

Interreg Vb, North Sea Region

Prowad Link project

Desk research: Market Trends – Nature as a Driver for Sustainable Tourism and Local  
Development, 2019

06.02.2019

## Background

Interreg Vb, North Sea Region, project PROWAD LINK was approved end of June 2018. The 14 partners in the project from Norfolk (UK), Geiranger (Norway) and Wadden Sea (Denmark, Germany, Netherlands) are working on 6 work packages, where work package 6 (WP6) focus on development of sustainable tourism and experiences with nature as a driver for development. The project uses the NBBC-model (Nature Based Benefit Cycle), where sustainable development - economic, socio-cultural and nature-environmental viability – is a premise. Amongst the partners are national parks, world heritage nature sites and other special nature sites, so protection and prosper must go hand in hand.

To qualify the co-creation work with developing new sustainable tourism products, experiences and services a desk research is needed to show the trends in the markets for nature based tourism. The desk research shall contribute to the projects priorities in the development process according to marketing and innovation / product development.

A desk research can be defined as a collection and preparation of available, existing knowledge in a structured and systematic way.

Markets are traditionally thought of as a specific geographical place. The meaning of market is here expanded to include suppliers, buyers and competitors, and not only in a geographical sense, but also digital markets is included, e.g. Facebook have 1.9 billion users and Instagram have 1 billion users.

## Aim

The aim of the desk research is to collect relevant knowledge such as analysis, reports and studies about international market trends in nature based tourism.

The collected knowledge must be structured and prepared into a usable and available report with limited 'lyrics' and text. Instead a more visual form with e.g. graphs, illustrations and tables is demanded.

The desk research will be used to inspire SME's (Small, Medium Enterprises) to develop updated, modern sustainable nature based tourism products and experiences, e.g. tour packages, tour fact sheets, videos, routes, guides etc., and furthermore it will also contribute to produce the right marketing activities. The products envisage adding to UN's 17 sustainable development goals.

## Methods and activities

The search for knowledge about market trends for sustainable nature based tourism will only include updated literature, which is relevant to predict near future market trends.

Material could include reports from UNWTO, WTTC, EU, EIU, UNESCO as well as tourism organisations and associations, public authorities, universities and private knowledge providers.

It is of importance that the identified knowledge focuses on applied literature and not so much on science studies and popular articles.

The report could include market information about political, economic, social, technological, environmental and legal trends.

It is expected that the report covers:

- Trends in international tourism
- Trends in international nature based tourism
- Trends in demand for sustainable tourism and world heritage, national parks and other special nature areas
- Trends in mass tourism negative effect on travel destinations
- Trends in tourism in the North Sea Region
- Trends in cold water tourism.
- Trends in SoMe

If possible the report could also include market trends in special interest tourism, which traditionally takes place in special nature sites such as:

- Nature guided tours
- Fishing tourism
- Cycling tourism
- Bird watching tourism
- Kayaking tourism
- Walking / hiking tourism
- Local (ecological) food tourism
- Other considerate tourism themes
- Cultural / local heritage

The screening of literature will provide information about competitors in the mentioned fields as well as information, which can be used for product development and marketing of new products from the partner regions to specific markets.

Traditionally most tourists in the regions come from domestic markets and neighboring markets. But because of the presence of world heritage and outstanding nature also other tourists from other markets could be attracted.

Partners in the project extract data from regional surveys and studies and report to the consultant at a workshop facilitated by the consultant.

The outcome of this workshop focuses on whether there is a gap between demand and present supply in the regions. The study should therefore also cover trends in tourist's expectation related to trends listed above and advice on how to bridge the gap.

The preparation, structure and form of the report / study will be agreed in cooperation between Wadden Sea National Park, Denmark and the external consultant.

The timelines for the study indicates is not very long and this will of course set a limit to the level of details and information which can be collected and included in the report.

Important is that the report can be used by the partners and results are applicable as well as it has to be easily understood and used by local SME's in the partner regions, when they read it. The report includes a summary/ extract that can be used as a lite version for introduction to local SME's.

The report is written in English.

## Time

<b>Activity</b>	<b>Date</b>
Tender	06 February 2019
Contract	25 March 2019
Initial workshop with WP 6.1 project partners to identify trends/ extract results from national market analysis facilitated by external consultant	May 2019
Literature search	April-June 2019
Report 1. draft	10 June 2019
Deadline for comments from partners to report	17 June 2019
Meeting between external consultant and lead entity (and possibly CWSS)	24 June 2019
Final report	9 August 2019
External consultant present report	August-September 2019
Project period end	30 September 2019

Please see tender specifications for detailed information about conditions for this specifications of requirements.

Please notice that the invoice shall be split and forwarded to three partners, cf. contract item 6.2.