



## Baseline Inventory and Analysis

Overview of current sustainable tourism activities in the Wadden Sea World Heritage Site, an analysis of the gaps and synergies with ideas for future directions

Part II of the Baseline Study for the  
Strategy for Sustainable Tourism in the  
Wadden Sea

June 2012  
Prepared by





## Introduction

This Baseline Inventory and Analysis Part II is an essential component in developing the Wadden Sea Sustainable Tourism Strategy and Action Plan 2012 -2017. There is a great deal of published information about the Wadden Sea in both printed and electronic forms, about managing tourism in World Heritage Sites and about the economic benefits of well managed tourism based on natural and cultural values. Much of this material has been made available by the Common Wadden Sea Secretariat, individual members of the Task Group – Sustainable Tourism Strategy (TG-STs) and through EUROPARC Consulting's own research.

## Project Aim

The aim of this project is to develop and implement a Sustainable Tourism Strategy for the Wadden Sea World Heritage Site that will link conservation and tourism in a way that the outstanding universal values of the area will be maintained, experienced and used sustainably. The work will examine and analyse existing tourism and nature conservation data about the Wadden Sea and other World Heritage Sites for challenges and opportunities, including suggestions on how to prosper from the opportunities. This report starts that process and provides a baseline for development of the Strategy.

## The Baseline Inventory and Analysis

The Baseline Inventory and Analysis has helped provide an overview of current sustainable tourism activity in the Wadden Sea World Heritage site, identified gaps, synergies and provides a basis for discussion of possible future directions. By its very nature the work will always be incomplete and always on-going but at best it is a snap-shot of the current situation.

We have structured this document into key areas: (1) Marketing and Communication; (2) Qualification and Quality; (3) Infrastructure and Investments; (4) Market Research; (5) Environmental Education. We have also added in (6) Missing Links and Gaps and in (7) Future Directions we have listed some headlines for discussion as possible future directions.

## Contents

<b>1</b>	<b>Marketing and Communication</b>	<b>7</b>
1.1	<b>Active marketing within the market segment “nature tourism”</b>	<b>7</b>
1.1.1	Netherlands	7
1.1.2	Lower Saxony	7
1.1.3	Schleswig-Holstein	7
1.1.4	Denmark	7
1.2	<b>Development and promotion of World Heritage Wadden Sea products</b>	<b>8</b>
1.2.1	Netherlands	8
1.2.2	Germany	9
1.2.3	Lower Saxony	9
1.2.4	Schleswig-Holstein	9
1.2.5	Denmark	10
1.3	<b>Promotion of sustainable transport</b>	<b>11</b>
1.3.1	Netherlands	11
1.3.2	Germany	11
1.3.3	Denmark	12
1.4	<b>Special marketing campaigns featuring the Wadden Sea World Heritage Site</b>	<b>12</b>
1.4.1	Netherlands	13
1.4.2	Lower Saxony	13
1.4.3	Schleswig-Holstein	14
1.4.4	Denmark	14
1.5	<b>Inner marketing activities: communication of World Heritage topic to inhabitants</b>	<b>15</b>
1.5.1	Netherlands	15
1.5.2	Lower Saxony	15
1.5.3	Schleswig-Holstein	15
1.5.4	Denmark	15
1.6	<b>Inner marketing activities: communication of World Heritage topic to tourism stakeholders</b>	<b>15</b>
1.6.1	Netherlands	15
1.6.2	Lower Saxony	15
1.6.3	Schleswig-Holstein	16
1.6.4	Denmark	16
1.7	<b>Communication of World Heritage topic to national tourist boards</b>	<b>16</b>
1.7.1	Netherlands	16
1.7.2	Lower Saxony	16
1.7.3	Schleswig-Holstein	16
1.7.4	Denmark	16
<b>2</b>	<b>Qualification and Quality</b>	<b>17</b>
2.1	<b>Existing further qualification programmes for tourism stakeholders on sustainable tourism / nature tourism</b>	<b>17</b>
2.1.1	Netherlands	17
2.1.2	Lower Saxony	17
2.1.3	Schleswig-Holstein	17
2.1.4	Denmark	17
2.2	<b>Existing further qualification programmes for tourism stakeholders on World Heritage</b>	<b>17</b>
2.2.1	Netherlands	17
2.2.2	Lower Saxony	17
2.2.3	Schleswig-Holstein	18
2.2.4	Denmark	18

<b>2.3 Existing partner schemes (e.g. national park partners) with assessment criteria &amp; partnership agreements ensuring the sustainability of tourism offers</b> .....	18
2.3.1 Netherlands .....	18
2.3.2 Lower Saxony .....	18
2.3.3 Schleswig-Holstein .....	19
2.3.4 Denmark .....	19
<b>2.4 Implementation of quality labels / eco-labels to secure a sustainable performance of tourism businesses</b> .....	20
2.4.1 Netherlands .....	20
2.4.2 Lower Saxony .....	20
2.4.3 Schleswig-Holstein .....	20
2.4.4 Denmark .....	20
<b>3 Infrastructure and Investments</b> .....	<b>21</b>
<b>3.1 Visitor guidance: information boards, trails &amp; signposting informing about the Wadden Sea World Heritage</b> .....	21
3.1.1 Netherlands .....	21
3.1.2 Lower Saxony .....	21
3.1.3 Schleswig-Holstein .....	22
3.1.4 Denmark .....	22
<b>3.2 Exhibitions at visitor centres, museums &amp; sites informing about the Wadden Sea World Heritage</b> .....	23
3.2.1 Netherlands .....	23
3.2.2 Lower Saxony .....	23
3.2.3 Schleswig-Holstein .....	24
3.2.4 Denmark .....	24
<b>3.3 Sustainable transport solutions</b> .....	24
3.3.1 Netherlands .....	24
3.3.2 Lower Saxony .....	24
3.3.3 Schleswig-Holstein .....	25
3.3.4 Denmark .....	25
<b>3.4 Funding for infrastructure projects</b> .....	25
3.4.1 Netherlands .....	25
3.4.2 Lower Saxony .....	25
3.4.3 Schleswig-Holstein .....	26
3.4.4 Denmark .....	26
<b>4 Market research</b> .....	<b>27</b>
<b>4.1 Available market research data on the nature tourism segment - target group's perceptions &amp; market volumes</b> .....	27
4.1.1 ... in the Netherlands .....	27
4.1.2 ... in Germany .....	27
4.1.3 ... in Denmark .....	28
<b>4.2 Available market research on the knowledge, image &amp; acceptance of the World Heritage Status</b> .....	28
<b>4.3 Research data on economic effects of tourism in the Wadden Sea Region</b> .....	28
<b>4.4 Research data on environmental impact of tourism in the World Heritage area</b> .....	29
<b>4.5 Comparability of market research data</b> .....	29
<b>4.6 Existing research institutions / universities in the area that support the region's market research activities</b> .....	29
<b>5 Environmental Education</b> .....	<b>30</b>
<b>5.1 Existing environmental education programmes / concepts</b> .....	30
5.1.1 ... in the Netherlands .....	30

- 5.1.2 ... in Germany..... 30
- 5.1.3 ... in Denmark..... 31
- 5.2 Existing education programmes on World Heritage Wadden Sea ..... 31**
- 5.3 Training programmes for rangers and guides ..... 31**
- 5.4 New concepts for environmental education, featuring the World Heritage Wadden Sea  
32**
- 6 Missing Links and gaps and recommendations ..... 33**
- 6.1 Marketing and communication..... 33**
  - 6.1.1 ... in the Netherlands..... 33
  - 6.1.2 ... in Lower Saxony ..... 33
  - 6.1.3 ... in Schleswig-Holstein ..... 34
- 6.2 Qualification & Quality ..... 34**
- 6.3 Infrastructure & Investment..... 34**
- 6.4 Market Research ..... 35**
- 6.5 Environmental Education ..... 35**
- 7 Future Directions ..... 36**

# 1 Marketing and Communication

## 1.1 Active marketing within the market segment “nature tourism”

### 1.1.1 Netherlands

Nature tourism is central to Waddensea tourism. Perhaps nature is not always the key object, like in eco-tourism. Often the Wadden Sea and the islands are the “scene”/décor for enjoying the “great outdoors” and tranquility.

### 1.1.2 Lower Saxony

Nature tourism belongs to the main tourism segments, as defined in marketing strategies of the regional marketing organizations. Nature tourism is intensively promoted and classified as a market segment suitable to promote the low season.

### 1.1.3 Schleswig-Holstein

Nature tourism belongs to the main tourism segments, as defined in marketing strategies of the regional marketing organizations. Nature tourism is intensively promoted and classified as a market segment suitable to promote the low season.

### 1.1.4 Denmark

Judging by the homepage of Destination Southwest Jutland the main products are nature and culture. The main message is the unique nature of the entire area – not just the Wadden Sea. According to the tourism operators in the area the main attraction is the North Sea and the wide and white beaches.

The main accommodation product is the many second homes, which are concentrated in areas in the destination. These areas are often close to beaches and the tourists interpret most of these areas as nature in their own right or nature-like. Nature does not have to be “wild and authentic”, as long as it feels like nature (survey, 2008, Ringkøbing Skjern Municipality). Probably this goes for most of the tourists to Destination Southwest Jutland as well.

So nature tourism is often associated with a number of other factors and they all comprise the reason to visit Destination Southwest Jutland. According to VisitDenmark, nature is the number one reason to go to Denmark, but it is not clear what this concept actually consists of and how “wild and authentic” it has to be before it is no longer nature. A one-week stay at a second home close to the beach and in natural surroundings, that seems to be ok for most tourists.

The above mentioned is mainly focused on tourism with nature as a sort of frame / surrounding. However, there are also activities that are focused on nature experiences per se like organized seal watching trips, oyster safari, Black Safari® and many more.

## 1.2 Development and promotion of World Heritage Wadden Sea products

### 1.2.1 Netherlands

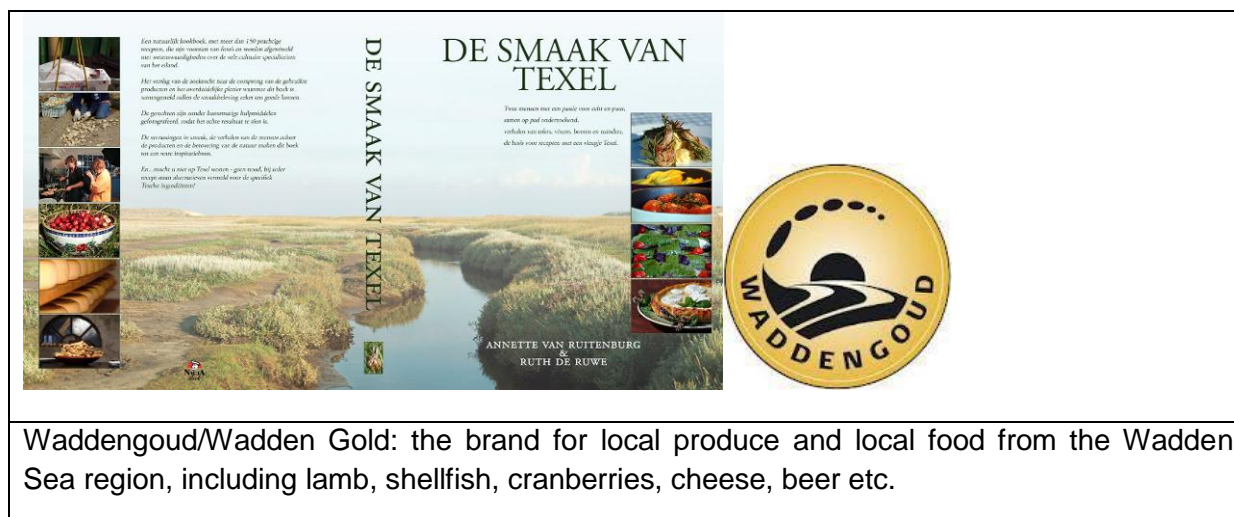
Especially on the islands, there is a growing market for local produce, e.g. “slow food” like cheese, lamb, cranberry, local beer etc. (for example Waddengoud label). There is potential for development of sustainable tourism and heritage tourism on the mainland shore of the Waddensea. For this potential to be used depends on proper marketing of that part of the Wadden Sea, as in general it is not yet seen as a destination, but mainly as a hub to the islands.

Currently World Heritage products are virtually non-existent. Certainly for the visitor World Heritage is not known as a brand yet. Entrepreneurs want to use the brand but do not know yet how and in which way, although the criteria for logo use are available in Dutch.

Every island and places of interest on the mainland has programme covering a variety of activities, basically going on most of the year. Some highlights are:

	
<p>Oerol (meaning everywhere): A 10 day outdoor cultural festival, one of the biggest in Europe with some 50.000 visitors every year</p>	<p>Demonstrations with life boat launch drawn by horses</p>
	
<p>The Texelround ultimate battle for beach cat sailors</p>	<p>The fishing days Harlingen, a multiday event mixing presentations on nautical economy, theatre, music</p>





Waddengoud/Wadden Gold: the brand for local produce and local food from the Wadden Sea region, including lamb, shellfish, cranberries, cheese, beer etc.

### 1.2.2 Germany

Several tour operators already offer packaged tours to Wadden Sea in Germany (Lower Saxony and Schleswig-Holstein, e.g. *One World Reisen, Gebeco, SKR Reisen, Ameropa, Nordsee Radreisen*

There are route descriptions for individuals: hiking trip wilderness Wadden Sea >> further route proposals for the whole area are to be developed (by WWF)

### 1.2.3 Lower Saxony

Offered products at [www.die-nordsee.de](http://www.die-nordsee.de) (products and website in German language only) are:

- Tideland for two in Butjadingen
- More tideland
- Adventure World Heritage Wadden Sea

Also on the website [www.ostfriesland.de](http://www.ostfriesland.de) some products are found in German only / information given on website also in Dutch and English.

Other products are the following:

- Ostfriesland/Landkreis Aurich - Exploring World Heritage Wadden Sea
- Langeoog - Island trip through the World Heritage Wadden Sea
- Neuharlingersiel - theme package 1 week World Heritage
- Langeoog - small island trip through the World Heritage Wadden Sea
- Promotion and sale of sustainable travel offers to/in the WHS Wadden Sea within a three-year co-operation with Deutsche Bahn on the topic „Fahrziel Natur“
- Conception, organisation and implementation of „migratory bird days in the National Park Lower Saxony Wadden Sea“ including ca. 150 events on the mainland and islands

### 1.2.4 Schleswig-Holstein

Several tour operators already offer packaged tours to the World Heritage Wadden Sea: *One World Reisen, Gebeco, SKR Reisen, Ameropa, Nordsee Radreisen*.

As in Lower Saxony there are route descriptions for individuals: hiking trip wilderness Wadden Sea >> further route proposals for the whole area are to be developed (by WWF).

Other products are listed below:

- Branded Wadden Sea products: tours / visits & combi-tickets can be combined with overnight-stays
- “Big Five” product (harbour seal, grey seal, porpoise, white-tailed sea eagle and European sturgeon)
- “Small Five” (shore crab, lugworm, sand shrimp, mud snail, cockle)
- “Flying Five” (dunlin, shelduck, oystercatcher, herring gull, Brent goose)
- Multimar Wattforum: expeditions for school classes: treasure hunts in the WHS (team work in small groups, self-organized, key competences of the BNE)
- Mud flats preservation centre „Schutzstation Wattenmeer“ Wattenmeer
  - Hooge: 4 days seminar "WH Wadden Sea"
  - Keitum/Sylt: guided tours „discover World Nature Heritage“
- IWSS, WWF and co-operation partner: WH discovering tour - small (cheap) paperback



### 1.2.5 Denmark

The Danish Wadden Sea area does not have World Heritage status. Since 2009 Destination Southwest Jutland has taken a number of initiatives / created a number of products. Some of these initiatives are listed below.

<p><b>Nature at the table</b></p> <p>Development and publishing of a cookbook that introduces the reader to a culinary journey along the North Sea and the Wadden Sea coast. The cookbook is also a showcase for approx. 40 restaurants and food producers.</p>	<p><b>Lamb festival</b></p> <p>The lamb festival is an attention creating initiative about lamb from the destination. It is a cooperation between producers, retailers and restaurants.</p>
<p><b>Under a Black Sun</b></p> <p>Under a Black Sun was the name of an art exhibition at the Round Tower in Copenhagen in 2012. The exhibition focused on the varied and living art environment in the destination.</p>	<p><b>Tirpitz</b></p> <p>The Wadden Sea project has granted means to development of a prospectus for fundraising in connection with Varde Museum’s continuing development work with the Tirpitz-exhibition in Blåvand.</p>

<p><b>Common PR-cooperation</b></p> <p>In 2009 Destination Southwest Jutland initiated a focused PR effort in order to increase awareness and branding of chosen products and events. The cooperation has been a success and it will be further developed in the years to come.</p>	<p><b>The Wadden Sea Centre</b></p> <p>The Wadden Sea project has granted means to development of a preliminary project regarding expansion of the Wadden Sea Centre. Based on the developed material approx. 30 mio. DKK. Have been fundraised from external sources.</p>
<p><b>Wind Centre, Fanø</b></p> <p>The Wadden Sea project has granted means to development of a prospectus to ensure the realisation of a European Wind Centre on the island of Fanø. The centre will be the focal point of the wind-based beach activities in the whole Wadden Sea area.</p>	<p><b>Art in Southwest Jutland (Kunstrunden)</b></p> <p>During the Easter holidays of 2012 91 artists, studios, and art museums opened their doors for exciting experiences. The Kunstrunden was marketed widely. 8 hotels took the initiative to market 'art stays' in connection with the Kunstrunden.</p>

## 1.3 Promotion of sustainable transport

### 1.3.1 Netherlands

Some big places on the mainland coast are well accessible by train (Harlingen/Den Helder), some by bus but not frequently, but it is not especially promoted linked to the Wadden Sea as such. Timetables except for buses to the ferries are not suitable for tourists.

The ferry company Doeksen is investigating the possibilities for sustainable door-to-door transport including luggage.

Currently the use of LNG instead of diesel as fuel for ferries is under investigation.

Biking is very popular and is regarded sustainable. Some entrepreneurs offer possibilities for electric bikes.

### 1.3.2 Germany

In the German regions a cooperation with the railway company Deutsche Bahn and Ameropa (travel agency) exists (Fahrziel Natur / Destination Nature), which offers the following:

- Promotion of trips by train to the World Heritage Wadden Sea
- Information how to get there
- National park partner's products are promoted via Deutsche Bahn / Ameropa
- Promotion of highlights and events
- Vouchers for attractions after booking
- Information leaflet about public transport connections within the region
- Last minutes action promoting specific World Heritage products > leaflets and 7.500 posters at 7.500 Ameropa travel shops
- Placement of products at B2B and B2C newsletters of Ameropa
- Fahrziel Natur Brochure 2011 features Wadden Sea

A presentation of Wadden Sea products is also to be found at the railway magazine DB mobil (4 pages, SMS & online competition).

### 1.3.3 Denmark

There are yet no specific activities concerning promotion of sustainable transport.

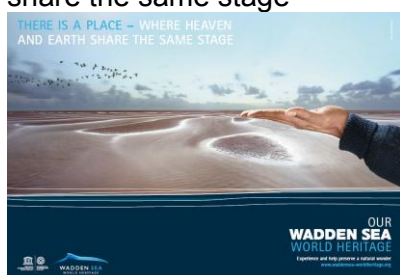
## 1.4 Special marketing campaigns featuring the Wadden Sea World Heritage Site

There is a joint website [www.waddensea-worldheritage.org](http://www.waddensea-worldheritage.org) in three languages, including information about the Wadden Sea World Heritage, the tourism regions, highlights, education offers, events, visitor centres and accommodation places.

A joint logo Wadden Sea World Heritage has been developed (3 language versions) to be used by tourist boards and tourist information centres, national park partners, counties and NGOs.

A World Heritage catalogue was prepared where all jointly produced material is presented to the stakeholders (such flyer, poster, pin, sticker, exhibition)

For the first time a joint campaign with all stakeholders in the Wadden Sea has been implemented (budget 80.000 – 100.000 Euro): “There is a place – where heaven and earth share the same stage”



- Aims: supra-regional attention, integration of regional partners, knowledge & information transfer
- Advertisements & posters developed, to be used by the municipalities in their accommodation directory for free
- Online banner developed to be integrated at partner's websites'
- Story-hunting about the World Heritage Wadden Sea >> stories are presented at the website, 'YouTube' & via social media



Development of so called „Wattenmeer-Profilkarten“, which are used to promote trips/excursions by the German tourism board for external marketing.

### 1.4.1 Netherlands

Friesland Marketing is using the WHS brand now in their international campaigns, mainly on fairs.

A project for joint Waddenmarketing (Beleef de Wadden), sea and mainland and islands including WH WS, had been prepared under lead of Fryslan Marketing together with other regional dutch marketing organization. Fryslan Marketing is still waiting for the letter of confirmation of the asked subsidy (SNN).

Two press trips took place with the Netherlands in June 2011 - 1 with German press representatives to the Netherlands and 1 with Dutch press representatives to Germany.

### 1.4.2 Lower Saxony

There are many activities/marketing campaigns featuring the World Nature Heritage in the Lower Saxony Wadden Sea region, for example:

- Development of a World Heritage map for foreign visitors (by German Tourist Board & German World Heritage Association)
- EUROPARC Germany brochure: presentation of World Heritage Wadden Sea Germany
- Press trips with the Netherlands in June 2011 - 1 with German press representatives to the Netherlands and 1 with Dutch press representatives to Germany
- Contents on the topic WHS to be placed in print media, on National Park homepage and on tourism websites
- Presentation at the ITB Berlin 2010 + 2011: Large-scale banner, press conference, distribution of postcards and flyers, fundraising campaign incl. press release
- Production & placement of posters and flyers of "Welcome to the World Nature Heritage" (Willkommen im Weltnaturerbe); large-scale outdoor banners
- Production of signposts for fair participation was planned in 2011
  - >> signs show distances (in km) to familiar UNESCO World Heritage regions
  - >> aim is to imply the closeness to the World Heritage Wadden Sea to the guests compared to other WHS
- Discovering the Wadden Sea as adventure is a planned marketing theme which shall cover all kinds of activities to experience the World Nature Heritage. First concrete action of "Adventure Nature" (Abenteuer Natur) is an advertisement in publications of the Tourism Marketing Niedersachsen
- Presentation / exhibition of the Wadden Sea at UNESCO-World Heritage Day in Essen on June 6, 2010
- Events on the occasion of the anniversary of the inscription of the Wadden Sea as World Heritage
- A 15-minute World-Heritage movie has been produced for 3Sat with the Headline "Natural Treasures of the World"
- A photo series of the World Heritage Wadden Sea is planned to communicate the region visually.
- Event on the occasion of the anniversary of WHS with the Lower Saxony prime minister
- Event concerning the appointment: „400 children in the mud flats make the UNESCO-large letters“
- Presentation of WHS Wadden Sea in the German embassy in London
- Organisation and implementation of a WHS campaign for the EDR-region
- Development of a photo database for using in destinations and by Nordsee GmbH
- Development of Roll-ups to the criteria of the WHS designation, to be placed in the Lower Saxony parliament within the 25th anniversary of National Park in 2011 and the migratory bird days

### 1.4.3 Schleswig-Holstein

Many examples for active marketing can be found in the Wadden Sea region Schleswig-Holstein, as listed below:

- World Heritage Wadden Sea exhibition from Aug – Sep 2011 at the house of representatives of the counties SH and NS at Berlin >> 1.300 visitors, bilingual brochure about exhibition
- Development of a World Heritage map for foreign visitors (by German Tourist Board & German World Heritage Association)
- EUROPARC Germany brochure: presentation of World Heritage Wadden Sea Germany,
- Specific marketing fund is used (since 2010) to promote the World Heritage to attract new guests to the North Sea S-H with following marketing goals: year 1: attention increase, name recognition & image; year 2: distribution of specific products.
- Master plan North Sea includes the World Heritage theme as important quality aspect that supports the uniqueness and authenticity of the North Sea SH and quality of holiday experience >> the theme nature is playing a special role after the awarding of the WHS.
- Promotion of the “five-products” via leaflets, posters, postcards at tourist information offices and national park centres & via tourism enterprises (on demand).
- Presentation at the ITB Berlin 2010 + 2011: Large-scale banner, exhibition, press conference, 2 workshops for tour operators and presentations towards politicians about WH
- Special supplement World Heritage Wadden Sea in the May 2010-edition of the newspaper “Die Welt” (6 pages) & presentation of this content at their website
- Placement of advertisement and PR-article in two editions of the Globe Magazine and its website (National Geographic readers)
- Placement of 28 pages PR articles at Intersport’s Magazine “sportlife”, distribution at 1.400 Intersport shops in week 28, 2010
- Placement of a content special on World Heritage Wadden Sea at **www.wissen.de** (6 weeks in 2010): incl. competition & other join-in actions
- Placement of online banner about five-animals at a network of daily newspapers with link to the North sea website (2010)
- Placement of a special supplement of 20 pages at 4 German newspapers (Frankfurt, Köln, Berlin)
- Press trip on World Heritage theme for 11 journalists in August 2010
- Placement of WH topic & competition at German Lotto customer magazine in 3 federal counties >> 1.000 readers participated in the competition
- Online guide to nature experience at the North Sea at **www.nordseetourismus.de** (since June 2010), containing info about WH, national park, info centres, the “five products” and a booking platform for nature tourism products
- Presentation of the Wadden Sea exhibition in Berlin, 3.Oct 2010
- Presentation of the topic at 20.-21. Nov. 2010 in Wetzlar
- Wadden Sea enthusiast’s quiz, online competition promoted via Birgitte-woman.de, Birgitte.de, Stern.de, Google Adwords, poster campaign in NRW
- Creativity campaign Wadden Sea SH (plan)
- Production of image films (plan)
- Advertisement at the SH magazine “Land&Meer” (plan)
- New marketing project “photo coast” is planned

### 1.4.4 Denmark

The Danish Wadden Sea area does not have World Heritage status.

## 1.5 Inner marketing activities: communication of World Heritage topic to inhabitants

### 1.5.1 Netherlands

Knowledge of the WHS among the local population is limited, as the visibility of WHS is not well known. It isn't measured, most people know it is a world heritage but there are no signs.

### 1.5.2 Lower Saxony

Some inner marketing activities have already been realised to communicate the World Heritage topic to inhabitants:

- Information events in every place to raise awareness and inform the local people and the stakeholder (more than 3000 persons were reached by this)
- Short two-page information about WHS Wadden Sea for the staff in tourist information centres
- Present banner / poster / flyer for local promotion
- Implementation of the North Sea tourism day on main topic World Nature Heritage

### 1.5.3 Schleswig-Holstein

Recent representative surveys indicate that the World Heritage status is known by many inhabitants (up to 50%).

- Information on World Heritage activities and projects at the annual "Fachtagung" of tourism stakeholders (about 120 -160 participants)

### 1.5.4 Denmark

The Nationalpark Vadehavet has a cooperation with the German counterpart in Schleswig-Holstein about carrying out a survey amongst the local population in the two areas concerning their views and attitudes towards the national parks. It is carried out in December 2012. A follow up round of interviews will complete the survey. The survey is carried out simultaneously in Denmark (Southwest-Jutland) and Germany (Schleswig-Holstein).

## 1.6 Inner marketing activities: communication of World Heritage topic to tourism stakeholders

### 1.6.1 Netherlands

Generally speaking WHS is known to tourism stakeholders, but actual ideas on how to use this as a marketing tool or as a brand is not applied yet because they say they need practical tools that they can use, pictures, photos, text about the WH WS. They do use the Waddensea, beautiful surroundings as a pay-off slogan, and sometimes say in words in their ads: "situated next to the WH WS..."

### 1.6.2 Lower Saxony

World heritage working group has existed since 2010, involving the following stakeholders: municipalities, national park administration, chamber of commerce, university.

Examples of main activities concerning communication of WH topic to tourism stakeholder include:

- Tourism day, 14<sup>th</sup> Jan 2010, motto "Awarded! Welcome to the World Heritage"
- Workshop on June 17-18, 2010 for participants from tourism businesses and nature protection: gathering suggestions on how the World Heritage can be promoted in roadshows, fairs, events

- Annual conference of the East Friesian landscape in Emden May 29, 2010 on World Heritage Wadden Sea (approx. 200 participants)
- Inner marketing action in 2010, informing all tourist information offices and national park centres about the WHS
- Communication guideline for World Heritage communication developed
- World heritage forum exists as a series of seminars for tourism actors (lectures and space for discussions)
- Implementation of different thematic marketing workshops WH (e.g. press) for stakeholder and staff of tourist organisations
- Implementation of „forum WH Wadden Sea“, that gives the possibility of exchange of experience of stakeholder in the Wadden Sea region
- Regular meetings of the working group WH Lower Saxony, with representatives from industry, tourism, nature conservation and science, targeting a continuing information exchange and development of new ideas
- Implementation of marketing working cycles for stakeholder involvement

### 1.6.3 Schleswig-Holstein

World heritage working group has existed since 2010, involving the following stakeholders: North Sea tourism services, national park administration, tourism agency SH, WWF, IWSS, Schutzstation Wattenmeer, Fachhochschule Westküste, Dithmarschen Tourismus, State Ministries of environment and economies.

Conferences “Integrating nature experience in tourism products” took place (2010 and 2011, about 120 participants each) featuring the World Heritage.

National park news inform about world heritage and trilateral cooperation (target group: tourist info centres, politicians, municipalities).

### 1.6.4 Denmark

There has been no direct communication to tourism stakeholders about positive or negative aspects of a possible World Heritage status besides the public debates over the years.

## 1.7 Communication of World Heritage topic to national tourist boards

### 1.7.1 Netherlands

Fryslan Marketing is responsible for connecting the NBTC Coastal campaign to the WH campaign. This hasn't been shown in the NBTC campaign yet.

### 1.7.2 Lower Saxony

There are no special campaigns yet which are targeting communication of WH to national tourist boards.

### 1.7.3 Schleswig-Holstein

GTV (German Tourism Association) visit Wadden Sea SH (35 participants): presentation of World Heritage site and concept, national partner scheme and big-five product

### 1.7.4 Denmark

There are no activities yet.



## 2 Qualification and Quality

### 2.1 Existing further qualification programmes for tourism stakeholders on sustainable tourism / nature tourism

#### 2.1.1 Netherlands

Programmes for tourism stakeholders on sustainable tourism are especially well underway in the national parks (Texel, Schiermonnikoog and Lauwersmeer). The Green key certification is slowly gaining momentum but apart from that this area is very much in its infancy. There are programs for hospitality.

#### 2.1.2 Lower Saxony

There will be developed and implemented further education programmes in co-operation with the 2 educational institutions LEB and NNA for multipliers, for WH experience offers of the National Park partners and National Park guides.

There are planned/offered workshops on language skills (English) for staff of tourism boards/information centres, but not specifically on sustainable tourism.

#### 2.1.3 Schleswig-Holstein

The project “further education at the North Sea coast” 2010 – 2012 does not yet include seminars on sustainable tourism / nature tourism.

A symposium on the topic „nature experience in tourism offers“ took place in Husum.

#### 2.1.4 Denmark

A number of courses have been offered to tourism stakeholders over the past few years, but not specifically on sustainable tourism or nature tourism.

### 2.2 Existing further qualification programmes for tourism stakeholders on World Heritage

#### 2.2.1 Netherlands

So far this is not an issue yet within the tourism industry.

The quality of other existing education programmes is ok, but until now it has not widely perceived as an opportunity for sustainable growth of tourism.

#### 2.2.2 Lower Saxony

World heritage forum exists as a series of seminars for tourism actors. Lectures on World Heritage are offered to qualify stakeholders in the region: seminars to foster identification with the World Heritage status in the region.

Further ideas on qualifying stakeholders in three steps have been created: 1st step - info seminar; 2nd step - multi-day workshop presentations & media training; 3rd step - raise

general Wadden Sea awareness among the inhabitants with the help of media (print, radio, TV).

There exists an education project “quality management for nature-tourism products within the World Heritage Wadden Sea” 2011 – 2012, including – among other courses – seminars about uniqueness of WHS, sustainable development, biodiversity, practical seminars on product development and concepts for guided tours to the World Heritage and English-workshop “Welcome to the Wadden Sea World Heritage.”

### 2.2.3 Schleswig-Holstein

There is a project “further education at the North Sea coast” 2010 – 2012 (240.000 Euro) ([www.nordsee-tourismus-weiterbildung.de](http://www.nordsee-tourismus-weiterbildung.de)), including – among other courses – English course for Wadden Sea Guides (incl. Five-products) & tourism companies, Danish course for beginners, regional studies incl. role & impact of WHS and 2 seminars on World Heritage.

### 2.2.4 Denmark

This is not an issue at the moment.

## 2.3 Existing partner schemes (e.g. national park partners) with assessment criteria & partnership agreements ensuring the sustainability of tourism offers

### 2.3.1 Netherlands

Not the whole area along the Wadden Sea in the Netherlands is covered by National Parks. Most of the stakeholders want to make use existing programs like Waddengoud, Green Key and not another certification scheme.

### 2.3.2 Lower Saxony

In Lower Saxony there are the National Park "Wadden Sea of Lower Saxony" and the Biosphere Reserve "Wadden Sea of Lower Saxony" that established a partnership network in the region, which is based on criteria on sustainability for these partners as basis for developing an exemplary region for sustainable tourism. Businesses, which are interested, can become Biosphere Reserve or National Park partners.

List of existing partners and application for becoming a partner can be found under [www.nationalpark-partner-wattenmeer-nds.de/partner](http://www.nationalpark-partner-wattenmeer-nds.de/partner)

### 2.3.3 Schleswig-Holstein

In Schleswig-Holstein there is the National Park "Wadden Sea Schleswig-Holstein" that realised a National Park partnership scheme, which is a strong cooperation between the National Park administration, municipalities, environmental organizations and businesses located in the region, which are closely linked to the National Park "Wadden Sea Schleswig-Holstein". Main objective is to protect the natural environment and to make it possible to experience for visitors to the west coast.

Assessment criteria and partnership agreements do exist for the following categories of tourism enterprises:

- accommodation & gastronomy
- nature & adventure
- places & info sites
- travel & transport

List of existing National Park partners and application for becoming a partner you will find under [www.nationalpark-partner-sh.de](http://www.nationalpark-partner-sh.de).

Moreover 13 further education seminars took place in 2011 with WH as topic for National Park Partners and a two week seminar for volunteers of nature NGOs with 261 participants in total.

### 2.3.4 Denmark

Within the parameters of the national park this is probably possible – perhaps not now, but in the future. Outside the national park it is not part of the new destination strategy – nor has it been focused on. Neither the tourism stakeholders, nor the authorities have voiced a particular concern about ensuring sustainable tourism offers in the destination.

Destination Southwest Jutland voices concern that such quality partnership schemes across the three countries are based on different views on what is in focus. According to Destination Southwest Jutland the focus must be on win-win concepts. In Denmark the Wadden Sea area is a product like any other product and this product can ensure growth and prosperity in the area through increased revenue for the tourism operators. It is felt that there is a different focus in for instance the German areas where focus is perceived to be much more on nature preservation and not business opportunities.

So far the Green Key has been on the market in Denmark for many years, but it is probably not considered a particular instrument concerning sustainability. Most hotels in Denmark are members of the Green Key. In Denmark there has been a national program in the late 1990s and early 2000 called Destination 21. That program had high ambitions about introducing sustainable tourism development on a destination level. However, the program had two particular flaws. Firstly, it was a very technical and bureaucratic system that took a lot of manpower to uphold. Secondly, it was impossible to sell the program to the tourism stakeholders, as it was not possible to show a positive correlation between sustainable efforts on behalf of the tourism stakeholders and increased market demand. This is, by the way, still a problem today.

## **2.4 Implementation of quality labels / eco-labels to secure a sustainable performance of tourism businesses**

### **2.4.1 Netherlands**

As mentioned before the Green key is slowly kicking off, apart from that the national parks (Only few areas of the area around the Dutch Waddensea!) in the Netherlands, in general, are considering the concept of the EUROPARC Charter for Sustainable Tourism. At present only Weerribben-Wieden National Park is Charter certified, but is expected that within 5 years at least 10 national parks (among them the Wadden national parks) will be Charter certified.

### **2.4.2 Lower Saxony**

Viabono is not appreciated at all. Own criteria have been defined. Niedersachsen has developed a proper and applicable programme, first as National Park partner and later with the term World Heritage partner. It is intended to expand certificated quality products within the project "Natur Erleben".

### **2.4.3 Schleswig-Holstein**

Viabono certification is a pre-condition for accommodation and gastronomy businesses as well as for municipalities to join the national park partner scheme. If the applying business has not received the Viabono certification, it can apply for it. Application documents are also provided where the application documents for becoming a National Park partner are given.

### **2.4.4 Denmark**

Quality is one of the key elements of modern destination development that Destination Southwest Jutland is working with. But quality is a broad term and it is related more to tourism products and services than to sustainable tourism products and services. Sustainability is part of the destination strategy, but it does not play a very dominant role – so far.

## 3 Infrastructure and Investments

### 3.1 Visitor guidance: information boards, trails & signposting informing about the Wadden Sea World Heritage

A number of joint products have been produced in cooperation with the Wadden Sea stakeholders in the regions:

- World Heritage information modules in German and Dutch (with English translations) have been produced (left)
  - Lower Saxony: 18 modules at tourist info centers and national parks houses (2 indoor versions with touch screen monitor, 16 outdoor versions)
  - Schleswig-Holstein: 65 modules have been placed for tourist information centres, national park centres and outdoors
- A motorway road sign (Dutch and German) (right)
  - 5 in Lower Saxony
  - 2 in Schleswig-Holstein
  - In preparation in the Netherlands



#### 3.1.1 Netherlands

No further material connecting to World Heritage exists as such with the WS Wh logo but there are a lot of information boards, trails and signposting in this region, that have been attracting tourists already for a long time.

#### 3.1.2 Lower Saxony

In addition to the joint WH material, the national park visit information system also contains the WH logog. Other systems have been developed so far:

- Island Juist: "Otto LEEGE Explorer's trail" provides visitors the possibility to discover the nature of the dyke-island and the adjacent Wadden Sea
- Information about WH and National Park in the island trains and island ferries (e.g. ferry Langeoog- and Borkum)

### 3.1.3 Schleswig-Holstein

Three steps are planned:

1. Situation analysis of visitor guidance system, definition of objectives & measures & cost analysis
2. Catalogue for an ideal visitor management system in the whole World Heritage region (transnational project) / Joint uniform visitor management system for the whole Wadden Sea area
3. Regional implementation of elements of the visitor management system

In the counties Dithmarschen and Nordfriesland following activities are going on:

- Installation of signposts, nature trails and pavilions at World Heritage access points
- several municipalities showed interest to invest in such information modules too

The WH-modules complete the already existing visitor information system of the National Park, comprising 18 pavilions (with 9 sign boards each), about 350 single info elements (sign boards, maps etc.) and 15 nature trails (with 12-17 sign boards each) at numerous access points to the National Park.

### 3.1.4 Denmark

Nothing of this sort exists that relates to World Heritage. A number of different stakeholders have information on the destination in general and the Wadden Sea area in particular. Some of these are shown below. It is not an exhaustive list as this would go too far in this particular context.

#### **Destination Southwest Jutland (the main portal to the destination)**

There are information boards, trails and signposting informing about geography, landscape, routes, nature, culture and experiences in Destination Southwest Jutland. Destination Southwest Jutland has over the past three years worked on setting up a user friendly homepage for all the target groups that the destination works with. The homepage can be seen at <http://southwestjutland.com/intro/> - this is the English version of the homepage.

#### ***The Nationalpark Vadehavet***

The Nationalpark Vadehavet has in its action plan stated that interpretation, teaching and research are prioritized action points in the period 2013-18. The plan refers to the many private and public / semi public stakeholders that work with interpretation and knowledge transfer at different levels. It is stated that a number of private stakeholders have in the past few years established themselves as local spare time guides.

The action plan refers to a number of new types of interpretation; indirect interpretation through telephone numbers on poles spread around the landscape to GPS-tracking through smartphones. Through the project “put nature in the pocket” 5 Bluetooth transmitters were placed in the landscape around the city of Ribe in 2010. Through this the guests can download maps and film that are specific for the time of year and texts about nature and culture. According to local tourism operators this initiative does not seem to work as planned.

The nationalpark is part of a number of interpretation activities – local, regional, national and transnational, for instance [www.mitvadehav.dk](http://www.mitvadehav.dk) and the International Wadden Sea School.

### ***The Wadden Sea interpretation forum***

At the address [www.vadehav.dk](http://www.vadehav.dk) 25 interpretation centres are presented in one homepage under one slogan: Nature, Man, Culture (Natur, Menneske, Kultur). This homepage is a portal to nature and culture interpretation in and around the Wadden Sea area. The homepage is only available in Danish (or so it seems).

### ***The Wadden Sea Centre***

The Wadden Sea Centre is one of 15 interpretation centres in and around the Wadden Sea area. It is in the middle of the Danish part of the Wadden Sea. It gives hands on experiences with the tidal area. It has four professional nature interpreters and they make arrangements for all kinds of groups. The homepage features videos with the rangers called Wadden Sea TV. The homepage of the centre can be seen at <http://www.vadehavscentret.dk/en>.

### ***Private tourism operator***

A private operator has been quite successful in selling a number of nature based products. These products go under the brand “Black Safari” (sort safari). It translates poorly, but it all refers to guided tours into the Wadden Sea area. At first the was focus on the term “Black Sun”, which refers to when thousands and thousands of starlings flock and dance ballet in the air – especially in the autumn. The homepage can be seen at <http://www.sortsafari.dk/default.asp?next=false&objtype=artikel&func=showdetail&menuid=1011&id=1011&ilanguage=dansk>.

## **3.2 Exhibitions at visitor centres, museums & sites informing about the Wadden Sea World Heritage**

### **3.2.1 Netherlands**

It is slowly developing; e.g Ecomare visitor centre has an outdoor picture exhibition on WHS. There is scope for more activities on this issue, e.g. The Wadden Sea visitor centre network can play a major role in raising the WHS Profile.

The Dutch visitorcentres are working together on this theme, sharing databases, collections etc.

A lot about nature is haepening in the area, and about culture, but not under the umbrella or with the look and feel WH WS. There will be a new visitorcentre of Fryske Gea soon about Waddensea and the culture of gaining land from the sea soon on the mainland Fryslan (Marrum).

### **3.2.2 Lower Saxony**

Main activities concerning infrastructure at visitor centres, museums and sites, are the following:

- Transformation of Nationalpark-centres in Cuxhaven and Wilhelmshaven into UNESCO WHS centres in 2011
- New exhibition contents in other Nationalpark houses (e.g. Dorum- Neufeld) in 2012
- Restoration of national park centres at island Baltrum incl. new signposting and at Butjadingen
- Restoration of historic navigation marks from 1872 at island Borkum

- Extension of national park centre “Land Wursten”: new building, re-design of exhibition, laboratory and seminar rooms, 2 new aquariums
- Lighthouse “Roter Sand” (historical monument at the sea): indoor & outdoor conservation and restoration measures
- Island Borkum: additional passenger building at the berth of the Feuerschiff
- Island Spiekeroog: 2 information huts will be located east of the Environment Center Wittbülten as well as at the Old Harbour
- Further experience stations at the location "Schwimmende Moor" in Sehestadt, municipality of Jade
- For kids and youth: the scientific station "World Heritage Wadden Sea" will be built in Schillig and an "Climate Change" adventure trail will be developed in the municipality Sande
- New observation tower & information panels to inform about the species, habitats and protection goals at the National Park center in Dorum-Neufeld
- IDEA "mobile concept": World Heritage Wadden Sea shall be experienced through selected topics. Therefore an exhibition container will take the Wadden Sea to well-frequented locations all over Germany and the Netherlands with the aim to raise interest for this unique nature.

### 3.2.3 Schleswig-Holstein

Main activities concerning infrastructure at visitor centres, museums and sites, are the following:

- Restoration of a museum house at Hallig Langeneß and update of information about World Heritage Wadden Sea
- Multimar Wattforum in Tönning: 2010: special exhibition about World Heritage Wadden Sea; development of further exhibition parts on this topic (120-140 sqm, incl. play stations)

### 3.2.4 Denmark

The Fisheries and Maritime Museum in Esbjerg is a main information center at the West coast even though but it is not related to World Heritage. The museum is an important conveyer of information and knowledge about the area's history and identity. The museum has status of maritime research facility.

## 3.3 Sustainable transport solutions

### 3.3.1 Netherlands

As stated earlier most parts of the Wadden Sea mainland coastline and villages have good or reasonable access by public transport. On the islands (apart from Texel), use of private cars is not allowed or very limited. Only Schiermonnikoog en Vlieland are prohibited to bring your own car.)

On most islands the bike is **the** way of transport, there is a good bus transport on the islands and luggage transport.

### 3.3.2 Lower Saxony

There is a very popular bus called Urlaubibus, which is especially intended for a sustainable transport of guests (a ticket costs only 1 Euro). This bus goes in the East Frisian



Ems-Jade region. Concerning whole Wadden Sea region public transport connections need to be improved.

### 3.3.3 Schleswig-Holstein

Concerning sustainable transport you can find bicycle buses & possibility to take bikes on almost all ferries and on some excursion boats.

Inner-regional public transport connections are not sufficient, there is a need for a better cooperation with the public transport companies, ideas have been developed by the LVS (Landesweite Verkehrs-gesellschaft), e.g.: special Wadden Sea campaigns in the train; the introduction of a Wadden Sea ticket, but further discussion in this direction are needed.

### 3.3.4 Denmark

A number of cycle initiatives are under way in the area – for instance island hopping – from Sylt to Rømø, Mandø and Fanø. Denmark has a rather good cycle infrastructure – for instance the national bicycle route Marguriteruten that follows Denmark's entire coastline. Destination Southwest Jutland focuses on this means of transportation primarily because there is a demand for such initiatives – not because they are sustainable.

But other than that there seem not to be that many transport solutions that are particularly sustainable. Most of the infrastructure is based on private transportation by car. The main product is the second homes and access to these homes requires transportation by car – in most cases.

## 3.4 Funding for infrastructure projects

### 3.4.1 Netherlands

Regional governments have various funding possibilities but not especially for WH Wadden Sea projects, so integrated in other projects there are possibilities.

### 3.4.2 Lower Saxony

There is a special investment programme for national UNESCO World Heritage projects (Federal Ministry of Transport, Building and Urban Development), 2,1 Mio. funding dedicated to the German Wadden Sea from 2010 – 2014.

An Interreg 4a project “presentation of the World Heritage Wadden Sea” with a ca. 1 Mio. Euro total budget is a Dutch – German cooperation about:

- Nature database
- Inner marketing
- Networking nature and tourism

Furthermore there is lobbying for financial governmental support for marketing the World Heritage and developing an exemplary region for sustainable tourism.

The Lower Saxony state programme "Natur erleben" (Experience Nature) provides additional funding for projects at the World Heritage area.

### 3.4.3 Schleswig-Holstein

The above mentioned special investment programme for national UNESCO WH projects also applies to Schleswig-Holstein.

An Interreg 4a project "tourism at the North Sea coast (2010 – 2013) with a ca. 1 Mio. Euro total budget is a German- Danish cooperation about:

- Market research
- Experience & knowledge exchange among tourism stakeholders
- Cross-border tourism products for German and Danish target groups
- Communication plan

An Interreg 4a project "nature and tourism at the German-Danish North Sea coast with special focus on National Parks (01.01.2012-31.12.2014) with a ca. 1 Mio. Euro total budget is about:

- Market research
- Knowledge exchange among NP administrations and with tourism org.
- Application NP-Partner scheme to DK
- Strategy for Sustainable Tourism
- Development of products
- Communication strategy

### 3.4.4 Denmark

The municipalities in connection with planning processes fund most infrastructure projects. Also, the municipalities support infrastructure projects on many levels – from brochures, material for maps to complicated, long lasting and expensive infrastructure projects. The recreative maritime zoning is financed by the municipalities, yacht clubs and the Nationalpark.

Some major infrastructure projects of national / regional significance are funded by the Danish state. National foundations like RealDania fund some more specific infrastructure projects. RealDania has at the moment a project that funds specific projects at specific locations in order to create more life in peripheral areas in Denmark. A project in Tønder Kommune in the Wadden Sea area is underway and it is funded by RealDania. A number of Interregprojects also fund different projects – one such project is connected to the Nationalpark Wadden Sea and the Destination Southwest Jutland.

## 4 Market research

There are currently no joint marketing research with covers the entire Wadden Sea World Heritage

### 4.1 Available market research data on the nature tourism segment - target group's perceptions & market volumes

#### 4.1.1 ... in the Netherlands

Market research is available at a national level at [www.monitorvrijtijdentoeerisme.nl](http://www.monitorvrijtijdentoeerisme.nl). This source is widely acknowledged and used by marketing organizations as well as by entrepreneurs. There are also regional investigations done, for example by Fryslan Marketing.

#### 4.1.2 ... in Germany

The following market research data is available in both German regions in Lower Saxony and Schleswig-Holstein:

Reiseanalyse (N.I.T. Kiel):

- German-wide survey about travel planning & tourism potentials for destinations
- Specific evaluation on destination level, vacation activities, motivation & tourism forms

Destination Brand (Institut für Management und Tourismus / FH Westküste):

- German-wide survey about potential interest for specific tourism forms and the destinations that are suitable for specific vacation activities (nature tourism is of high interest in Germany, and the North Sea is seen as a destination very much suitable for that)

INVENT:

- Research project defining lifestyles and target groups
- Information about consumer & travel behaviour of German nature and outdoor travellers

Market Research on foreign markets by German Tourist Board (DZT):

- Market information about foreign source markets, e.g. Netherlands, Denmark and others (but no specific target group information)

In Schleswig-Holstein there is a county-wide guest survey, which is carried out on a regular base. It contains:

- Target group knowledge / data about target group' motivation & activities (visit of nature attractions & national park centres is of high interest)
- Comparisons among sub-regions

Furthermore there is a tourism barometer (Sparkassenbarometer) for the whole county of Schleswig-Holstein existing, which is published annually and compiles the following data:

- Development of supply and demand
- Official statistics and statistics about the grey accommodation market
- Trends of tourism attractions

- Annually differing specific topics of the tourism industry / trends in tourism (e.g.: 2012: tourism funding, 2010: nature tourism)

In Lower Saxony there is a compilation of facts based on official statistics and GfK Travelscope (tourism forms):

- Tourismus in Niedersachsen - Zahlen, Daten , Fakten

#### 4.1.3 ... in Denmark

Market research is available at a national level and is produced by VisitDenmark and the Danish Nature Agency. VisitDenmark carry out market research on a regular basis and most tourism operators – private and public – use this information. In the years to come, Destination Southwest Jutland and the Nationalpark Vadehavet will probably carry out their own market research in cooperation with local and regional actors. This is a consequence of the new destination tourism strategy.

## 4.2 Available market research on the knowledge, image & acceptance of the World Heritage Status

This type of research is not available in the Denmark, Lower Saxony and the Netherlands, but the ETFI is making a study to be released in summer 2013 (NL).

In Schleswig-Holstein there are 3 surveys carried out with specific focus on the name recognition and knowledge about the World Heritage site:

SÖM-Watt survey:

- Germany-wide survey on knowledge about World Heritage Wadden Sea (2010: 13% named Wadden Sea as the new World Heritage site, 64% did not know at all / 18% had already been to the German Wadden Sea / 2011: 7% of Germans named Wadden Sea as a WH site, in SH,HH,LS even 23%)
- Annual survey among inhabitants of the National Park region on knowledge about World Heritage status (2010: 21% named World Heritage certification, 38% did not know at all / 2011: 30% named the World Heritage certification)

Special survey after certification as World Heritage Site (Institut für Management und Tourismus / FH Westküste):

- survey about influence of World Heritage Status on the travel decision (ca. 15% of the respondents' travel decision are influenced by the World Heritage, 84,9% respondents were not influenced by that)

## 4.3 Research data on economic effects of tourism in the Wadden Sea Region

In **Germany** there are studies about economic impacts of tourism in protected areas, which are carried out according to a standardized method of Prof. Job. The collected and evaluated data is comparable with other protected areas in Germany. However, these studies are not carried out on a regular base.

In the **Netherlands** such research data is available on a national level, as well as (fragmented) on a regional level.

In **Denmark** this data exists for the whole destination

#### 4.4 Research data on environmental impact of tourism in the World Heritage area

A Wadden Sea-wide online survey among nature-protection operators has been carried out from May-June 2011 by the WWF evaluating opportunities and threats for the nature by tourism activities. Survey participants have been nature conservationists of the Wadden Sea protection from Germany, Denmark, the Netherlands, such as staff of protected area administrations, rangers, full-time- and voluntarily engaged in non-governmental Wadden Sea protection, scientists and private individuals from the Wadden Sea region. It includes proposals on how to avoid conflicts between the tourism activities and sensitive nature areas.

This research is not carried out on a regular base.

#### 4.5 Comparability of market research data

There is no comparability of data on transnational level, because the market researches focus on different source markets with different trends and customer behaviors, and the official statistics are based on different basic criteria.

#### 4.6 Existing research institutions / universities in the area that support the region's market research activities

In the **Netherlands** there are research institutions that can be subcontracted on a commercial basis as well as universities who are active in market research.

In **Germany** commercial market research institutions exist as well who are also doing basic tourism research annually. The research institute N.I.T. Kiel, for example, is located in Schleswig-Holstein, doing regular researches on tourism destinations and travel motivation, compiled in the "Reiseanalyse". The DWIF (Deutsches Wirtschaftswissenschaftliches Institut für Fremdenverkehr) is located outside the region, but is doing an annual research, published in a tourism barometer for Schleswig-Holstein (Sparkassenbarometer). The University of Applied Sciences Westküste is located in the area, supporting the region with specific studies and surveys.

The University of Southern **Denmark** has – until summer 2012 – a special tourism unit in Esbjerg, but this unit is being moved to Kolding, which is outside the Wadden Sea area. The museums in the area have means to carry out research in the local cultures in the area, but not to carry out market research.

## 5 Environmental Education

The **International Wadden Sea School** (IWSS) which is a well-established initiative of the trilateral cooperation, is an international information and service platform for environmental education and sustainable class trips in the Wadden Sea region. The IWSS coordinates the development of educational activities on the Wadden Sea World Heritage Site and offers flat-rate class trips. 19 visitor centres of the IWSS-network offer educational activities with a special focus on the international dimension of the Wadden Sea (e.g. “IWSS Wader Migration Game” or the “IWSS Role Play on Climate Change and Coastal Protection”)<sup>1</sup> ([www.iwss.org](http://www.iwss.org)).



A large variety of educational products have been developed jointly (in four languages) which is available for all 50 information centers in the Wadden Sea.

For example, the production of ‘five-products’-brochure (German, Dutch, Danish & English edition) and postcards in World Heritage design (to be used for guests, environmental education & information for multipliers).

The material is also available for teachers as download at the “Teachers’ Lounge”.

[http://www.iwss.org/fileadmin/user\\_upload/pdfs/IWSS\\_Material\\_Catalogue\\_web\\_teacher.pdf](http://www.iwss.org/fileadmin/user_upload/pdfs/IWSS_Material_Catalogue_web_teacher.pdf)

### 5.1 Existing environmental education programmes / concepts

#### 5.1.1 ... in the Netherlands

Various organisations (Waddenvereniging, National Parks, visitor centres, Natuurmonumenten, Syaatsbosbeheer, provincial Landscapes/Fryske Gea etc.) deliver a range of educational programmes at different levels.

10 visitor centres offer indoor & outdoor environmental education in the Netherlands.

#### 5.1.2 ... in Germany

Schleswig-Holstein and Niedersachsen are part of NUN (North German Partnership supporting the UN Decade Education for sustainable development 2005-2014), a network of ministries, education stakeholders & NGOs discussing and finding solutions for integrating sustainable development into education programmes.

Junior ranger programmes are in place in:

- the National Park Wadden Sea Schleswig-Holstein ([www.junior-ranger.de/nationalpark-wattenmeer-schleswig-holstein-unsere-naturlandschaft](http://www.junior-ranger.de/nationalpark-wattenmeer-schleswig-holstein-unsere-naturlandschaft))
- the National Park Wadden Sea Niedersachsen ([www.juniorranger-nds-wattenmeer.de](http://www.juniorranger-nds-wattenmeer.de))

<sup>1</sup> source: <http://www.waddensea-worldheritage.org/education.0.html> / [www.iwss.org](http://www.iwss.org)

- Biosphere Reserve "Wadden Sea Niedersachsen" ([www.junior-ranger.de/biosphaerenreservat-niedersaechsisches-wattenmeer-werde-junior-ranger](http://www.junior-ranger.de/biosphaerenreservat-niedersaechsisches-wattenmeer-werde-junior-ranger))

There are several ranger tours on offer, among them guided tidal flat walking tours through the National Park to the East Friesian islands and along the coast, boat excursions with catch of sea animals, explained by NP-Rangers or Nature NGOs.

36 national park visitor centres in Schleswig-Holstein and 16 visitor centres in Lower Saxony offer indoor & outdoor environmental education in the German Wadden Sea Region.

### 5.1.3 ... in Denmark

Depending on what is meant by environmental education programs, there are no overall programs of this kind. There are individual stakeholders – cp. above concerning the Nationalpark Vadehavet, The Wadden Sea Interpretation Forum and more – who provide information to the public about the Wadden Sea. There is at the moment no special focus on sustainable tourism aspects concerning the private tourism operators.

## 5.2 Existing education programmes on World Heritage Wadden Sea

The education programmes focusing on the World Heritage theme in the **Dutch Wadden Sea Region** are still very much in infant stage.

In **Lower Saxony** a lecture series "World Nature Heritage" was carried out in February 2010 with 600 participants. In addition to that an information folder of the lecture series has been produced and distributed.

New education tours focusing on the branded products "Big Five", "Small Five" and "Flying Five" have been developed in **Schleswig-Holstein**. Leaflets & postcards on these products are distributed to tourist information & national park centres. The visitor centre Multimar Wattforum created new education offers for school classes and special working papers on the World Heritage theme.

Furthermore sustainable school trips to the Wadden Sea >Schleswig-Holstein are organized by a tour operator from Hamburg.

Since the **Danish region** has yet not applied for becoming a World Heritage site, this topic has yet not been relevant in environmental education. However, the Nationalpark Vadehavet has a training program for kindergartens, public schools and a new initiative towards high schools etc. It can be found at the following home page: [www.mitvadehav.dk](http://www.mitvadehav.dk) (my Wadden Sea).

## 5.3 Training programmes for rangers and guides

In the **Netherlands** there are training programmes on offer by Natuurmonumenten, Staatsbosbeheer, provincial landscapes and the National Parks.

In **Lower Saxony** there is the special education project "quality management for nature-tourism products within the World Heritage Wadden Sea" 2011 – 2012 in place, which includes practical seminars on product development and concepts for guided tours to the World Heritage.

A similar education project “further education at the North Sea coast” 2010 – 2012 is running in **Schleswig-Holstein**, which includes seminars about the Five-products and an English course for Wadden Sea Guides.

In **Denmark** there is no Wadden Sea specific training program for rangers. There is a national program called “nature interpreters / nature guides (naturvejleder)” that is carried out by Forest & Landscape under University of Copenhagen and administered by the Danish Outdoor Council. The Nationalpark Wadden Sea has plans for training programs in cooperation with the other stakeholders.

#### 5.4 New concepts for environmental education, featuring the World Heritage Wadden Sea

In **Schleswig-Holstein** the following new environmental education concepts have started to be realized:

High Five for the Wadden Sea – on safari to the World Heritage”:

- “Big Five”, “Small Five” and “Flying Five” offers shall be internationalized
- National park centres shall offer special excursions, background information material and games on these topics
- New offers shall be developed: “Missing Five” (endangered animals) and “Moving Five” (dynamic structures, dunes, sea grass etc.)
- Distribution of brochures & postcards to all national park centres & to tourism companies
- Fact sheets and excursion-proposals are offered as files for free to all multipliers

Strandläufer publication by WWF:

- Will contain tideland Safaris, WHT & Five-products to bring the World Heritage topic to school classes

Joint WWF poster series & IWSS poster:

- New edition of poster series & IWSS poster shall contain the Wadden Sea Safari animals

New school programmes:

- Vision to integrate the theme Wadden Sea in the school curricula and to obligate school classes for 1 day excursions to the tideland
- Development of educational material about nature topics (within the PROWAD project by WWF) offered for teachers >> World Heritage Wadden Sea shall be focused at in 2012



## 6 Missing Links and gaps and recommendations

### 6.1 Marketing and communication

The inhabitants of the whole Wadden Sea Region inhabitants of the regions have little knowledge about the World Heritage status. In Denmark it seems very hard to sell a concept like sustainability when the tourism stakeholders specifically and the public in general do not understand the concept. The same goes for the World Heritage concept in Denmark. If it is not understood, the stakeholders cannot voice their support – and therefore it is easier and safe for them to voice resistance.

A transnational marketing cooperation is still in its infancy:

- A joint marketing plan exists, defining the goals of joint marketing campaigns, target groups, communication goals, measures, media & tools. The existing World Heritage Communication and Marketing Plan 2010 – 2013 should be further developed and extended.
- World Heritage product catalogue should be better communicated. Joint products should be developed, or exist ones (such as the five-products in Schleswig-Holstein) could be internationalized / used in other regions too.
- The Wadden Sea logo is not yet used consistently in all regions / on all important publications / online platforms / by all municipalities and tourist information offices.
- There is no joint approach towards foreign target groups that are of interest for the whole region,
- Potential synergies of cross-marketing and joint marketing are not used,
- No joint campaigns are carried out at specific markets,
- There is a lack of additional (regular) funding for joint marketing campaigns

#### 6.1.1 ... in the Netherlands

The potential of the World Heritage Status is basically not used to its full potential yet. There is no overarching marketing of the entire World Heritage site. Marketing is mainly done on a regional basis.

There is a lack of knowledge about the World Heritage among stakeholders. No World Heritage stakeholder forum exists yet.

#### 6.1.2 ... in Lower Saxony

There is a lack of cooperation between sectors and a lack of information about tourism activities and products, which causes difficulties combining and promoting the diverse tourism actions of the communities.

No branded products exist that “sell” the Wadden Sea World Heritage.

### 6.1.3 ... in Schleswig-Holstein

World Heritage products and marketing is currently only directed towards the domestic market and Danish target groups. The Dutch market is not in focus yet.

Marketing in sub-regions lacks funding (e.g. Dithmarschen)

## 6.2 Qualification & Quality

In both **German Wadden Sea regions** there is a lack of service quality and quality of supply: This challenge is being tackled by qualification projects and need to be continued.

In the **Netherlands** the standards are ok, but again not related to the World Heritage. Apart from the Lauwersmeer region, the mainland Wadden Sea tourism is underdeveloped. In the Netherlands “going to the Wadden Sea” generally does not mean that you spent time on the mainland near the Wadden Sea. The shore is mainly perceived as hub for activities on the Wadden Sea itself, or going to the islands

On the **trilateral level** there is no joint standard for eco label systems and public private partnership schemes in place. Only the regions in Germany have PPP-schemes (National Park partnership) in place, but again with different eco-labels behind. The eco-labels that are in use in all countries are having different criteria and focuses. Still many accommodation providers have not joined any eco-label systems.

Training courses on sustainable tourism and World Heritage need to be further developed, including training on visitor management tools, concept of sustainable tourism, communication of World Heritage, carrying capacity, quality standards & eco-labels, nature interpretation and visitor guidance on World Heritage as well as language courses.

## 6.3 Infrastructure & Investment

A first step toward a joint trilateral visitor guidance system has been done with the WH information columns using the same Corporate Design and information contents. The potential for cross-marketing the highlights of the whole Wadden Sea region are not utilized yet.

Visitor Centres need to be updated with information and interactive offers on the World Heritage Wadden Sea. First steps are taken and need to be continued.

A sustainable transport infrastructure in order to travel along the mainland Wadden Sea coastline is under-developed, bus and regional train connections are not sufficient everywhere. Currently travel between the islands is limited (in terms of frequency, capacity or season), although there is a potential for island hopping. Sustainable transport connections need to be improved in all regions, which include a better accessibility to the Wadden Sea Region by train, an enhancement of inner-regional mobility within the Wadden Sea Region by public transport and the improvement of communication of public transport offers to the tourism stakeholders and their guests. There is a need for a better cooperation with the public transport companies of all regions.

## 6.4 Market Research

There are different bases for tourism statistics in all three countries, which are not comparable. An overarching approach is missing. The market research, which is already undertaken, is fragmented (e.g. just for one island, one region, one specific topic etc.) and a structural approach is missing.

Furthermore there is no comparability of the ongoing market researches on target groups and markets, because the focus of each region is laid on different source markets with different trends & customer behaviors.

No standardized regular survey with topics of joint interest covers the whole Wadden Sea area.

Moreover there is a lack of specific knowledge of foreign (neighbouring) markets concerning the nature tourism segment (e.g. target group's motivations & behaviors & market potentials of Danish, German and Dutch nature tourists).

Finally there is a lack of market knowledge about further international markets beyond neighboring countries that have a potential for visiting World Heritage Sites.

## 6.5 Environmental Education

The environmental education offers are generally very good, visitor centres are well-established, playing an important role in nature interpretation, and the cooperation with schools works well.

However, the World Heritage theme is yet not integrated in all education offers & visitor centres. Exhibitions, interactive games & school programmes need to be further developed in different languages

The World Heritage theme needs to be better integrated in IWSS (International Wadden Sea School) and spread to all information centres.

There is no joint education material existing on the World Heritage theme that could be used at all schools, introducing the whole Wadden Sea Region to them.

The World Heritage is not a topic yet in school lessons. It needs to be integrated in curricula and lectures. Excursions to the World Heritage should become a regular part of the school lessons.

## 7 Future Directions

By sharing what the Wadden Sea has to offer through authentic, interesting and quality tourism 'products' that encourage discovery, visitors will have the opportunity to experience the best quality natural habitats, iconic species and wild and remote sea/landscapes as well as a rare chance to connect with nature.

There is a unique opportunity, and responsibility, for everyone across the entire Wadden Sea to work together to create an understanding of what the area can offer and how that can be developed, managed and marketed. Reducing the damaging effects of mass tourism or overuse and with a combination of visitor management, environmental education and political influence, a new strategic direction for sustainable tourism will emerge.

Through increased trans-national working, quality management using the Wadden Sea World Heritage as the overarching brand there are some early ideas emerging for discussion as possible future directions:

1. An agreed set of core principles for tourism activities throughout the Wadden Sea
2. Using the World Heritage status as a 'brand' for businesses, public bodies and communities
3. Raising the profile and identity of the Wadden Sea through an awareness programme to external audiences/markets
4. Building pride to internal audiences/residents of the significance of World Heritage status, pride in its existence and a determination to protect its qualities including using the Wadden Sea World Heritage theme in local schools and all visitor/information centres
5. Adopting the highest standards of management for tourism
6. Working across national boundaries use the World Heritage status to develop a coordinated approach to tourism delivery across the whole site, including an integrated service for visitors covering information, interpretation, transport, products and accommodation
7. Playing an active role on the international stage through the World Heritage system