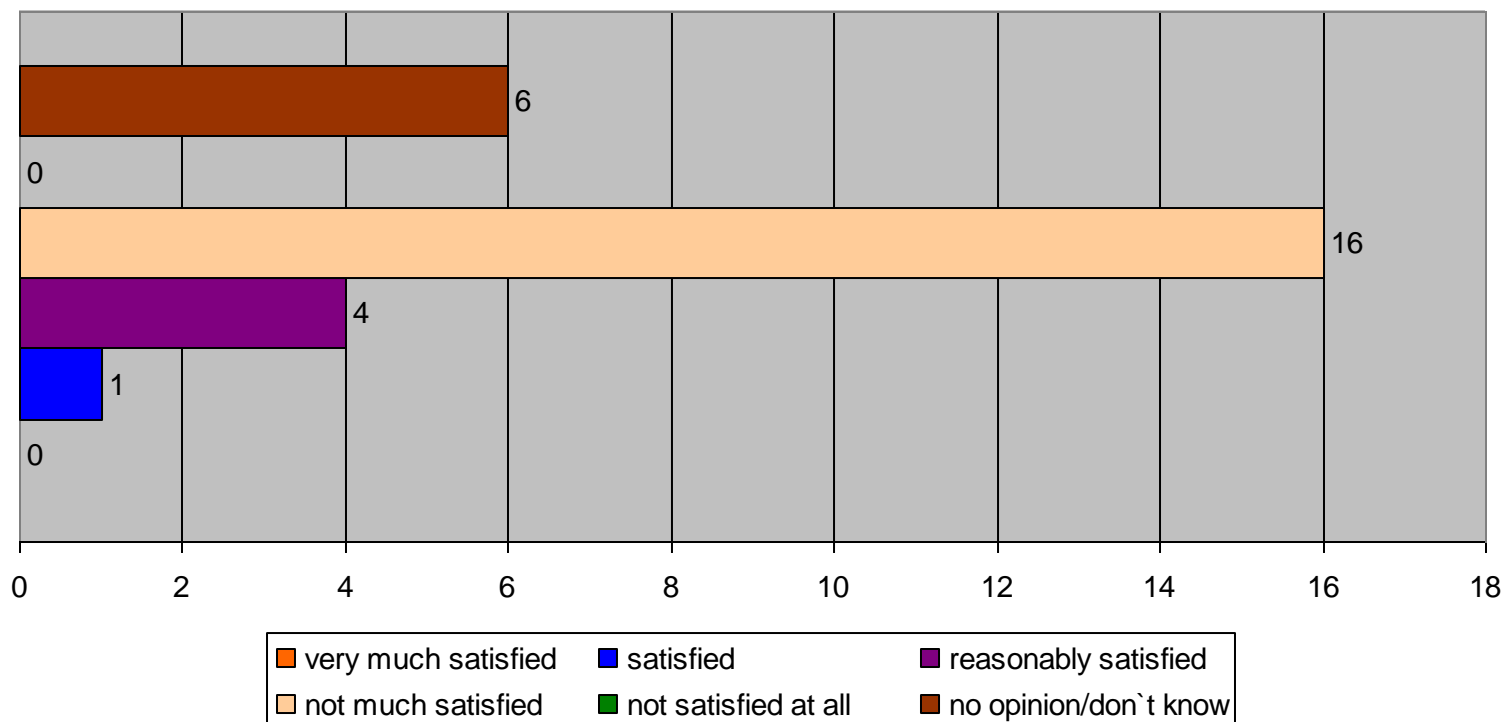
Satisfaction with the marketing of the region as a World Heritage site as supporting USP / added value ...



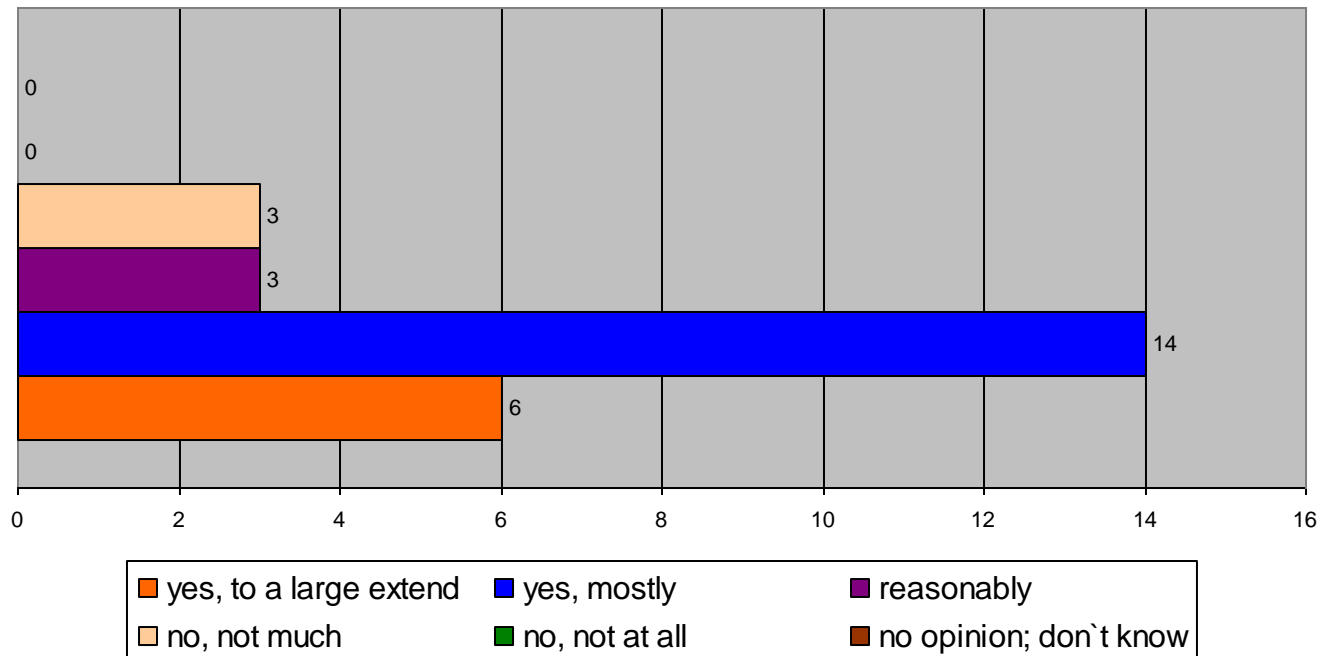
Satisfaction with the information, communication and ongoing activities by the regional tourist boards and tourism marketing organisations related to the World Heritage status within the region ...



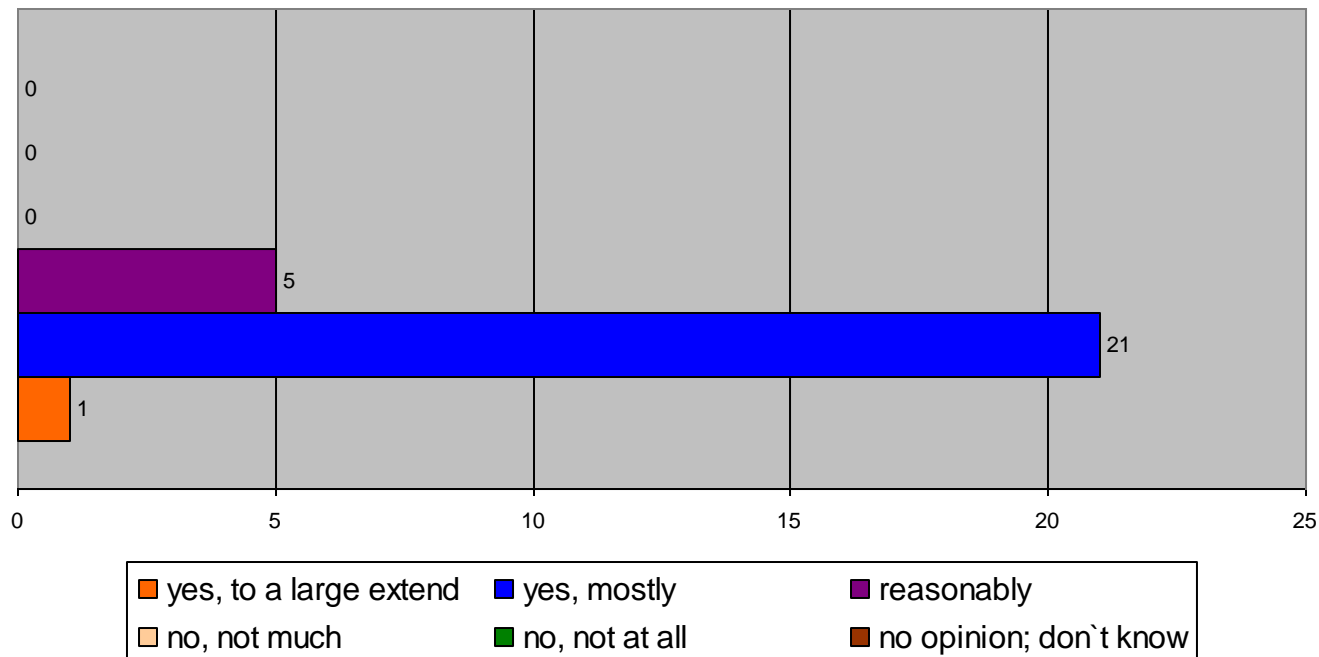
Satisfaction with the information, communication and ongoing activities by protected area administrations related to the World Heritage status within the region ...



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



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



Gaps / missing links concerning marketing and communication of the Wadden Sea ...

- **Cooperation in the tourism industry is not organized very well – small businesses are very much operating on their own**



Views to offer about the marketing of and communication about the Wadden Sea ...

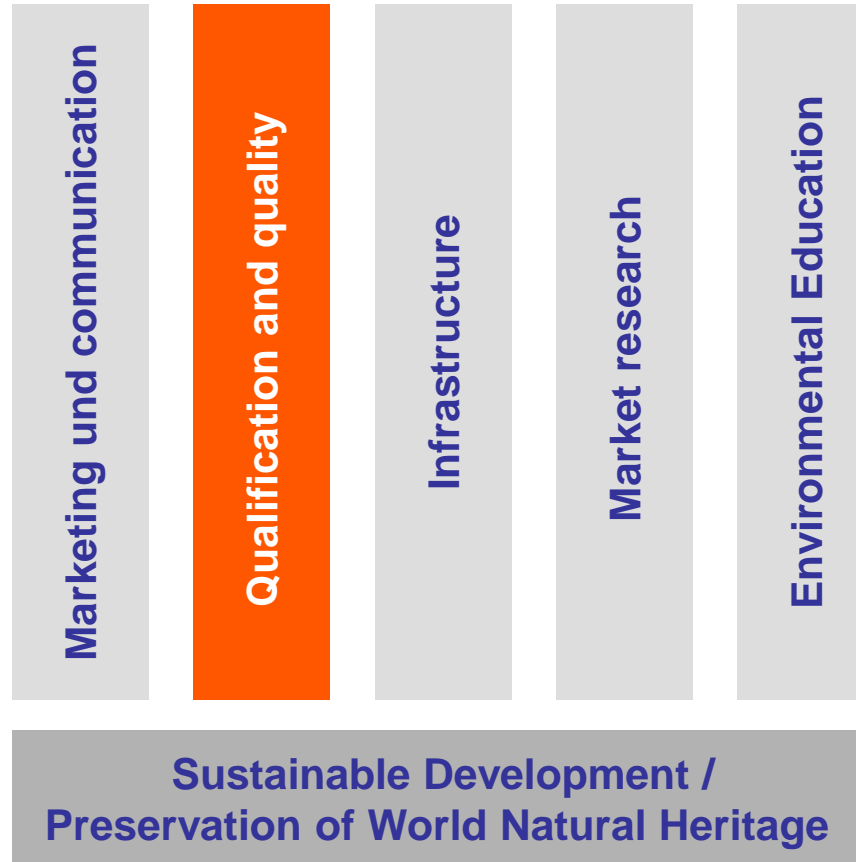
- Only the Sea side is designated as WHS, but for the public however the Waddensea, **the islands and the mainland shoreline is one destination** – it should be dealt within an integral way
- To **promote the entire WHS Waddensea instead of just bits of it** - the success of a destination on another island should not be seen as competition but complementary
- To take the **German part of WHS** and activities there as an **example** to orientate on and to learn from



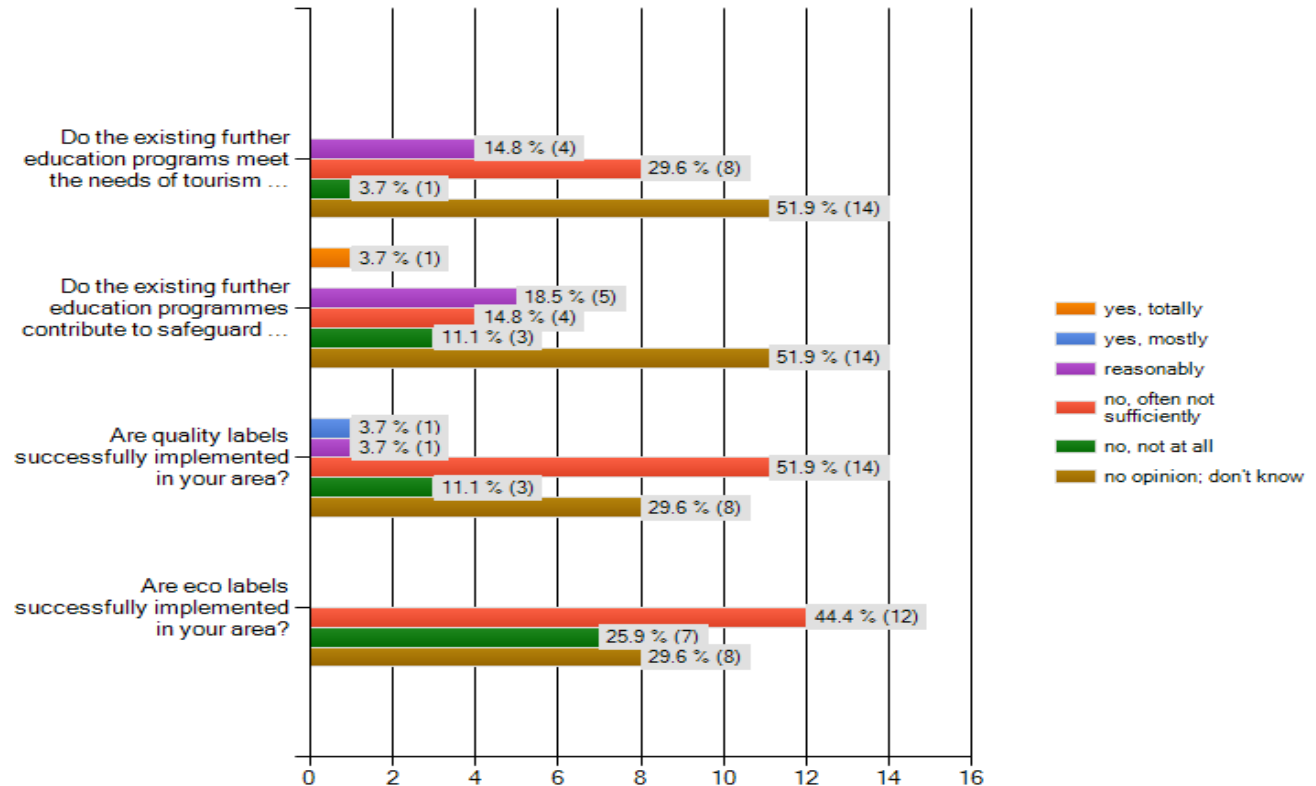
Views to offer about the marketing of and communication about the Wadden Sea ...

- Further improvement of information for visitors is desirable, including tourism and visitor centres, digital information and interpretation signs on sites
- More and updated information about tourism offers
- To use the WHS designation to promote on the international market as a special and sustainable destination
- More cooperation between entrepreneurs, transportation stakeholder, between islands and regions etc.

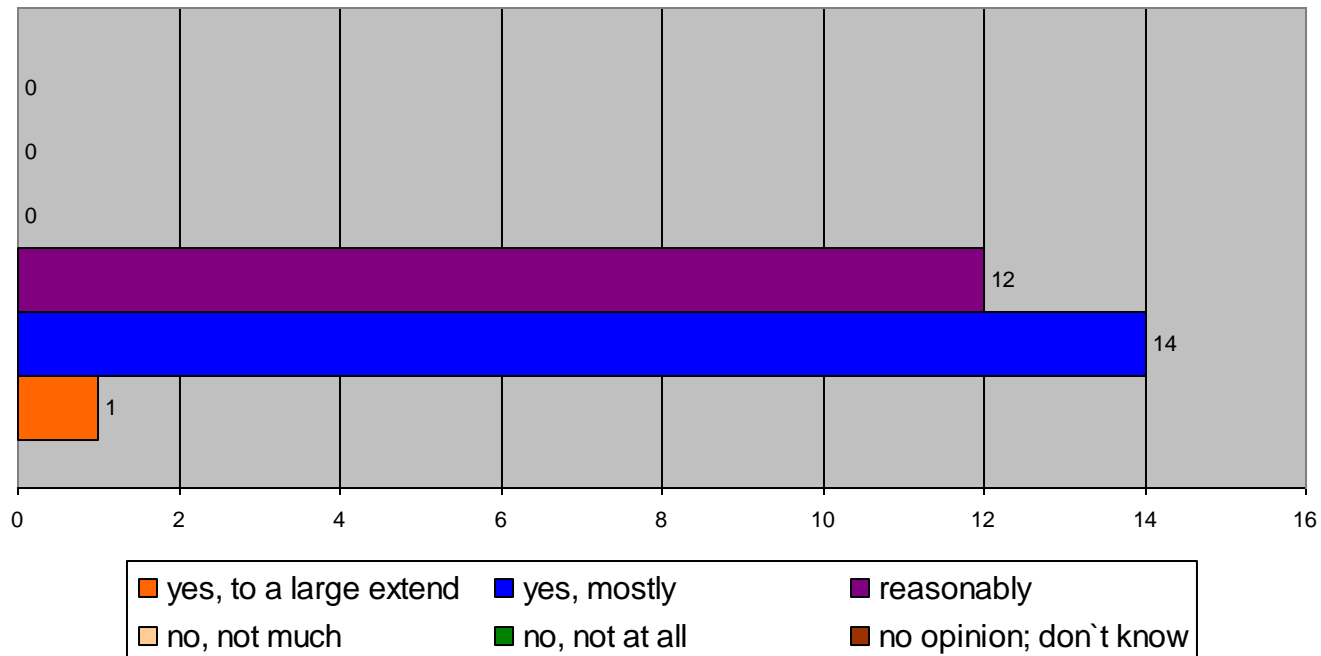




Opinion of current quality standards in tourism, existing quality assurance systems, and training opportunities for staff training of tourist...



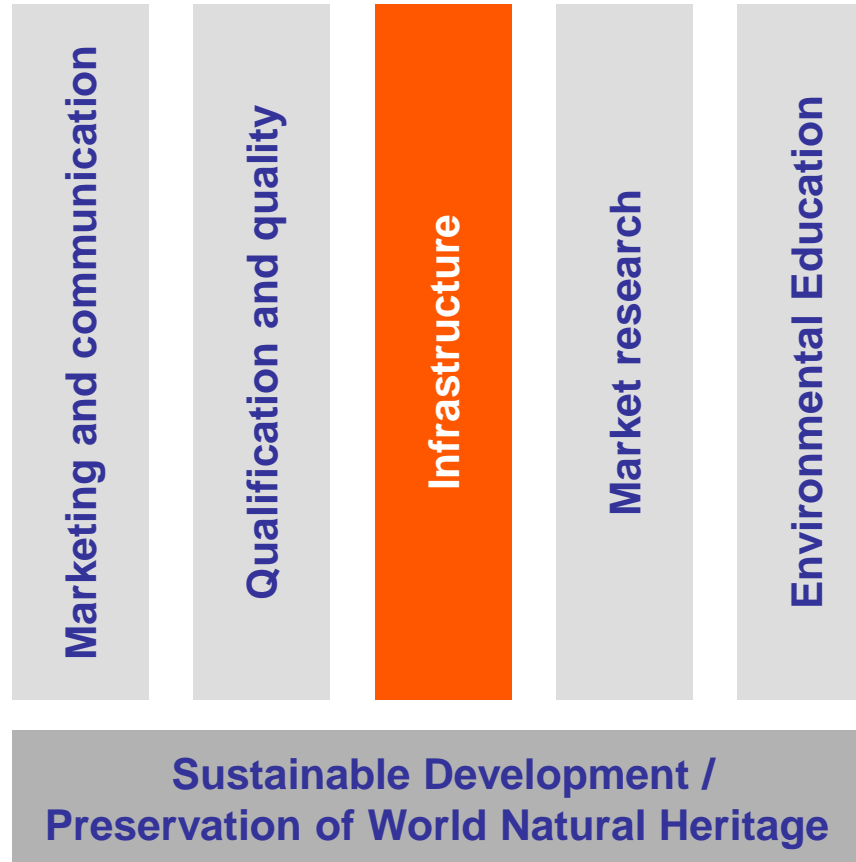
Can the World Heritage help to increase quality standards of the nature experience and of the sustainable tourism infrastructure?



Qualification and quality needs and views to offer about existing qualification programmes, quality control and standards for tourism in national parks, tourism and marketing organizations & tourism stakeholders in the Wadden Sea ...

- **In general a need of more quality and qualitative offers ...**
- **Much debated theme with different views:**
 - 1. using the Green Key, Blue Flag or Waddengold certification for local produce**
 - 2. too bureaucratic**
- **In general these labels are not well-known enough**

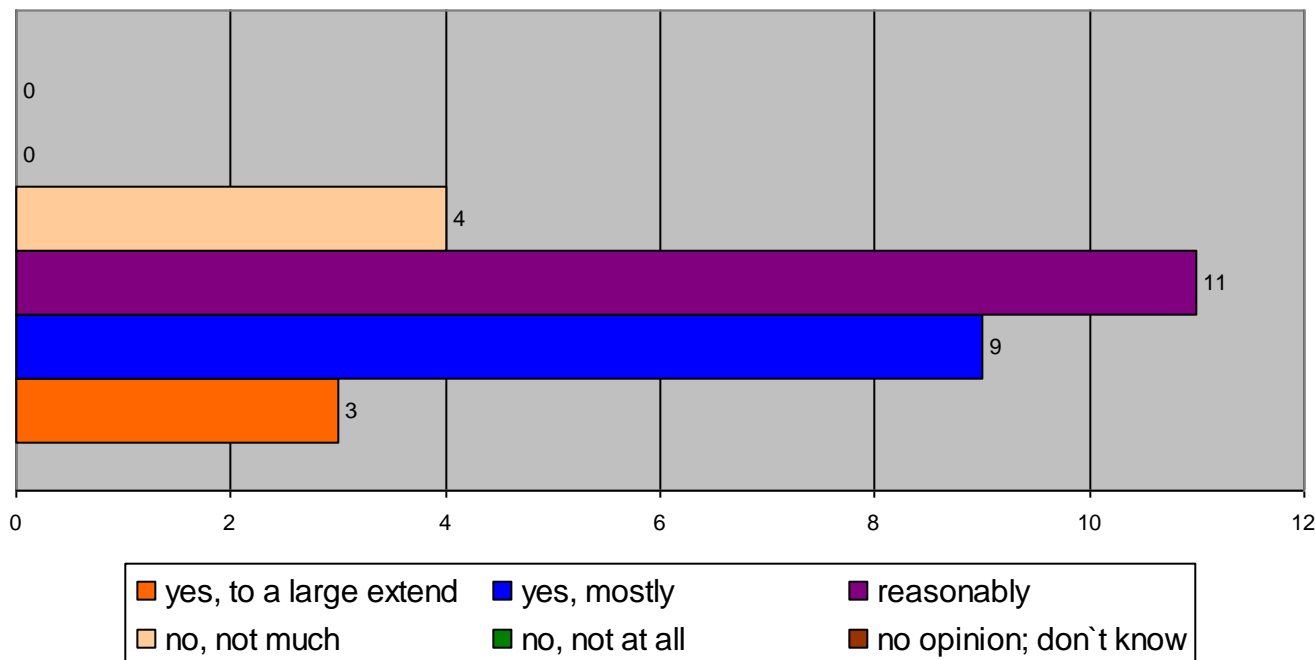




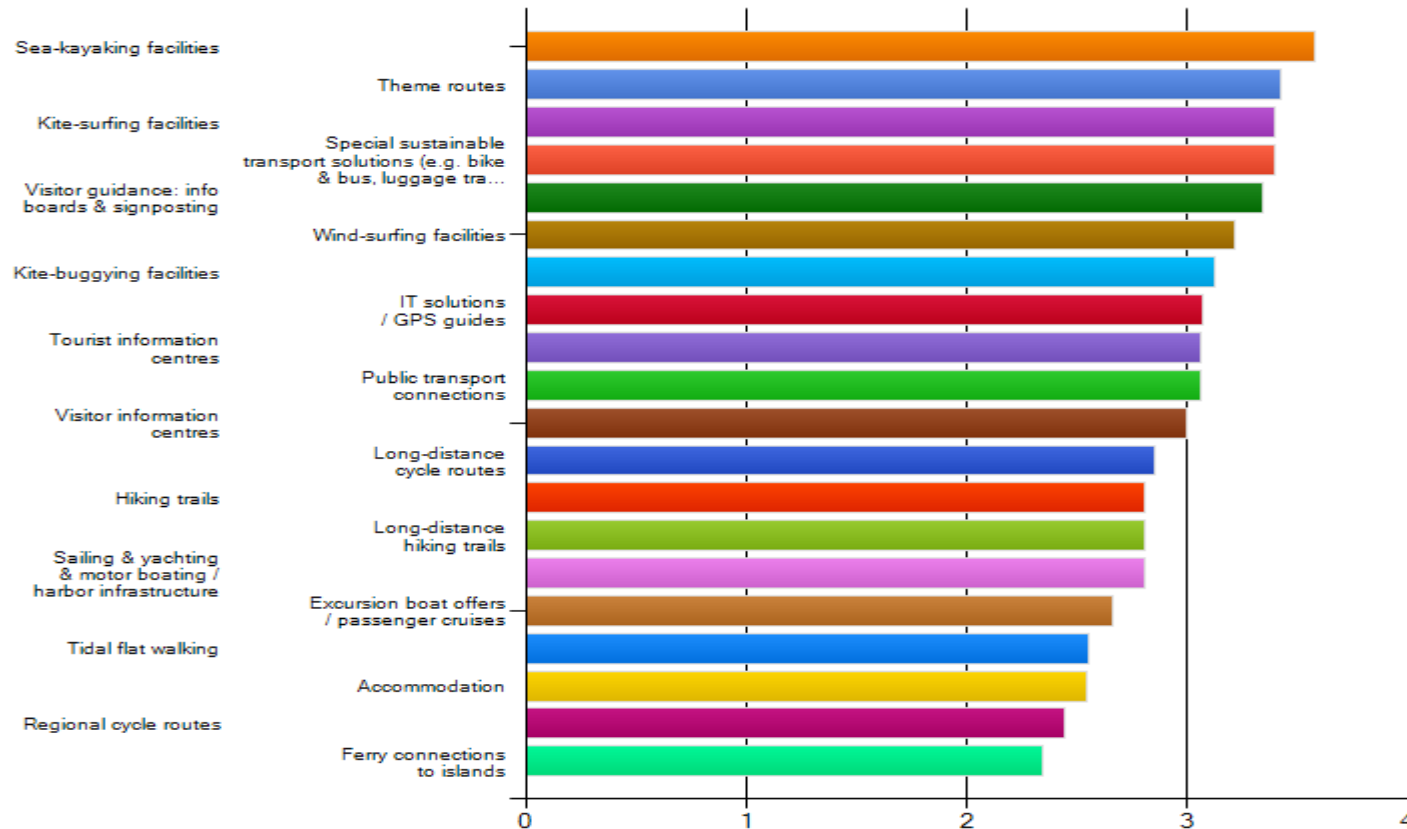
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Can the World Heritage status be a tool to generate investments in sustainable tourism infrastructure?



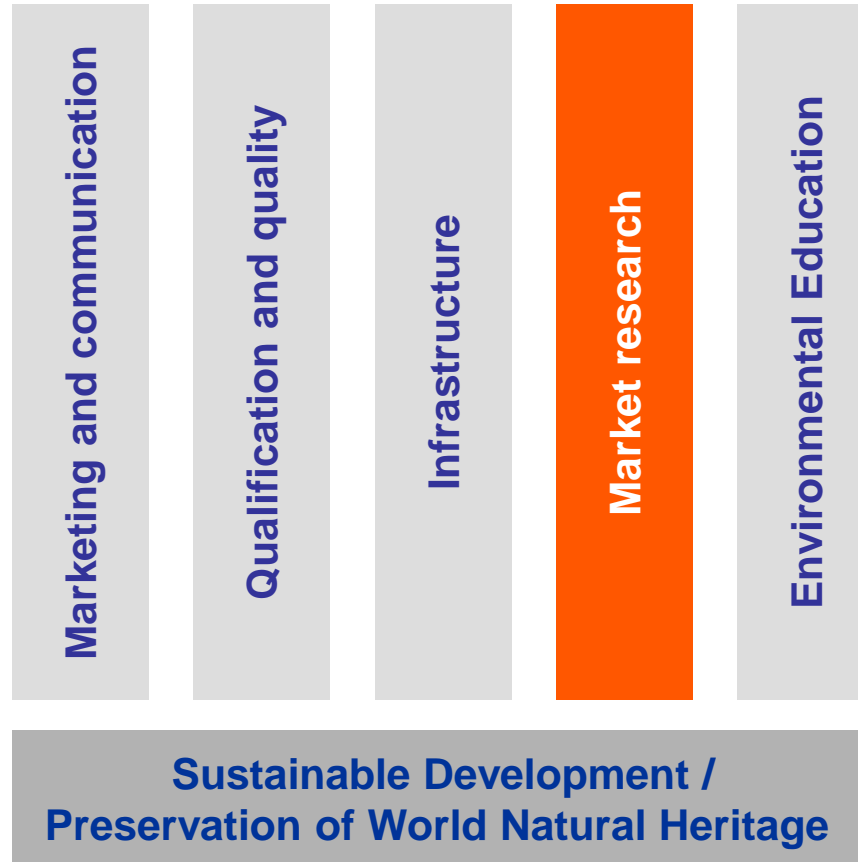
Evaluating the quality of infrastructure services...



Gaps / missing links and views to offer about tourism infrastructure ...

- There is still a **lack of a diverse range of leisure and other activities** such as sea kayaking – possibilities at the moment are limited
- There should be more **use of local products** in order to reduce transport and in to stimulate the local economy

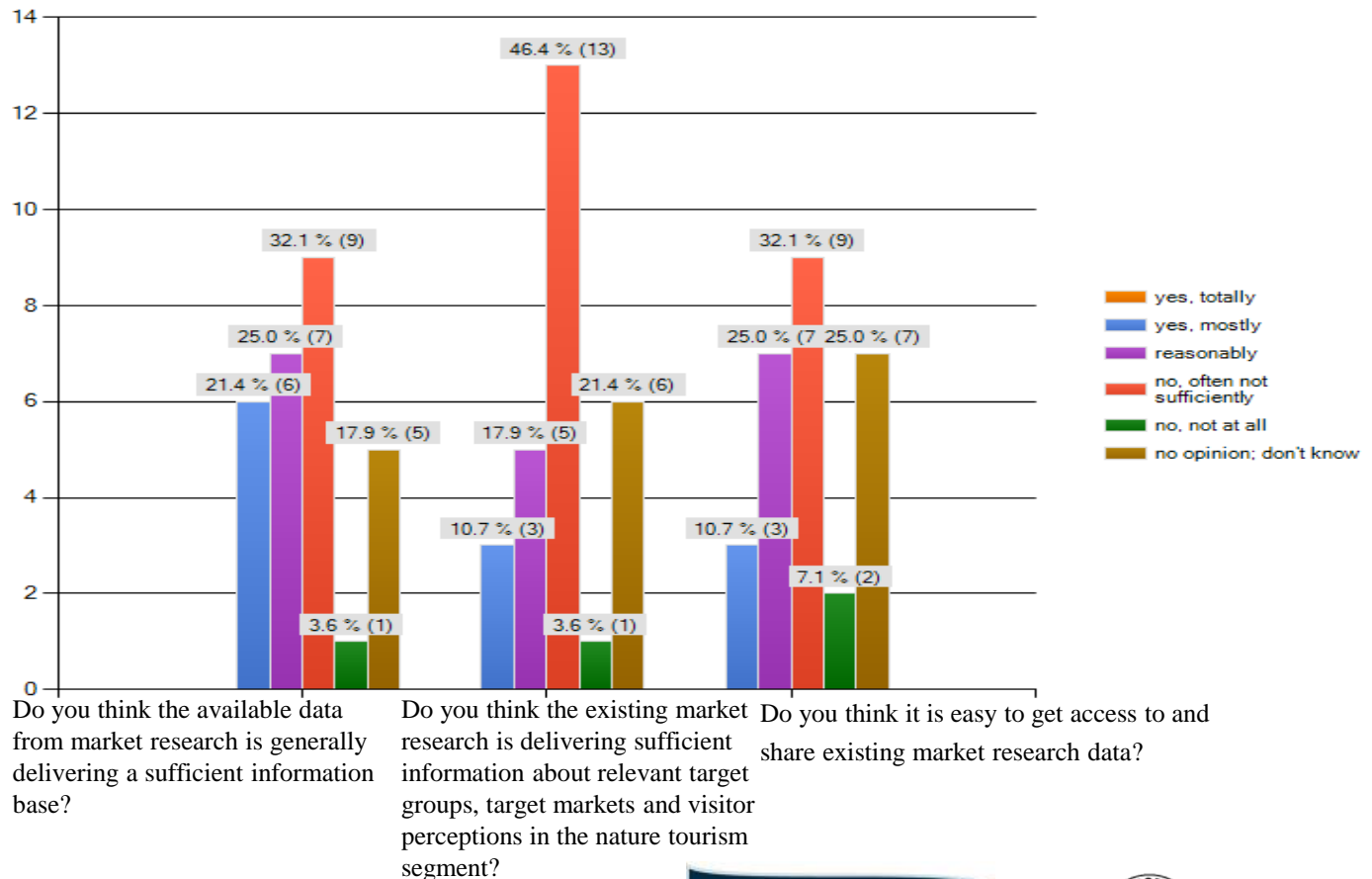




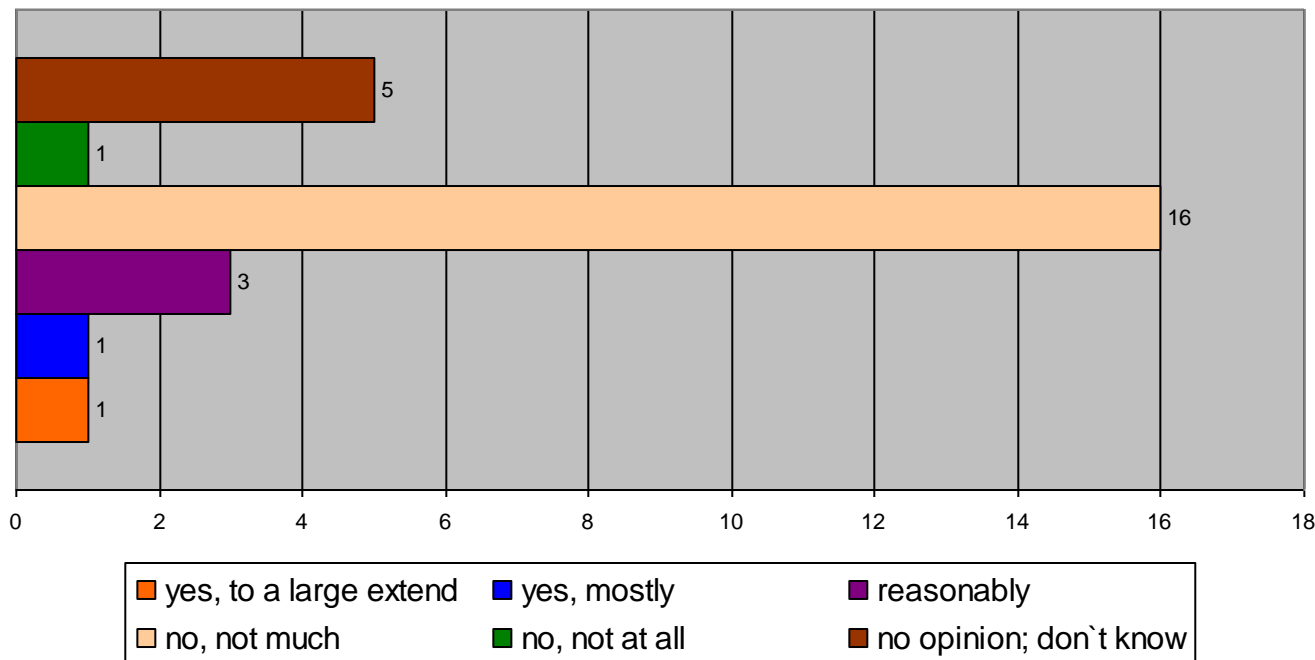
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Views about current market research and tourism data as an information base to improve the tourism offers in the region...



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



Gaps / missing links concerning market research...

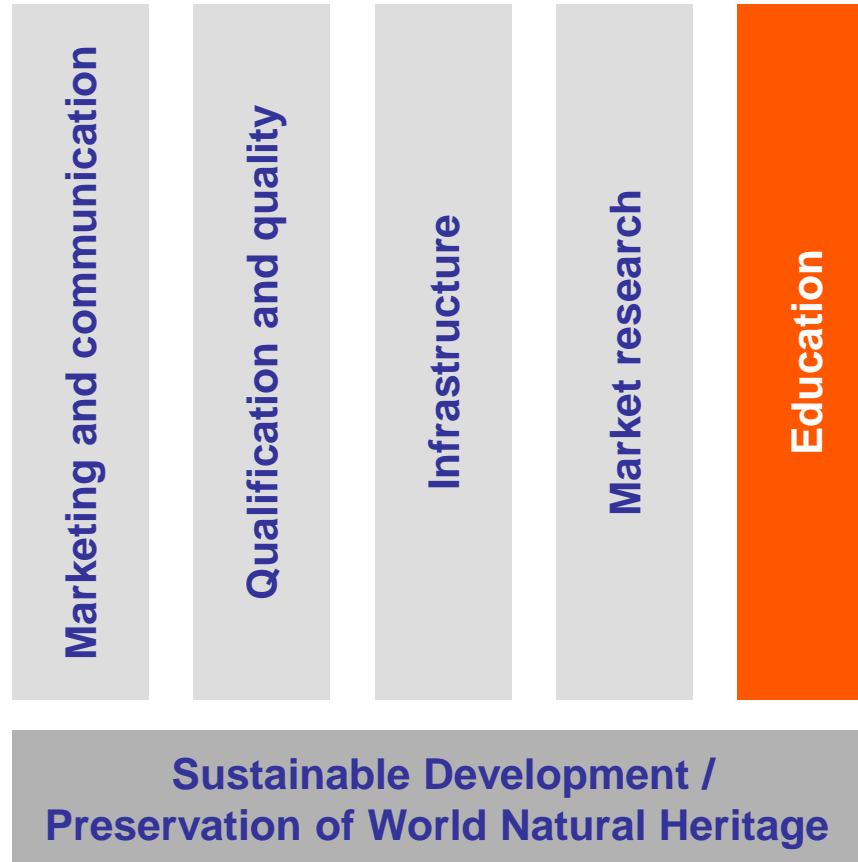
Lack of data on visitor demand - the availability of data is not well organized



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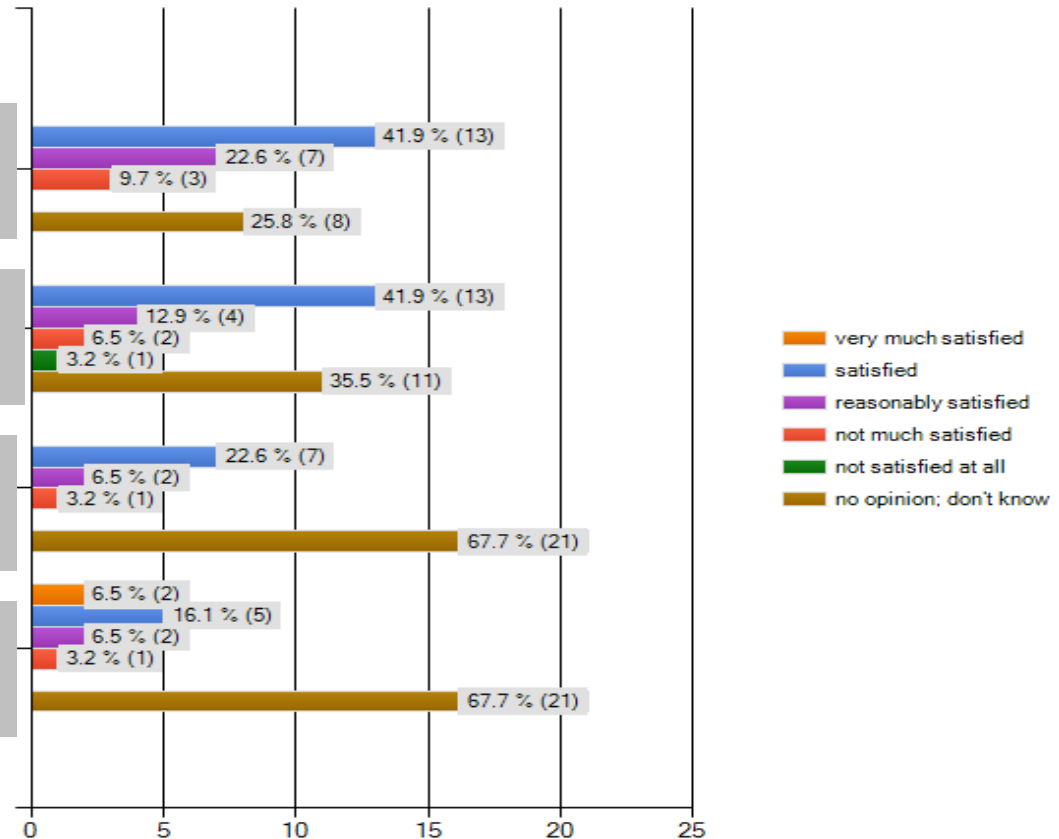
Views about current environmental education and interpretation...

Guest satisfaction:
environmental education

Guest satisfaction:
Quality of guided tours

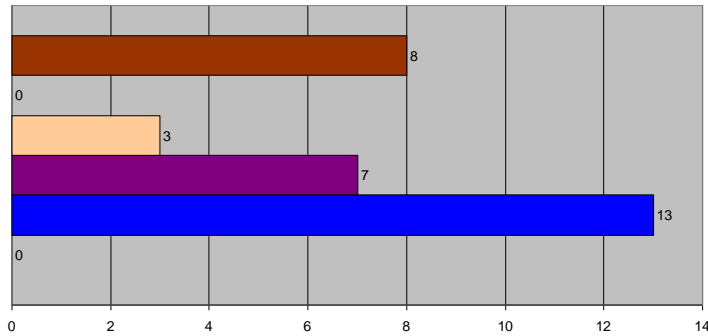
participants satisfaction:
School programmes

participants satisfaction:
environmental education

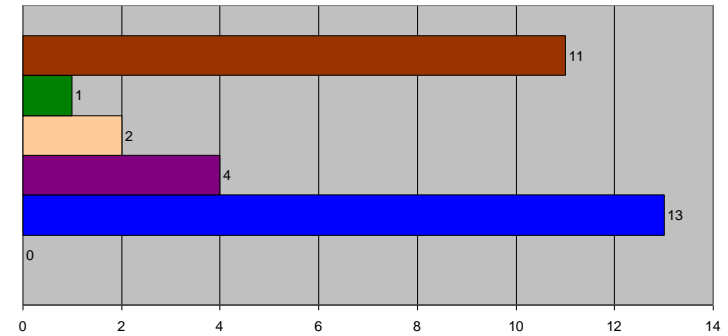


Views about current environmental education and nature experience...

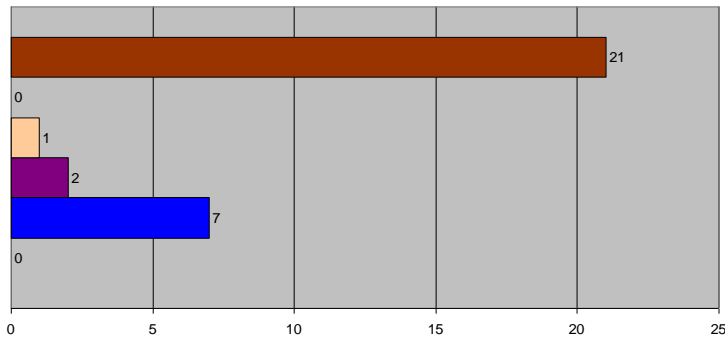
Guests: environmental education and nature experience



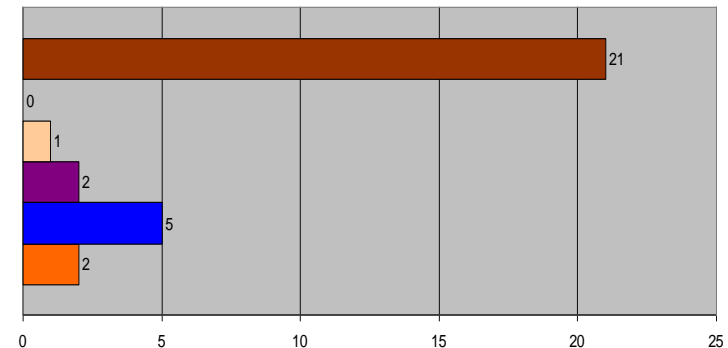
Guests: quality of guided tours



Participants: programmes for school classes

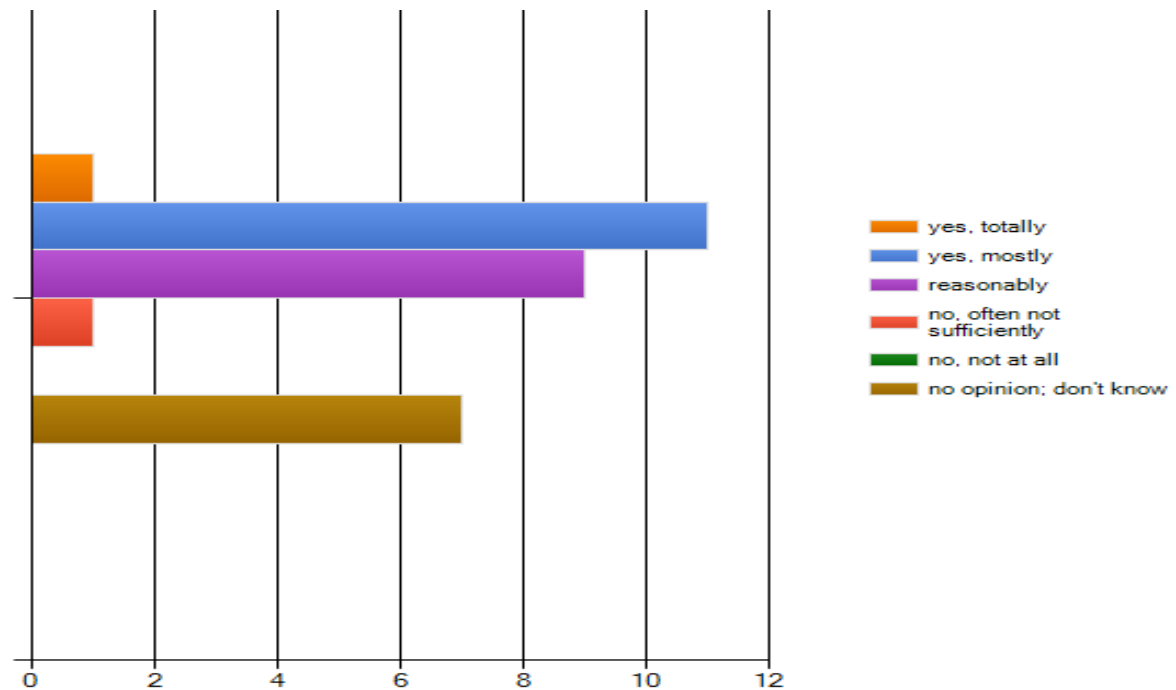


environmental education and nature experience programmes for children

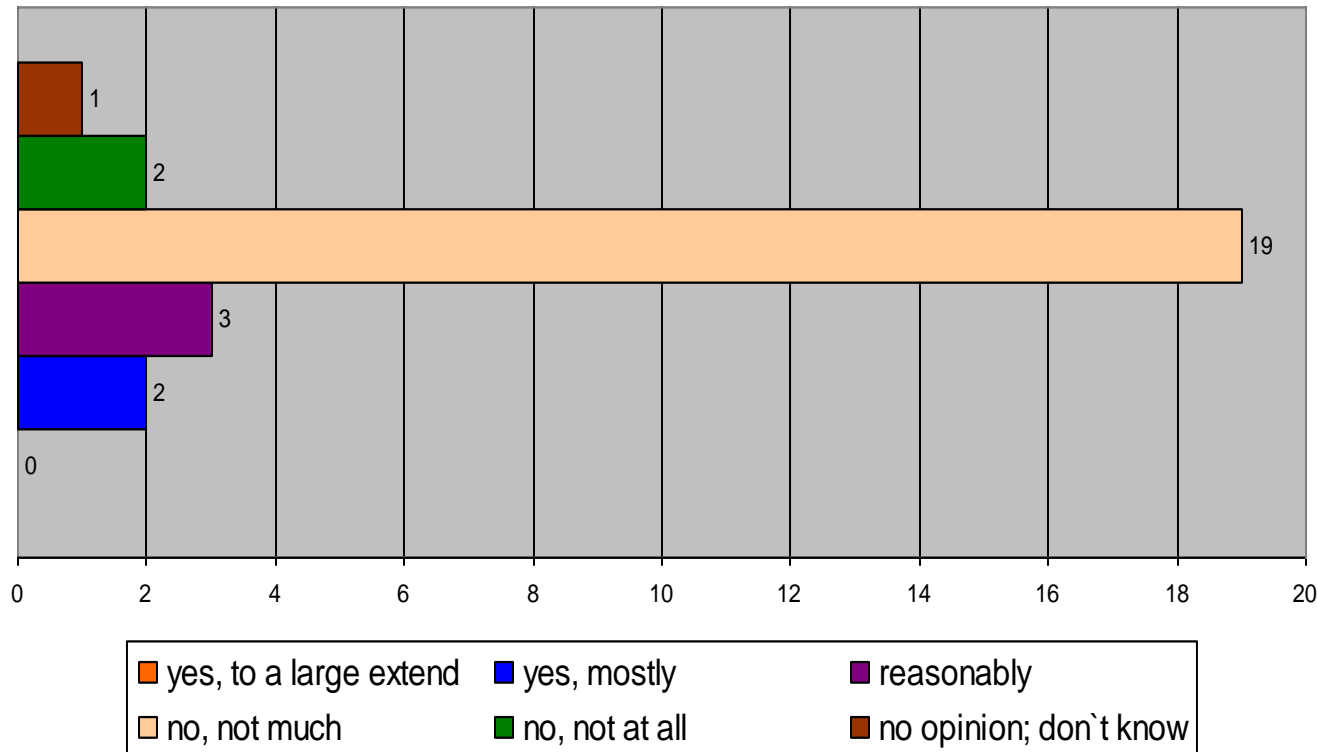


■ very much satisfied
 ■ satisfied
 ■ reasonably satisfied
■ not much satisfied
 ■ not satisfied at all
 ■ no opinion/don't know

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

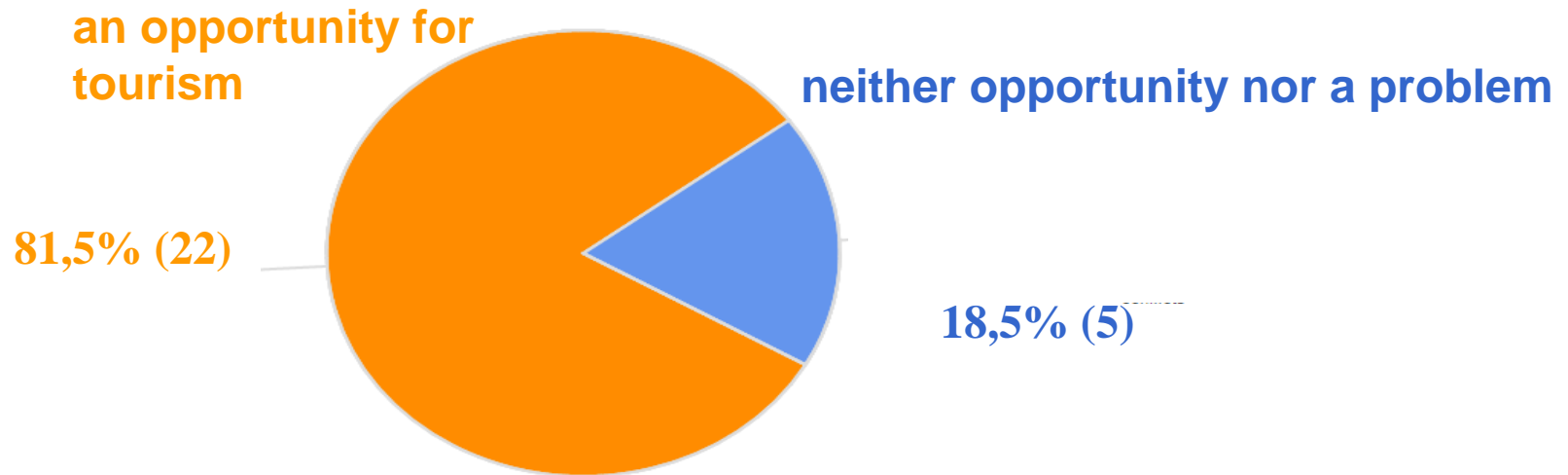


Do the existing visitor information and edutainment offers contain the World Heritage as theme?



Survey: potential conflicts

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

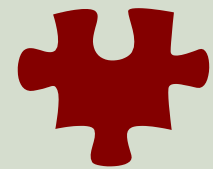


Survey: potential conflicts

Impact of the World Heritage status on the tourism development in the Wadden Sea region: which potential conflicts do you see?

- Conflict: the **balance between opening up places** which are not accessible now (parts of the mudplains, parts of the Waddensea itself where boating is not allowed) **and the need to protect the places**
- Not everybody shares the same view on this, but everybody agrees that **activities like RIB races are not appropriate**

Gaps and action



- **Promotion of whole WHS** and to take Germany as best practice
- Demand for **more cooperation** between all kinds of stakeholder
- **Improvement of visitor information** (tourisms and visitor centres, digital information, interpretations signs on sites etc.)
- **Much more information/market research** on visitor demand and tourism offers
- To find a **balance between conservation/protection and tourism possibilities/offers** – create interesting offers on the less frequented mainland to avoid environmental degradation
- Sustainable use of produce (**local products**)
- **Quality labels /certification** could be useful, but have to be better communicated to the general public



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