The relevance of Ecotourism in the Danube region
- Latest trends and challenges

Conference ‘Green Competences for Ecotourism in the Danube region’
- Comana, 8th June 2015

Christian Baumgartner
response & ability
Eco or Sustainable – what are we talking about?

Trends and Demands - Examples of sustainable ecotourism at the Danube

Some figures

Challenges (not only) for education
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Trends and Demands - Examples of sustainable ecotourism at the Danube

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Challenges (not only) for education
Ecotourism Definition – The Original

“Tourism to protected nature or at least natural areas.”

Ecotourism Society (1965)
Is this ecotourism?
Visitor centre in a Polish National park.
Sustainable Tourism

- Economic prosperity
- Needs of the next generation
- Needs of the guests
- Cultural resources
- Natural resources
- Subjective wellbeing of inhabitants and staff
Open-minded for culture and contacts to locals

Local food inside

Eco-friendly activities

Time does not play a role

Key for bed & breakfast

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DEFINITION OF SUSTAINABLE ECO-TOURISM

“Sustainable Eco-tourism conserves nature and landscape, offers nature-related activities and promotes the local culture and economy of the destination.”
Eco or Sustainable – what are we talking about?

**Trends and Demands - Examples of sustainable ecotourism at the Danube**

Some figures

Challenges (not only) for education

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Trend 1:
Tourism in protected areas
Discovering a water world
Nature discovery with the whole family
Children and youth camps
Do it yourself scientists
Trend 2: Active holidays in nature
Project: DanubeHike
- The Upper Austrian Danube Trail
Project: DanubeHike
- The Lower Austrian World Heritage Trail
The Danube cycling route in SEE
<table>
<thead>
<tr>
<th>Cruise tourists</th>
<th>Cycling tourists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreign tour operator / boat owner</td>
<td><strong>Economy</strong> Local agency</td>
</tr>
<tr>
<td>-</td>
<td>Hotel, accommodation</td>
</tr>
<tr>
<td>-</td>
<td>Restaurant</td>
</tr>
<tr>
<td>Souvenirs brought on the boat (often not regionally produced)</td>
<td>Local / regional souvenirs</td>
</tr>
<tr>
<td>Guides (sometimes)</td>
<td>Guides</td>
</tr>
<tr>
<td>+/- env. friendly</td>
<td><strong>Ecology</strong> Very env. friendly</td>
</tr>
<tr>
<td>No contacts with locals</td>
<td><strong>Culture</strong> Many contacts with locals</td>
</tr>
<tr>
<td>Some Data ...</td>
<td>Hikers</td>
</tr>
<tr>
<td>---------------</td>
<td>--------</td>
</tr>
<tr>
<td>Demograph. Data</td>
<td>Average age: 48y (DE) Single men, families, small groups, few package tours</td>
</tr>
<tr>
<td>Accommodation</td>
<td>***-hotels preferred, farm-stays, B&amp;B 30-40% search for family atmosphere, regional cuisine</td>
</tr>
<tr>
<td>Numbers</td>
<td>DE: 55% of population, 20% also in winter; 33% do one (or more) hiking holidays/a</td>
</tr>
<tr>
<td>Expenditures</td>
<td>DE: &gt; than cyclists</td>
</tr>
<tr>
<td>Sources</td>
<td>Hiking-Study 2010 (<a href="http://www.wanderforschung.de">www.wanderforschung.de</a>)</td>
</tr>
</tbody>
</table>
Trend 3: Regionality and Authenticity

SOUL FOOD SERBIA
Eco or Sustainable – what are we talking about?

Trends and Demands - Examples of sustainable ecotourism at the Danube

Some figures

Challenges (not only) for education

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DEMAND FOR NATURE
(TRAVEL MOTIVE 'TO BE IN NATURE'; % OF TRAVELLERS)

DECISIONS FOR THE HOLIDAY DESTINATION

**Demand for Sustainability during the Holidays – German Population, >14 y**

My holiday should be ecologically sound, saving resources and environmentally friendly as far as possible.

- 15 agree totally
- 27 agree not at all

My holidays should be socially sound as far as possible.

- 20 agree totally
- 29 agree not at all

Source: Deutsche Reiseanalyse (German Travel Monitor); 2012-2015
Nature-related Holidays

- 54% of population define 'experience of nature' as a 'very important' motive
- 29% of all travels 5+ days; 7% of travels 2-4 days
- Daily expenditure / person (incl. transport): 74,- € / 72,- €

Germans

Hungarians

- 54% of population choose destination conc. 'landscape and nature'
- Daily expenditure / person (incl. transport): 75,- €
# Types of nature tourists

<table>
<thead>
<tr>
<th>Type</th>
<th>Main interest</th>
<th>Importance of intact nature</th>
<th>Demands on guides</th>
<th>Standards of comfort</th>
<th>Quantitative demand potential</th>
</tr>
</thead>
<tbody>
<tr>
<td>The &quot;committed nature tourist&quot;</td>
<td>experiencing nature, special interests</td>
<td>very important</td>
<td>special knowledge of ecology</td>
<td>low</td>
<td>low</td>
</tr>
<tr>
<td>The &quot;interested nature tourist&quot;</td>
<td>experiencing nature, ecological inter-relationships</td>
<td>important</td>
<td>good knowledge of ecology</td>
<td>low to high</td>
<td>moderate</td>
</tr>
<tr>
<td>The &quot;casual nature tourist&quot;</td>
<td>easily accessible/&quot;obvious&quot; nature attractions</td>
<td>less important</td>
<td>unspecific knowledge of ecology</td>
<td>moderate to high</td>
<td>high</td>
</tr>
<tr>
<td>The sports/adventure tourist</td>
<td>focus on activities</td>
<td>nature as a backdrop</td>
<td>area and technical knowledge</td>
<td>low</td>
<td>moderate to high (diving)</td>
</tr>
<tr>
<td>The hunting/fishing tourist</td>
<td>focus on activities</td>
<td>nature as a backdrop</td>
<td>area and technical knowledge</td>
<td>low</td>
<td>low</td>
</tr>
<tr>
<td>The nature tourist with cultural interests</td>
<td>natural and cultural experience</td>
<td>important</td>
<td>good ecological and very good cultural knowledge</td>
<td>low</td>
<td>moderate</td>
</tr>
</tbody>
</table>

Strasdas: The Eco-Tourism Training Manual for Protected-area Managers, 2002
<table>
<thead>
<tr>
<th>Creative Class</th>
<th>Millennials</th>
<th>LOHAS</th>
<th>Golden Generation</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Higher service demand</td>
<td>• Born in the 80ies</td>
<td>• Hybrid lifestyle: health and enjoyment</td>
<td>• Represent the social majority in the future: time rich, money rich!</td>
</tr>
<tr>
<td>• Luxury-oriented</td>
<td>• Post-TV generation</td>
<td>• Awareness of sustainability</td>
<td>• Experienced – but not experienced consumers</td>
</tr>
<tr>
<td>• Technology-affine</td>
<td>• Technology-affine and very connected</td>
<td>• Technology-affine</td>
<td>• Sophisticated and interested</td>
</tr>
<tr>
<td>• Self-employed</td>
<td>• Digital lifestyle</td>
<td>• Conscious of internal values and optimistic</td>
<td>• No senior citizens resorts</td>
</tr>
<tr>
<td>• Small entrepreneurs</td>
<td>• Very health conscious</td>
<td>• Green lifestyle</td>
<td>• Communication and service is important</td>
</tr>
<tr>
<td>• High-skill worker</td>
<td>• Part of the trend ‘new middle class’</td>
<td>• Spiritually oriented</td>
<td>• Guide to sustainable tourism in Protected Areas, <a href="http://www.parksandbenefit.net">www.parksandbenefit.net</a></td>
</tr>
</tbody>
</table>
PREPAREDNESS TO PAY MORE FOR ECOLOGICAL AND SOCIALLY SOUND PRODUCTS

Percentage of total tourists

Ready to pay up to x% more
PREPAREDNESS TO PAY MORE FOR ECOLOGICAL AND sociaLy Sound PRODUCTS
Eco or Sustainable – what are we talking about?

Trends and Demands - Examples of sustainable ecotourism at the Danube

Some figures

Challenges (not only) for education
Visitor Management and Monitoring
Zoning
- Honey Spots
- Roads and paths
- Tourist routes
- Barriers and site hardening
- Levies
- Restrictions
- Information and interpretation
- Permits
- Codes of conduct
Guide to sustainable tourism in Protected Areas,
www.parksandbenefit.net
Monitoring is the systematic and regular observation of a place or destination, in qualitative (non-numerical) and quantitative (numerical) terms.
<table>
<thead>
<tr>
<th>Type</th>
<th>Example</th>
<th>Benefits</th>
<th>Drawbacks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-registration</td>
<td>Guest book entries</td>
<td>Cost-effective</td>
<td>Could be inaccurate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Participative</td>
<td></td>
</tr>
<tr>
<td>Visitor registration form</td>
<td>Accommodation providers note key details</td>
<td>Cost-effective</td>
<td>Only covers overnight stays</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Accurate</td>
<td></td>
</tr>
<tr>
<td>Visitor survey</td>
<td>Face-to-face survey</td>
<td>Accurate</td>
<td>Costly in time and labour</td>
</tr>
<tr>
<td>Remote sensing and traffic</td>
<td>Automated counting devices using infrared</td>
<td>Accurate</td>
<td>Technical (could break down); costly</td>
</tr>
<tr>
<td>counting</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visitor survey – self-completion</td>
<td>Survey forms left in weather-proof boxes at key points</td>
<td>Cost-effective</td>
<td>Vulnerable to damage by weather and people</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interviews</td>
<td>One-to-one interviews</td>
<td>Accurate and give</td>
<td>Costly in time and labour</td>
</tr>
<tr>
<td></td>
<td></td>
<td>possibility to ask follow-up questions</td>
<td></td>
</tr>
<tr>
<td>Internet survey</td>
<td>Online survey tools</td>
<td>Can be free and accessible to many</td>
<td>Could potentially be falsified</td>
</tr>
<tr>
<td>Focus group discussion</td>
<td>A small sample group is brought together to</td>
<td>Accurate and open – good depth of</td>
<td>Wrong group could make results unrepresentative</td>
</tr>
<tr>
<td></td>
<td>discuss issue</td>
<td>information revealed</td>
<td></td>
</tr>
</tbody>
</table>

EUROPARC Federation; Practical, profitable, protected. A starter guide to developing sustainable tourism in protected areas, 2012
- Visitor Management and Monitoring
- Product development
(Guided) Bog walking with special footwear

Store Mosse NP, Sweden
Experience „Mud between the toes and grass in the ear”
E.g. Winter hiking
- Visitor Management and Monitoring
- Product development
- Accessibility

Barrier-free access in accommodation AND to activities
- Visitor Management and Monitoring
- Product development
- **Accessibility**

Public Transport and Soft Mobility to AND within the destination
- Visitor Management and Monitoring
- Product development
- Accessibility
- Environmental performance of tourism in general
Visitor Management and Monitoring
Product development
Accessibility
Environmental performance of tourism in general
Working conditions
Visitor Management and Monitoring
Product development
Accessibility
Environmental performance of tourism in general
Working conditions
Cooperation and Partizipation
Visitor Management and Monitoring
Product development
Accessibility
Environmental performance of tourism in general
Working conditions
Cooperation and Participation
Awareness Raising
... understand and actively live a multi-stakeholder approach

... involve all stakeholders with **effective communication** in order to jointly plan, manage, market and monitor biodiversity based tourism products.

... define properly those natural areas to be used and monitor their **capacity limits** in order not to damage habitats and species.

... understand ecological and sustainable management of accommodation, the whole service chain and the destinations.

... develop intensive, distinctive and **creative products** and campaigns, raising the public (local !!) and international community (guests !!) **awareness** for biodiversity and sustainability. This should go hand in hand with with the development and maintenance of appropriate physical infrastructures and operations for adequate sustainable tourism activities.

... involve all local suppliers and stakeholders in product development and continuous training programmes – including subjects such as biodiversity, conservation, ecology-zoology, man and environment interactions, traditional and local cultures, etc. ...
I should have stayed at the Danube!

Enough for now! Thank you for your attention

Christian Baumgartner
response & ability
christian.baumgartner@responseandability.com
On solid ground again
DEMAND FOR ENVIRONMENTAL PROTECTION DURING THE HOLIDAYS – GERMAN POPULATION, >14 Y

Source: Deutsche Reiseanalyse (German Travel Monitor); 2012-2015
### Target groups and needs for offers

<table>
<thead>
<tr>
<th>Source</th>
<th>Target groups / guest segments</th>
<th>Characteristics</th>
<th>Needs for offers in tourism in PA</th>
</tr>
</thead>
</table>
| LOHAS-Studie (Wenzel et al. 2005)                           | Lifestyle of Health and Sustainability target groups | - lifestyle-oriented, growing target group interested in sustainability products  
- sense of responsibility, values | - Sustainable offers  
- Intact environment  
- Hybrid lifestyle offers based on both/and-principles |
| Zukunft des Ferienreisens (Bosshard & Frick 2006)          | Holiday makers                          | - New understanding of prosperity, new values: ecological, ethical and social attitudes  
- sense of health  
- responsible, nature-oriented lifestyle | - Not the most expensive, but good basic quality  
- Periodical short holidays near home  
- nature-oriented and health-oriented offers  
- reserves, wilderness  
- responsible tour operators |
| Naturnaher Tourismus in der Schweiz (Siegrist et al. 2003)  | Tourists close to nature with subtypes:  
- athletic  
- regional  
- ethical  
- earning little  
- cosy | Most important preferences:  
- stunning landscapes  
- near-nature cultural landscapes  
- wilderness  
- biodiversity  
- protected areas | - Wildlife observation in pristine landscape  
- small, inexpensive accommodation  
- atmosphere typical of the region  
- regional and organic cuisine  
- tours without guides |

Siegrist, D., Ketterer L.; Touristische Potentiale der Österreichischen Naturparke, 2009
<table>
<thead>
<tr>
<th>Source</th>
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<th>Characteristics</th>
<th>Needs for offers in tourism in PA</th>
</tr>
</thead>
</table>
| Erlebniskompass (Siegrist & Wasem 2007) | Tourists close to nature       | - Attractive and intact landscape  
- Authenticity and uniqueness  
- holism  
- information and interpretation  
- active adoption of nature and culture | - Contrasts within a small area  
- Products and services typical of the region  
- combination of different forms of experience  
- professional offers of interpretation  
- locomotion, design |
| Naturparke Burgenland (Weixlbaumer et al. 2007) | 84 % daily visitors            | - Personal rest (relaxation, enjoying tranquillity and vacation)  
- acquiring knowledge  
- late 40s, higher level of education | - Spending time with friends  
- journey by car |
| Naturpärke Kärnten (A) (Handler & Siegrist 2008) | - Families with children  
- Young seniors and spa guests  
- Locals looking for rest nearby  
- more and more daily visitors | - Need for deceleration  
- Consciously enjoying natural and cultural landscape experiences | - Intact nature  
- hiking, outdoor sports, wellness and health offers  
- gastronomy – regional specialties and products |

Siegrist, D., Ketterer L.; Touristische Potentiale der Österreichischen Naturparke, 2009
<table>
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<th>Needs for offers in tourism in PA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Naturpark Rieserferner-Ahrn (Südtirol) (Lehar et al. 2003; Amt für Naturparke Bozen 2004)</td>
<td>Visitors staying overnight &gt; 40 %</td>
<td>1. Rest and health 2. Avoiding mass tourism 3. Exploring natural environment and cultural region 4. observing and experiencing Alpine fauna and flora 5. hiking in groups, gregariousness</td>
<td>Nature park is an important criterion in the choice of holidays (40 %)</td>
</tr>
<tr>
<td>Nationalpark Vanoise (F) (AGC Consultants 2002)</td>
<td>- High percentage of daily visitors - couples, on average &gt; age 46 - families with children (24 %) - university graduates, rarely blue-collar workers - high percentage of visitors coming again</td>
<td>65 % of the visitors know one of the five most important attractions of the national park</td>
<td>- Hiking (49 %), taking a walk (43 %) focus: summer - Visits to Alpine huts, lakes, glaciers, waterfalls</td>
</tr>
</tbody>
</table>

Siegrist, D., Ketterer L.; Touristische Potentiale der Österreichischen Naturparke, 2009
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<tr>
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<th>Characteristics</th>
<th>Needs for offers in tourism in PA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Naturpark Blockheide Gmünd – Eibenstein (Maier 2004)</td>
<td>- High percentage of daily visitors</td>
<td>Most important motives:</td>
<td>- Intact landscape</td>
</tr>
<tr>
<td></td>
<td>- high percentage of regular visitors</td>
<td>- natural landmarks and landscapes</td>
<td>- Taking walks within good recreational infrastructure (signposting, trails, maps etc.)</td>
</tr>
<tr>
<td></td>
<td>- landscape-related visitors (25 %)</td>
<td>- taking a walk</td>
<td>- possibility to go by car to the entrance of the nature park</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- rest, tranquillity, relaxation</td>
<td></td>
</tr>
<tr>
<td>Naturpark Zillertaler Alpen (Fröhlich 2008)</td>
<td>Most important potential target groups:</td>
<td>- hiking, mountaineering</td>
<td>- Intact landscape</td>
</tr>
<tr>
<td></td>
<td>- alpinists</td>
<td>- Adventure and rest</td>
<td>- hiking, outdoor sports</td>
</tr>
<tr>
<td></td>
<td>- families with children</td>
<td>- active, athletic activities in the outdoors, trend sports</td>
<td>- Infrastructure for trend sports</td>
</tr>
<tr>
<td></td>
<td>- tourists searching to experience nature</td>
<td>- experiencing regional cultural and natural features</td>
<td>- cultural and scenic attractions</td>
</tr>
</tbody>
</table>

Siegrist, D., Ketterer L.; Touristische Potentiale der Österreichischen Naturparke, 2009
Positive visitor management supports the following objectives:

- Satisfying different target groups (e.g. children, the elderly, adventure seekers, walkers, horse riders, etc.).
- Increasing accessibility and avoiding traffic congestion.
- Preventing disturbance in sensitive areas.
- Supporting local social and economic development.
Monitoring is the systematic and regular observation of a place or destination, in qualitative (non numerical) and quantitative (numerical) terms.

- Visitor numbers and types
- Visitor activities
- Visitor satisfaction
- Impacts of management and infrastructure
- Environmental impact of tourism
- Socio-economic impact
- Trail conditions
Combination of sport and environmental education

Vorpommersche Bodenlandschaft, DE