

The Potentials of Ecotourism in Austria

Abridged version

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Why do we need a study about ecotourism in Austria?

„Ecotourism“ in Austria – a new vacation opportunity and future perspective for the Austrian tourist industry? Or is that seemingly new approach merely "old wine in new bottles" rather than a promising alternative to the current holiday choices? This question is by no means out of context, there are a various reasons to elaborate on it.

Prior to the European Preparatory Conference for the World Summit on the "International Year of Ecotourism 2002" in September 2001 in St. Johann/Pongau the Institute for Integrative Tourism and Leisure Research was asked to carry out a study on behalf of the Ministry for Economy and Labor in order to provide first results on the possible potentials of ecotourism in Austria.

The development of ecotourism should go hand in hand with a certain level of sustainability as this approach makes it possible to create new, future-oriented vacation opportunities. It also offers new ideas and suggestions for the Conference in Rio as well as for the follow-up conferences on environmentally, socially, and economically compatible development (AGENDA 21, Biodiversity Convention, etc.). However, considering the existing variety of interests it is very difficult to answer the question about the specific needs of one generation. And so far, sustainability has hardly ever been found in regional tourist development. Several more extensive indicators for sustainability have only existed for a short period of time – as described in our study on the indicators for the evaluation of sustainability – and have yet to be implemented.

A study on the possibilities of ecotourism in Austria also picks up the thread of a discussion that has been going on in Central Europe as well as on an international level. It is thus important for a further discourse on ecotourism that we don't make the mistake to proceed on the assumption of a "general" understanding but instead focus on the different individual aspects of ecotourism without neglecting the inherent concept of sustainability.

The presented results are based on extensive literature and data analyses, well-founded conversations with 15 experts from the tourist sector, and interviews with tourists that were carried out for that particular purpose at the "Ferienmesse" (Tourism Fair/Holiday Fair) in Vienna and the "Internationale Tourismusbörse" (International Tourist Exhibition/International Tourist Fair/International Tourist Exchange) in Berlin in beginning of 2001.

Results in 10 theses.

1. Nature tourism is not an invention of the 21st century.

A closer look at history shows that nature-based tourism is no invention of the 21st century. However, only the technological developments of the 19th and 20th century (transportation systems, mass communication) have led to an increased mobility and to a globalization of people's wanderlust. Nature tourism has nowadays become an enormously important part of the global tourist industry. Especially in view of ecotouristically motivated travel one needs to ask whether it is ecologically AND socially

compatible. The answer to these questions of (holiday) travel as well as the travelers' responsibilities will be decisive for future ecotourism activities and discussions.

2. The decisions about ecotourism will depend on the topics of regional development and the choice of transportation.

Ecotourism activities mainly include *stays* in natural surroundings and *getting to know* different landscapes/cultures, but also *local* and *regional* projects providing the local residents with opportunities for sustainable development. That's why ecotourism isn't possible without a certain focus on the specific region. In this context one needs to take into consideration that regional needs may vary from place to place even within a very small area and may be expressed in different ways by different interests or interest groups.

Therefore it would be sensible and necessary in each case to ask all the residents of a certain area to participate in drawing up a regionally focused guideline and action catalogue – taking into consideration international conflicts – which would render the concept of ecotourism more concrete and transparent for all the participants.

Ecotourism activities, which are developed by a local village or region, offer

- opportunities to stay in or get to know nature (e.g. by means of guided tours in national parks or nature reserves, hiking tours) and/or
- direct opportunities to get to know the ecological, cultural, and historical characteristics of a certain region (e.g. by means of visitor's tickets, combined packages, transportation packages, etc.).

Ecotourism activities, which are developed by individual or a network of hosts, offer

- special accommodation packages (e.g. farm holidays, hotels with an eco-label, hotels and enterprises implementing a social/ecological company concept, etc.) and a choice of activities in this area (e.g. visitor's tickets, transportation packages).

The greatest challenge for the future will be to differentiate between "ecotourism marketing gags" and opportunities which are really valuable for a certain enterprise or region and need good marketing.

All of the ecotourism activities need to fulfill the following criteria:

- environmental soundness
- social compatibility
- economical compatibility (i.e. socially/economically oriented)
- cultural sensibility
- a sense of responsibility
- natural soundness

- sustainable development perspective
- informed participation of the local population in the decision-making process
- regional development
- probably enabling financial contributions for protected regions

The **choice of transportation** is decisive: How can future trips focusing on the appreciation of nature, landscape and recreation be implemented without being disturbed by an increase of individual traffic?

Both topics – regional development and transportation – are extremely important for Austria. Various Austrian regions are faced with the problem of "transit and holiday traffic" from the north to the south (and the other way round), and some other areas highly frequented by tourists have to try to find a way to decrease and divert traffic. Although most of the visitors prefer to arrive individually and enjoy the greatest possible mobility at their holiday destinations they don't like to put up with holiday traffic in general. Therefore, less frequented areas have to ask themselves to what extent they want to allow holiday traffic.

3. Ecotourism could present a certain potential for some regions.

Ecotourism is no all-inclusive club package that won't give the visitors a chance to experience the surrounding region. Regional tourism thus needs to offer more than just bed and breakfast: „What kind of measures will induce holiday-makers to stay for a longer period of time?" is the question to be asked in this context by each region. Interlinked marketing concepts, producer/product-marketing co-operations need to be established. Eco-regions ought to get together and develop joint packages and activities.

Indicators for "Eco-regions"

- density of organic farmers within the region, as a sign for existing pioneers (pioneer function) regarding ecological product lines
- marketing co-operation between agriculture and tourism (agricultural products being part of tourism packages, e.g. within the context of "farm holidays")
- variety of regional foodstuffs (as a special trade option)
- surface area of national parks and nature/wild-life reserves (NATURA 2000), biotopes, biosphere reserves and parks, etc.
- number of AGENDA 21 processes
- number of climate protection member municipalities
- opportunities for a more eco-efficient traffic plan
- number of initiatives and associations for activities and hiking tours in natural surroundings, thematic paths, cultural events, museums, etc.

It becomes clear, that the discussion about tourism and tourist policies should not only include the legal political representatives and social partners. The evaluations and decisions of independent interest groups such as the representatives of the Austrian travel agencies and tour operators, the providers of "farm holidays", the Circle of Private

Accommodators/Hosts, the Austrian Hoteliers' Association (Österreichische Hotelierversammlung), or the Association for Austrian Hospitality (Bund Österreichischer Gastlichkeit – an association of Austrian gastronomers) need to be taken into consideration as well. Various trends and innovative ideas, which may also arise from the discourse on the "International Year of the Mountains" as an impulse for sustainable strategies for regional development in alpine regions, will find a willing ear in these circles and be implemented accordingly.

4. Austria has a visitor's potential for ecotourism and quality tourism.

About 55.5 % of the total population go on vacation (data from Statistics Austria 2000). Most of the people going away on holidays are younger – if they travel more often – and/or are on average 30 to 39 years old. They have a regular income and tend to come from urban areas or large cities (Vienna) respectively; about 33 % of the 6.1 Million people vacationing during peak season stay within the country – the four most important destinations here are Carinthia, Styria, Salzburg, and the Tyrol. About 67 % of all the Austrian holidaymakers are drawn to foreign locations.

Germans make up the largest group of vacationists with 63 % of all the tourists in Austria, followed by the Austrians themselves with 27 %. The overnight stays of domestic travelers have increased by 3.5 % in relation to others during the last year (2000). A lot of visitors in Austria also come from the Netherlands, Great Britain, and Italy.

The profits from overnight stays, especially in luxurious accommodations (5 or 4 stars), increased by 6.3 % according to data from 1999. A similar trend could be observed for farm holiday homes/apartments (+3.9 %).

The results from the Visitors' Survey Austria 2000/01 (Gästebefragung Österreich 2000/01) show that people who travel to Austria for their summer vacation usually come here for the purpose of:

- recreation (65 % of all the interviewed people)
- hiking tours (49 %, especially in Vorarlberg and the Tyrol)
- bathing/lakeshore holidays (54 %, especially in Carinthia)
- cultural holidays (15 %, especially in Vienna and in the City of Salzburg)
- sports/bicycle tours (28 %, especially in the Burgenland)
- recuperative and wellness holidays (a total of 10 % of all the interviewed people)

Altogether, this implies a shift towards "quality tourism", i.e. although the number of accommodations and the bed capacity has only slightly risen the available options seemed to be more suited to the needs of the target groups and were in turn better utilized.

In the year 2000, the number of Austrians vacationing in a foreign country amounted to 67 % of all the holidaymakers, which is an average of 4.42 Million trips/year. Austrians

are thus a de facto target group for various appeals to an ecologically and socially compatible approach to tourism and a responsible stay in ecotouristically interesting areas.

5. The potential ecotourist: between 30 and 60 years old, educated, living in urban areas, with a preference for recreation and landscape, flexible in his/her choice of destinations in less frequented areas.

Nowadays, the large variety of holidaymakers makes it rather difficult to describe *one* specific type of traveler or to define a main target group for ecotourism. The proportion of the current expenses on nature-based tourism is estimated at about 7 % of the total expenses for tourism.

Using the results from various surveys (Life-Style Analyse 1999, Gästebefragung Österreich 2000, Statistik Austria 2001 und Reisende-Befragung 2001 – Life-Style Analysis 1999, Visitors' Survey Austria 2000, Statistics Austria 2001, and Tourist Survey 2001) to compose an "identikit picture" of the Austrian ecotourist, his/her profile could be described as follows: He/she would

- be between 30 and 60 years old,
- be most likely to have a higher education level and regular income,
- be more likely to come from an urban area and/or a large city,
- prefer recreation to action during his/her stay,
- mainly want to get to know and experience (new) places and landscapes,
- want to enjoy a comfortable stay far away from overcrowded tourist destinations, where he/she does not necessarily live on a small budget but at the same time doesn't spend too much money,
- choose a moderately priced summer vacation – either a relaxing beach vacation (sun, water, etc.) or recreational/walking holidays in the mountains,
- prefer smaller villages to internationally well-known and crowded regions, and
- once in a while indulge himself/herself in a (short) vacation at a more luxurious hotel.

The population groups most inclined to travel, especially to far-away destinations, are young and independent, have a high level of education, medium to high salaries and mainly live in large cities; people with a higher formal education tend to travel more often and take more educational trips than average.

The Tourist Survey (IITF 2001) cautiously implies a potential of about 29 % of people traveling in and to Austria for nature-based and environmental vacations. According to this survey the ecotourist holidays within Austria lasted an average of seven to fourteen days.

It may be interesting for tour operators that more than half of the people who were interviewed (64 %) expect competent environmental information about the holiday destination from their travel agents. As many as 71 % of all the interviewed people agreed with the statement that they prefer an agent who proves to be environmentally sensitive to other tour operators.

About 34 % of the people questioned during the course of this survey show an "ecotourist motivation" as it was defined by the WTO. The "ecotourist" interests of this group seem to concentrate on getting to know different surroundings (21 % want to get to know different areas and landscapes). The search for "different" people (e.g. getting in contact with indigenous peoples) and the observation of animals or the experience of natural environments, with 7 % and 6 % respectively, were less frequently mentioned as a reason to take a vacation.

If these data were projected onto the overall numbers of Austrian holiday travel, it would amount to a cautiously estimated possible holiday travel potential of about 2.1 Million ecotouristically motivated trips. (The surveys, which were carried out by the dwif/BTE in Germany and included interviews with tourists between the ages of 35 and 60, resulted in a rough estimate of a minimum of 0.9 Million and a maximum of 3.2 Million ecotouristically motivated German travelers.)

Almost everybody agreed that it is necessary to respect the way of living and the traditions of the local people, which mainly shows that this seems to be socially desirable tourist behavior as well. A slightly smaller number of people agreed with the statement that contentment during their vacation goes hand in hand with an unspoiled landscape. This surely is, as we can also see from other surveys, an essential factor for holiday satisfaction. About 91 % of all the people who were interviewed during the course of the Tourist Survey state that a close-up experience of nature ought to be part of their trip (53 % very important, 39 % important).

More than half of the people believe that a direct contact with nature is absolutely necessary for a "real holiday" – although staged contacts with nature, e.g. a trip to a national park or nature reserve (72%) or the possibility to observe animals (62 %) are considered to be slightly less important than first-hand experiences in natural surroundings.

At the same time, the vacationists demand a high level of hygiene and safety from their chosen location and expect to get enough information to be able to go on tours or hiking by themselves (i.e. independently). Altogether, one may say that travelers with an ecotourist interest want to find hospitality and a good cost-performance-ratio, local cuisine prepared with ingredients from that particular area, and accommodations in small hotels or apartments run by the local people.

Based on the results from a survey by Baumgartner/Hlavac 2000 and the data from the Life-Style Survey carried out by the Fessel Institute, one may assume that a certain

segment in Austria (an estimated 0.5 to 1.6 Million people) would be willing to spend 5 % to 20 % more money on an ecologically and socially sound vacation.

Thus the aforesaid activities, initially limited to an experience of nature, evolve into an extensive, sustainable development of tourism in a given region, which ought to be promoted accordingly.

Considering these data, the different ecotourism activities may be categorized as follows:

- trips to national parks and nature reserves
- visits to zoos and wild-life parks
- stays in areas less frequented by tourists, as for instance the Waldviertel, small alpine regions, etc.

It should be pointed out that hiking tours are considered to be close-up experiences of nature. In combination with the description of larger mountainous regions (Großvenediger, Karnische Alpen, etc.) it is the mountains that seem to provide a remarkable potential for a contact with nature. This may also be of interest in view of the forthcoming "International Year of the Mountains 2002".

6. Ecotourism in Austria: Nature-based (hiking or mountaineering) holidays on a farm, in eco-label hotels, national parks, nature reserves, and other ecologically interesting regions.

Based on the short definition by the WTO, stating that ecotourism is nature tourism, Austria features a large variety of ecotourism activities and opportunities.

About 19 % of the total area are taken up by various nature reserves that may be used for ecotourism. Adding potential eco-regions, a first estimation that has yet to be further substantiated suggests that 35 to 40 % of the Austrian countryside could be used for ecotourism. In addition to that, various museums, etc. provide enough opportunities for cultural education and the appreciation of the traditional characteristics of the region.

Making a projection of the results of this survey, one may come to the conclusion that about one half of the overnight stays in Austria show a potentially ecotourist motivation.

The criteria for "ecological tourism" which were discussed 10 to 15 years ago now indicate to what extent a "natural landscape" may form subjective patterns of perception for the slogan "active holiday" and/or "wellness holiday" that has recently moved to the foreground.

7. Ecotourism is not a new label or brand name but public relation and quality improvement of existing best practice: farm holidays, Neusiedlersee Card, Culinarium Austria, Alps Mobility, ...

Some experts from the Austrian tourist sector, who were interviewed during the course of this survey, firmly believe that "ecotourism" can't be used as a marketing label for a full range of holiday activities. Ecotourism can't? – at least not in Austria where it is by no means a niche market – open up new market shares. Instead, it would compete with the existing tourism activities – farm holidays, trips to national parks in co-operation with the respective region (e.g. Neusiedlersee Card), regional marketing concepts ("Käsestrasse" - cheese road, Culinarium Austria), wellness packages – and distort people's views on the actual product range and enhance the aspect of renunciation. This would not be very practical since many holidaymakers expect to get good food during their vacation and the large variety of fresh, farm-grown specialties and wines from the region is already considered to be indispensable in most hotels and restaurants.

In the future, the question of mobility will to a large extent decide whether a certain region will be subject to sustainable development or not: How do travelers reach a certain destination? Various concepts for short-distance public transportation and other alternatives that will allow people to use their own cars less frequently – such as taxi pools, visitors' busses, etc. – will be necessary. The model that was developed within the context of the "Alps Mobility" program in some areas can only serve as a starting point in this case. Larger regions will need to have a sustainable traffic concept. The visitor's registration forms, for instance, might include questions about the means of transportation used to reach the holiday destination, etc.

What kind of groups will be targeted and how these groups are already pre-selected by the choice of marketing will become more relevant. How can the "right" guests be approached? The number of bookings at holiday fairs and other events tends to decrease and individual travel – at least for trips within one's own country – increases. The means that are used by the providers to reach the holidaymakers will turn out to be more and more important. That's why the demand for alternative service concepts and marketing strategies aiming at information transfer and direct contact also rises.

Searching for differentiated consumer groups, one mainly has to ask what kinds of people would be interested in ecotourism: Vacationists who are looking for relaxation, active experiences in natural surroundings, or people on the lookout for greater meaning?

Sustainable tourism activities present a colorful construction kit that may be turned into an extensive tourist package: "Visitor's cards", for instance, can be used to visit a museum or national park in one place or a wine tasting in another place and they encourage people to explore the surrounding area.

8. Ecotourism is an initiative for bottom-up projects throughout Austria.

An agreement needs more than one partner and won't be successful without a certain ability and willingness to communicate. A certain region will only be able to take up a unique position if the people there are willing to fill these positions and to get involved.

An initiative for the advancement of regional ecotourism needs to be differentiated and designed in a practically oriented way by a supra-regional agency. The government and/or government agencies, for instance, could establish a foundation for a supra-regional exchange platform and the authorities responsible for tourism would need to reposition themselves. However, at the same time it will be necessary to make sure that "ecotourism" projects are encouraged to use a *bottom-up* rather than a *top-down* approach, which means that possible training programs and informational events ought to be guaranteed. From a practical point of view, an initiative for the promotion of ecotourism is expected to show the following characteristics:

Training events should aim to convey knowledge and information about new trends in tourism and novel strategies and methods. For this purpose, a certain kind of course system should be established to encourage an exchange of experiences and ideas with regard to similar problems between all the different branches of the industry. In addition to that it should also focus on the transfer of the acquired knowledge to one's own enterprise or field.

- How can new visions be implemented to use the opportunities on the market appropriately?
- How do individual enterprises develop and position their range of available products and activities?
- How do individual providers promote sustainable tourism within their own company?

9. There is still a need for further research on ecotourism.

In order to promote health tourism in alpine regions as an important "close-range recreational area" for Europe, one needs to take several factors into consideration: The Alps have increasingly turned into a preferred destination for short trips in Europe. And in the long run "holistic health" will become a prominent social topic. If a wellness vacation should be tied in with "ecotourist" ideas to create a holistic range of tourism activities, alternative traffic concepts and plans will have to be pursued. Wellness holidays don't exclusively take place in thermal spring regions, they may also include a stay in the mountains or in a sanatorium. In order to make these health-related vacations more "ecologic" one would have to utilize the existing environmental instruments. Future research on wellness clusters thus ought to include the existing regional networks and regional development strategies in a long-term economic concept. This would be much more valuable for these regions than the creation of new marketing labels. However, there is still a great need for a further and more detailed investigation of the categories offered.

Ecotourism will surely continue to gain in significance within the tourist industry. Therefore a forecast of the essential factors that will affect the demand on the market, the future economic importance and value potentials of ecotourism ought to be made for Austria. The selected methods in this context depend on the actual line of questioning and the available data. The research of value potentials (an analysis of future jobs, tax revenues, profits) and the overall potentials of tourism (tourist demand as compared to

other consumer's needs) as well as economic forecasts and simulations of the potentials of ecotourism have yet to be carried out.

Except for the results of the Visitor's Survey, there is hardly any substantial information about Austria as a market of origin for "Holidays in Austria", i.e. there is hardly any data about Austrian vacationists. This lack of information calls for an increased research effort.

Unfortunately, there is no survey about the joint goals and interests of "farm holiday" providers either. Currently there are 15,500 farms with more than 170,000 beds in Austria, but it hasn't been researched whether or how many of these 15,500 farmers are mainly focusing on tourism, i.e. using tourism as an alternative source of income, and how great the future capacity will be in this area. Since the exit barriers are rather small in these cases (e.g. no financial debts that would have to be paid by a family member who takes over the business) it is mainly the psychosocial situation in farmer families that can be seen as an important influential factor (e.g. passing on the farm to the next generation, private matters).

10. To sum it all up: Sensible planning and appropriate marketing strategies for best practice in Austria will bring about the best marketing opportunities for ecotourism in Austria.

Ecotourism activities will have the greatest marketing potential if the regional features are offered to the right target groups. In order to do this, sensible planning and an appropriate marketing strategy will be absolutely necessary. This will be most successful if a clear development strategy was established in, by, and together with the respective region.

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