Regional Economic Impact of Nature-Based Tourism in Swiss Forests

Dominik Siegrist & Karin Wasem
University of Applied Sciences Rapperswil (Switzerland)
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Project partners

HSR
University of Applied Sciences
Rapperswil
FTL Research Centre for Leisure, Tourism and Landscape
Institute for Landscape and Open Space

Dominik Siegrist
Karin Wasem

WSL
Swiss Federal Institute for Forest, Snow and Landscape Research
Research Unit Economics and Social Sciences

Kathrin Gehring
Marius Meyer
Marco Pütz
Anna Roschewitz

Founding: Swiss COST Programme
Project objectives

- Investigation of the importance of nature-based tourism in Swiss forests for the regional economy
- Identification of success factors regarding the improvement of value added in nature-based tourism
Project design

- Module 1: Basics
- Module 2: Demand analysis – visitor survey (WSL) → regional
- Module 3: Supply analysis (HSR) → regional
- Module 4: Delphi analysis (HSR) → national
- Module 5: Synthesis
"Nature-based tourism conserves nature and landscape and promotes the local culture and economy of the destination. These few words describe the responsible organisation of holidays in natural areas and in semi-natural cultural landscapes. This kind of tourism should arise from regional needs and should be co-determined by the people involved. Nature, landscape and environment as well as social, cultural and economic conditions should be taken into account and protected, promoted and financed in a sustainable way. This definition was developed in the contest of the International Year of Mountains (IYM) 2002 by actors in nature conservation, regional planning and tourism."

(Seco 2002)
Research questions of Delphi analysis

- Future development of demand for nature-based tourism activities
- Characteristics of tourist offers, which are successful regarding value added
- Restraints regarding design and establishment of nature-based tourist offers
- Significance of different strategies and measures regarding the increase of value added
- Required actions on the part of involved stakeholders
- Relevance of ‘forest factor’

→ Focus national, with a view on test region
Method

- Delphi method: a group of experts has been repeatedly confronted with questions of this survey
- 19 Swiss experts from the fields of forestry, tourism and regional development
- Generation of a joint expert opinion
- Online evaluation tool with open and closed questions, two-stage procedure
Results: potential demand

Development of demand potential of nature-based tourist offers

- Decreasing demand: 0
- Constant demand: 0
- Increase by 1-10%: 6
- Increase by 11-20%: 11
- Increase by 21-30%: 1
- Increase by 31-40%: 0

Number of replies (N=18)
Reasons for the expected demand

- Increasing health awareness of individuals over 50 years old
- Quietness, deceleration and nature experience to compensate bustling everyday life and high-tech leisure and tourist offers
- Physical exercise to compensate increasingly sedentary work
Results: future target groups

Most important future target groups for nature-based tourism

- Domestic population over 50 years old: 16
- Domestic family with children: 13
- People interested in environmental education (e.g., school classes, project groups): 11
- Domestic visitors without children: 6
- Travelling parties of firms and associations: 4
- Visitors from abroad: 2
- People interested in courses of outdoor sports: 1

Number of mentions (N=19)
Results: Most important activities
## Most important activities

<table>
<thead>
<tr>
<th>Currently most important nature-based activities:</th>
<th>Most important nature-based activities in the future:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ranking:</td>
<td>Ranking:</td>
</tr>
<tr>
<td>1. Hiking/mountaineering</td>
<td>1. Hiking/mountaineering</td>
</tr>
<tr>
<td>2. Mountain biking</td>
<td>2. Snowshoeing</td>
</tr>
<tr>
<td>3. Cycling</td>
<td>3. Guided nature excursions</td>
</tr>
<tr>
<td>5. Cross-country skiing</td>
<td>4. Ski mountaineering</td>
</tr>
<tr>
<td>7. Snowshoeing</td>
<td>5. “Fun sports”</td>
</tr>
<tr>
<td>8. Winter hiking</td>
<td>5. Climbing</td>
</tr>
<tr>
<td>9. Tobogganing</td>
<td>5. Winter hiking</td>
</tr>
</tbody>
</table>

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Results: relevance of the ‘forest factor’?
Relevance of the ‘forest factor’?

- Favoured landscape characteristics for nature-based tourism: „variation of forest and open landscape“, „close to nature“, „views/vistas“, „quietness“, „diversity“, „undeveloped and intact landscapes“

- Potentials for value added in forests is limited, priority is given to local recreation with nature-based activities

- But: Forests has to be seen as important integral part of traditional cultural landscapes

→ Forest does not have a big, but still considerable impact on the choice of destinations of tourists preferring nature-based offers
## Results: Important Attractions

<table>
<thead>
<tr>
<th>Natural attractions</th>
<th>Temporary attractions</th>
<th>Artificial attractions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Unique landscapes:</strong></td>
<td><strong>Sport events:</strong></td>
<td><strong>Theme parks:</strong></td>
</tr>
<tr>
<td>e.g. Swiss National Park</td>
<td>e.g. orienteering in Zermatt 2006, Jungfrau marathon</td>
<td>e.g. rope park</td>
</tr>
<tr>
<td><strong>Trails:</strong></td>
<td><strong>Visitor program:</strong></td>
<td><strong>Industrial attractions:</strong></td>
</tr>
<tr>
<td>e.g. Culture and long-distance trail Via Spluga, Chestnut trail</td>
<td>e.g. building and sleeping in an igloo</td>
<td>e.g. visitor mines, former slate mine “Landesplattenberg Engi”</td>
</tr>
<tr>
<td><strong>Means of transportation in attractive landscapes:</strong></td>
<td><strong>Cultural events:</strong></td>
<td></td>
</tr>
<tr>
<td>e.g. cable car Monte Lema</td>
<td>e.g. charcoal burning, Nature and Culture Weeks Binntal</td>
<td></td>
</tr>
</tbody>
</table>
Results: approaches of experience

Ranking of different approaches to experience nature and culture

<table>
<thead>
<tr>
<th>Approach</th>
<th>Mean (N=18)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pleasurably enjoy nature / culture (e.g., wellness offers, culinary highlights)</td>
<td>2.5</td>
</tr>
<tr>
<td>Discover nature / culture (e.g., wild game observation, excursions)</td>
<td>2.28</td>
</tr>
<tr>
<td>Actively experience nature / culture (e.g., mountain biking, trekking)</td>
<td>2.17</td>
</tr>
<tr>
<td>Collectively experience nature / culture (e.g., team building activities)</td>
<td>1.94</td>
</tr>
<tr>
<td>Understand and grasp nature / culture (e.g., thematic and educational trails)</td>
<td>1.67</td>
</tr>
<tr>
<td>Experience nature / culture as an adventure (e.g., new dimensions of speed, force, agility)</td>
<td>1.65</td>
</tr>
</tbody>
</table>

Categories: 3 = very important, 2 = important, 1 = less important
Results: potentials to create value added

Fields to create value added regarding nature-based tourist activities in forests

<table>
<thead>
<tr>
<th>Activity</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guided tours and excursions in the forest</td>
<td>1.29</td>
</tr>
<tr>
<td>Catering in local restaurants</td>
<td>1.24</td>
</tr>
<tr>
<td>Local accommodation</td>
<td>1.06</td>
</tr>
<tr>
<td>Sale of forest products (e.g. chestnuts, mushrooms, berries, wood)</td>
<td>0.71</td>
</tr>
<tr>
<td>Admission fees (e.g. for rope parks, baths)</td>
<td>0.41</td>
</tr>
</tbody>
</table>

Means (N=18) Categories: ++ = 2, + = 1, 0 = 0, - = -1, -- = -2
Results: value added

Most important strategies and measures regarding the increase of value added

1. Professionalization of design and marketing of offers
2. Improvement of tourist service chain
3. Creation of authentic offers
4. Improved networking in the region
5. Event-oriented offers
6. Utilization of endogenous potentials
7. Editing of information regarding nature and culture
8. Identification of the region with development strategies
9. Diversification of offers
10. Fulfillment of individual visitor requests
11. Increase numbers of visitors
12. Improvement of accessibility by public transportation
13. Involvement of the public

Number of mentions (N=19)
Success factors of nature-based tourism

Regarding tourist offers:

- Financial and human resources
- Well working tourist service chain
- Quality and price/performance ratio
- Event-oriented and authentic offers, education of stakeholders
- Professional marketing, communication adapted to target groups

Regarding regional surroundings:

- Cooperation and networking, also with forest side
- Stronger participation of all stakeholders
Recommendations

- Improvement of tourist chain and of economic value added & regional cooperations with forestal providers and other stakeholders
- Linking nature-based offers and services with the forestry sector and further education of forestal providers
- Promotion of local providers and tour guides, stronger focus on overnight tourism than on day tourism
- Visualisation of the importance of the forest for the tourism sector
- The establishment of effective marketing instruments
Discussion

The idea of this study was to undertake a micro-analysis of one relatively small region in a specific type of forest landscape in Western Europe.

- Delphi analysis is a good method to evaluate expert opinion, but cannot replace the demand analysis.
- The question of the relevance of ‘forest factor’ needs more investigation, f.e. with choice analysis.
- This case study of an alpine region should be enlarged with other comparable case studies in other countries and (mountain) Regions in Europe.

→ European survey of nature-based outdoor recreation with different methods and cases?
Thank you for your interest!

dominik.siegris@hsr.ch