

Some observations on tourism development in the Dutch Wadden Sea area

Hans Revier¹, Albert Postma², Akke Folmer³

Stenden University of Applied Sciences

PO Box 1298, 8900 CC Leeuwarden, the Netherlands

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Abstract

Tourism has become one of the important economic activities in the Dutch Wadden Sea area. The tranquillity, open space, the natural qualities and cultural inheritance of the area attract every year between 1 and 2 million visitors. Especially the islands are a popular holiday destination. Tourism development on the coastal mainland, however, is lacking behind. It can hardly profit from the visitor streams to the islands. Biking, hiking and a visit to the spacious beaches of the islands are the most popular activities. The authentic atmosphere and the landscapes of the islands are appreciated the most. From a survey among participants in nature excursions it appeared that experiencing wildlife of the Wadden Sea is the most important factor in shaping visitors' attachment to the area.

In general the nomination of the Wadden Sea as a natural World Heritage site is considered to be an important incentive for tourism development. From our surveys it became apparent that, in contrary to the German coastal areas, the WHS is relatively unknown and different stakeholders, like entrepreneurs, don't take any initiative that could benefit from the listing.

To give a sustainable boost to the Wadden area as a tourism destination requires a clear and focused vision and strategy that is supported by the residents and the various tourism stakeholders. Encouraged by the Worldheritage status of the Wadden area and the expected permission to extend the airport in Groningen

¹ Stenden University, research group Marine Wetlands Studies, supported by the Dutch Wadden Sea Society (www.waddenvereniging.nl)

² Stenden University, European Tourism Futures Institute (www.etfi.eu)

³ Stenden University, research group Marine Wetlands Studies

directions were developed for the development of the North-Netherlands as international tourism destinations with the help of scenario planning.

The Wadden Sea Area

The international Wadden Sea is an estuarine tidal area along the North Sea coasts of The Netherlands, Germany and Denmark. It is characteristic for regions with sandy coasts and a medium tidal range. Fifty barrier islands separate the Wadden Sea from the North Sea, and an offshore transition zone to the North Sea. The tidal flats of the Wadden Sea form the largest unbroken stretch of mudflats worldwide. The present form of the Wadden Sea is still mainly the result of natural forces, although since the Middle Ages man has changed the Wadden Sea landscape by building dykes and reclaiming land (Schroor, 2008). The Wadden Sea is an important nursery area for fish, a foraging and resting habitat for seals, and a foraging habitat for migrating waders. The Wadden Sea is a fully nature protected area within the relevant national protection schemes. The Wadden Sea and large parts of the islands are designated as Natura2000 area and listed as natural World Heritage area (Common Wadden Sea Secretariat, 2008). The landscapes of the adjacent coastal areas of Noord-Holland, Friesland en Groningen are a result of a long and intense interaction between its inhabitants and the sea. In this peripheral rural area agricultural activities dominate although some industry is developed near the ports of the cities of Den Helder, Harlingen en Delfzijl (Schroor, 2008). The area has a rich cultural inheritance, reflecting the struggle of mankind against the forces of nature.

Development of tourism

Already in the 19th century tourism developed on the Wadden Sea Islands. On the German Island Nordeney the first 'bathing' hotel was built in 1797, following a trend developed in the UK. Later on other islands followed. After World War 2 mass tourism started to develop. Attracted by the spacious beaches and the characteristic culture on the islands the amount of tourists grew rapidly in the fifties and sixties (Raad voor de Wadden, 2009). Nowadays the islands have developed into very popular holiday destinations. Since 1996 the Toerdata Noord monitoring system of Stenden University monitors and analyses the supply and demand of the tourism industry in the northern part of the Netherlands (Huig & de Haas, 2010b). From these data some conclusions can be drawn about the importance of tourism in the Dutch

Wadden Sea area. In 2010 1,2 million visitors spent 5,1 million nights on the Wadden islands. Tourists in the Waddenarea arrive mainly from the Netherlands (83% visitors; 76% nights), Germany (14%; 22%) and Belgium (1,5%; 1,2%). The number of nights spent on the islands by Dutch tourists during the period 1998-2009 was approximately four million each year, varying between 3,7 million and 4,2 million (Sijtsma, in prep). As a result traditional economic activities as agriculture and fisheries are replaced by tourism related activities (Fischer & Waterbolk, 2005). The existing dominant pattern of visitation is a short (weekend to full week) stay in a rented cottage, hotel or camping site. Most of the money spent during visits appears to be on lodging, board and transport (both to the islands as well as on the islands) (Stichting Recreatie, 2003).

Tourism development at the mainland is far less developed. Visitors spent about 1 million nights each year. The ferry ports Den Helder, Harlingen, Holwerd and Lauwersoog hardly benefit from visitor streams that cross the Wadden Sea to the islands. Striking is the lack of mobility between the islands and cities on the mainland (Moufakkir & Revier, 2009). From several surveys, conducted by groups of Tourism Management students of Stenden University, it appears that there is no great deal of interest among the ferry passengers to spend some time on the mainland during their holiday. For instance 87% of the travellers to Terschelling and Vlieland (n=152) is only interested in the islands. Also 65% of the interviewed people in Den Helder (n=172) indicate that their sole reason to visit this part of the Wadden Sea area is the ferry to the island of Texel.

Motives

Every five years Toerdata Noord (Huig & de Haas 2010a) organises a survey among tourists in the Northern provinces to assess their behaviour and appreciation of their stay. These data indicate that walking (26%), cycling (25%), swimming or bathing (14%) are the most popular activities during a holiday on the islands. The last decade participation in nature excursions and seal- and shrimp tours grew in popularity. Not too much research has been done into the motives of the tourist in the Wadden area. In 1993 a small survey indicated that most of the visitors highly appreciate the pristine landscape and the natural values but overall conclusions have not been drawn (Stichting Recreatie, 2003). In 2008 the Waddenfederatie (de Rijk & Borger, 2008), a cooperation of the tourist boards on the islands, published the results of a

broad inquiry. This report confirms the findings of the research in 1993. Most of the visitors appreciate the tranquillity, the nature and the landscape of the islands. Recently the University of Groningen developed the Hotspotmonitor to analyse the appreciation of the different natural parts of the Wadden Sea area (Sijtsma, in prep). This webbased monitoring device asks respondents to state which natural areas they find highly attractive and mark this place on a map (www.hotspotmonitor.eu). The natural landscapes on the islands (beaches and dune areas) are appreciated the most. The Wadden Sea itself is less appreciated. Nevertheless the natural values of the Wadden Sea are of importance for tourism development in the area. During the summer and autumn of 2011, a survey took place among participants of nature excursions in the Wadden Sea area (Folmer, 2012). Results demonstrate that compared to other elements of the natural environment, wildlife is the most important factor in shaping visitors' attachment to the Wadden Sea area. Memorable wildlife experiences and visitor's motivation to see wildlife contribute most to place attachment to the Wadden Sea, followed by the level of interest in observing birds and small marine wildlife and an interest in hearing birds sing, experiencing variations in seasons and enjoying nature waking up. Other factors that contribute to attachment to the Wadden Sea area are longer stays and more repeat visits of visitors. These outcomes indicate that nature excursions can be important tools in 'slow' marketing, as visitors get the opportunity to experience small marine wildlife, birds and seals during these excursions. Furthermore, a higher level of attachment to the Wadden Sea area is related to more repeat visits and longer lengths of stay, leading to more revenues for nature and tourist organisations.

World Heritage

Already in the early nineties the possibility of nominating the Wadden Sea as World Heritage site is discussed in the trilateral cooperation. But at the first proposals meet a lot of criticism. Economic interest groups fear legal constraints to their activities, local communities are afraid for a loss of autonomy and environmental NGO's doubt the added value of the nomination (Van der Aa, 2004). Despite this criticism the three governments decide to start the nomination process in 2005. During an intensive consultation-process the resistance of the different stakeholders changes into support. Two main causes can be determined for this change in opinion. First the formal agreement between the different governmental bodies responsible for the

protection of the Wadden Sea not to derive any new formal regulation from the World Heritage status. And secondly a study from the Dutch UNESCO Centre predicting an increase in tourism and therefore economic benefits in the area (UNESCO Centre Nederland, 2005). The World Heritage Status of the Wadden Sea, as decided upon by the World Heritage Committee of Unesco on 26th of June 2009 in Sevilla is in the end supported by every stakeholder in the Dutch and German Wadden Sea. Naturally this decision of UNESCO is welcomed during the 11th Ministerial conference on Sylt (Common Wadden Sea Secretariat, 2010). The Ministers decide to initiate and organize the development of an overall Sustainable Tourism Development Strategy for the Wadden Sea World Heritage Site, and as a first step to adopt a Wadden Sea Communication and Marketing Programme. Economic effects from the World Heritage status, and more specific the economic effects deriving from tourism, are difficult to measure. Increases in tourism have been reported in association with the process of WHS listing. Sometimes an increase in visits is associated with areas where the nomination was considered more or less controversial (Buckley, 2004). Nomination of the Dutch-German Wadden Sea was considered to be a bit controversial in a sense that the Danish government withdrew its political support for nomination as did the government of Hamburg. An increase in visitation to the Wadden Sea during the (short) period of controversy preceding the actual nomination has not been determined (Revier, 2011).

To get more insight into the effects of the World Heritage status of the Wadden Sea quantitative and qualitative research among stakeholders and visitors of the Wadden Sea in the fall of 2008 and the spring of 2009 was carried out. Visitors to the harbour city Harlingen in the Netherlands were asked about their knowledge and expectations of the World Heritage nomination of the Wadden Sea. Also stakeholders in the Dutch and German Wadden Sea (representatives of the municipalities, restaurant-owners, entrepreneurs) were questioned. The main results of these studies are: 85% knows World Heritage sites, but only 30% is aware of the Wadden Sea listing. A small majority (53%) considers the World Heritage status as a reason to (re)visit the area. Due to the nomination stakeholders expect an increase of tourism and a positive added value to the image of the Wadden Sea. At the other hand stakeholders are not well prepared and are waiting for initiatives by the (local)

government. Possible marketing opportunities have not been taken into consideration from most of the tourist facilities and municipalities as well (Revier, 2011).

Germany

All this in contrary to Germany where the World Heritage status actively is used in promoting tourism in the coastal areas of Lower Saxony (Prowad, 2012). A logo has been developed, which can be found on all brochures, the homepages and everything else connected with the German side of the Wadden Sea. Moreover, on the German motorways heading towards the coast signs are installed, which raise the awareness of the special site. Furthermore package tours themed around the topic of the Wadden Sea are offered (Nordsee GmbH, 2011). Also qualitative research in the small harbour village Nessmersiel (Lower Saxony) indicates the potential value of the World Heritage Status of the Wadden Sea. From interviews with representatives of the tourist boards and the administration of the National Park (Nationalparkverwaltung Niedersachsiches Wattenmeer) it appeared that in this region of the Wadden Sea the WHS is actively used to attract people. After the designation the interest from tourists increased and more people are willing to spend their holidays at the region. The marketing of the region mainly uses the World Heritage title and programmes are developed to raise the awareness and to educate the visitors. The nomination as UNESCO World Natural Heritage Site creates benefits for tourism and hence the region is present at fairs and started an image campaign. The WHS has lead to a raising awareness for the preservation the natural values of the Wadden Sea. Moreover, a stronger focus on a nature orientated target groups is developed. Also cooperation between the different stakeholders benefits from the WHS.

The future

To give a sustainable boost to the Wadden area as a tourism destination requires a clear and focused vision and strategy that is supported by the residents and the various tourism stakeholders. The UNESCO status of the Wadden area is not a label that will attract more tourists automatically. Research shows that the UNESCO status can have all kinds of benefits for the region in question, such as conservation, cooperation, local pride, social capital, learning & education, and sponsoring & investments, but the economic effects and tourism impacts usually remain poor

(DCMS UK Government, 2008; Rebanks Consulting LTd & Trends Business Research, 2009). So the UNESCO status has to be regarded as an interesting and challenging opportunity for the region but not as a panacea. Another opportunity is the permission that is given to Airport Groningen Eelde to extend its airstrip. This will open the doors to low cost carriers to bring tourists to the North of the country. Contracts were already signed with Ryanair to fly on Palma de Mallorca, Marseille and Milano/Bergamo, but plans to fly to Spain and Scotland in the future are considered as well. This development is not only interesting for Dutch traveling abroad but could mean an interesting opportunity to attract Europeans from urban areas to the 'undiscovered' Wadden area.

To develop a focused vision and strategy and to exploit the opportunity of the UNESCO label and the growth of Airport Groningen Eelde is a challenging task in today's tourism environment. Affected by globalization processes and the development of information technology the world has gradually changed into a network and information society. Increasingly consumers base their decisions on what happens in the world around them and on opinions of their network of 'friends, fans and followers' with whom they stay in touch through the social media. Thus, consumers' tastes and preferences change with an enormous pace, and trends come and go. Decisions are taken last minute, affected by what Zoover and Tripadvisor tell them and what the business communicates with them via promotions (such as Groupon, Four Square) , and auction sites. The behavior of consumers cannot be predicted anymore on the basis of the education and their income. Consumers want to try and taste from different 'leisure styles', and this is unpredictable.

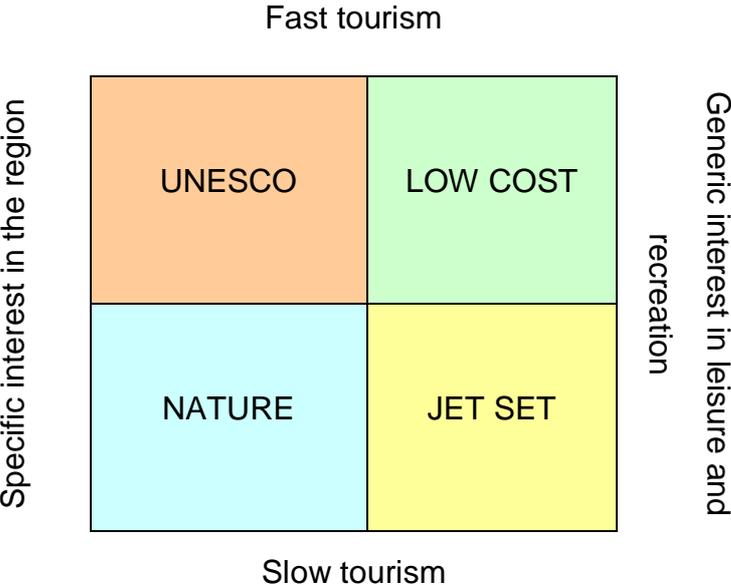
In order to attract the tourist to the Wadden area traditional approaches to destination marketing do not seem effective anymore and simply reacting to trends is not sufficient. Alternatively, it is important to identify the driving forces that affect consumer behavior in the future, especially the ones we feel very uncertain about. By trying to understand such forces and the possible directions they might take, we are able to anticipate changes in the environment and how the consumers react to it. This gives more confidence and makes the business less vulnerable to what might happen.

Scenario planning is an instrument that takes such thinking into account. The knowledge, expertise and uncertainties of stakeholders are shared and discussed. The most important uncertainties for the long term are identified in a joint effort and with the help of a creative process scenarios are created and elaborated. Scenario's are not predictions or forecasts, but they are qualitative pictures of how the world might look like after some years. Scenario's crafted in this way do not have the intention to be labeled as a best, neutral or worst case scenario, but they act as a framework for inspiration that can help organizations to develop a vision, strategy or new concepts or business models in a pro-active way. Visit Scotland was one of the first tourist organizations to apply this way of working successfully. The success of Visit Scotland has inspired the tourism business in the North-Netherlands and Stenden university to establish a center of expertise in the field of futures studies and scenario planning in leisure and tourism, called European Tourism Futures Institute (ETFI) (Postma, 2012).

Encouraged by the UNESCO status of the Wadden area since 2009 and the then expected permission to extend the airport in Groningen, the Chamber of Commerce in the North-Netherlands commissioned the ETFI to develop directions for the development of the North-Netherlands as international tourism destinations with the help of scenario planning. The ETFI has identified two major uncertainties for this development. One uncertainty is whether the North has to focus on international tourists that are attracted by specific characteristics of the region or at tourists that come for leisure and recreation activities that they could also do in other regions. The other uncertainty is whether the region has to focus on 'slow tourism' or on the opposite that was called 'fast tourism'. As a result four plausible so called target scenario's were created: the UNESCO scenario where tourists come for the specific characteristics of the region, but they might come from far and they stay only shortly as they have to travel on to other interesting places in Europe they want to see. The NATURE scenario that combines specific interest in the region with slow tourism. The LOW COST scenario that links fast tourism to generic interest in leisure and recreation. And finally a JET SET scenario that combines slow tourism with a generic leisure and tourism interest. The four scenario's have been elaborated with reference to demographic, economic, socio-cultural, technological, ecological and political trends and developments that might have different effects in each of the scenario's.

Together with an extensive market and product analysis for each of the scenarios opportunities and threats have been identified for each of the scenarios supporting further elaboration. Thus four different storylines have been created, each with specific product-market-combinations organized according to themed itineraries for international tourists that should inspire the business to be developed. At the moment of writing the project is halfway and will be finished by the end of June 2012.

Figure 1:
Four scenarios for North-Netherlands as international tourism destination



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