



Tourism and Nature

Key Market Trends and Important Implications for SMEs

PROWAD LINK

SUSTAINABLE GROWTH
& NATURE PROTECTION

Interreg

North Sea Region
PROWAD LINK

European Regional Development Fund



EUROPEAN UNION



Stenden

etfi European
Tourism Futures
Institute

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Colophon

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General Learnings and Application of Findings

Nature can be a driver for both sustainable tourism and local development. Natural assets have the capacity to attract visitors. To utilize these potentials SMEs are required to take actions and initiatives, while they have to manage the limits of acceptable change (LAC) properly. This report aims to identify the potentials of nature as driver of sustainable tourism and local development and to draw SME's attention to a range of implications.

Applications of findings

The objective of this report is to provide an overview of current trends in tourism in general and nature-based tourism in particular. It raises awareness about the various types of trends that are driving change and that could affect the operations of SMEs. Hence, it provides crucial insight into how changing trends and customer preferences will open up new market opportunities for nature-based tourism. Each trend is described to provide a first understanding and essential background information. For each trend, also implications are given that can be taken into account by SMEs. These draw attention to the possible actions SMEs could consider to seize market opportunities. SMEs can identify the most important trends, the most important implications and define the next steps. PROWAD Link partner organizations and their networks can use the overview presented in this trend study as a tool to engage in co-creation: to find out locally and/or for a subsector specifically which trends are going to shape the future for those SMEs.

The report elaborates on two main trends categories¹: *general topics and special interest topics*.

- The *general topics* are 1.) international (nature based) tourism, 2.) sustainable tourism and world heritage, national parks and other special nature areas, 3.) visitor management and 4.) social media. For each category, the report provides a list of **top trends**, a short **trend description** of these items and a range of **possible implications** for SMEs.
- The *special interest topics* are 1.) nature guided tours, 2.) fishing tourism, 3.) cycling tourism, 4.) bird watching tourism, 5.) kayaking tourism, 6.) walking & hiking tourism, 6.) food tourism, 7.) heritage tourism. For each category, the report elaborates on insights at **the consumer level, the industry level and the business level**.

General major learnings based on this trend report (see chapter 4 for full details):

Key trends in nature tourism and sustainable travel

- The shift to sustainability.
- The growing demand for meaningful experiences.
- The increasing variation in travel motivation (fluid identity of tourists).

Key trends in tourism management & marketing

- The increasing relevance of strategic planning and destination development.
- The progressing importance of coalition building.
- The massive shift to the online marketplace and online marketing.

Key trends in special interest topic

- The widening number of niche-markets within nature-based tourism.
- The tendency towards experience design.
- The formation of value chains and crossovers.

¹As predefined by the PROWAD Link project partners and specified in the project tender documents

1. Goals and Outcomes of the Study

1.1 PROWAD Link: the context

The project PROWAD LINK, funded by the Interreg VB North Sea Region program, was approved in June 2018. The 14 partners in the project are from Norfolk (UK), Geiranger (Norway) and Wadden Sea (Denmark, Germany, Netherlands). Amongst the partners are ministries, national parks, nature agencies, NGOs, from World Heritage nature sites and other special nature sites, emphasizing the importance of protection and prosper going hand in hand. The project uses the NBBC-model (Nature Business Benefit Cycle), where sustainable development – linking economic, socio-cultural and nature-environmental viability – is a premise.

To qualify the co-creation work with developing new sustainable tourism products, experiences and services, the PROWAD partners see the need for a desk research study to identify and show important trends in the markets for nature based tourism. This trends study is part of work package 6 (WP6) on development of sustainable tourism and experiences with nature as a driver for development. More precisely, it is *WP6.1. Market Trends – Nature as a Driver for Sustainable Tourism and Local Development*

1.2 PROWAD Link: work package 6.1.

The WP 6.1. study on market trends addresses the following goals:

Goal 1: To execute a desk research study in order to collect relevant knowledge such as analysis and reports and studies about international market trends in nature based tourism. With ‘relevant knowledge’ we mean: actionable insights for SME to apply in practice.

→ Outcome/deliverable 1: An overview of trends is produced, each trend is briefly described to inform SMEs and for each trend implications for SMEs are provided. The implications raise awareness and draw attention to actions that SMEs could take in the light of the respective trend.

Goal 2: To structure and prepare the collected knowledge into a usable report particularly for SMEs, providing actionable insights for SME to apply in practice. The report will have the end user in mind, being a user friendly report with a focus on visual forms (graphs, illustrations, tables) and limit the use of ‘lyrics’ and text.

→ Outcome/deliverable 2: Trend fact sheets are created to provide an overview of the trends.

For the PROWAD project partners these deliverables contain actionable insights and helps them to engage with SMEs from their regions to deal with or anticipate to these trends and their implications.

For SMEs these deliverables provide an overview of key trends as well as actionable insights to deal with or anticipate to these trends and their implications.

1.3 Structure of the report

The report is structured as follows. Chapter 2 explains the project approach, outlining the process of trend mapping and trends analysis. Chapter 3 provides the main findings, based on an interpretation of the trend overviews per trend topic which are presented in the tables in appendix 1 and 2.

2. Trend Mapping and Trend Analysis

2.1. Focus: general topics and special interest topics

The focus of this trend study is particularly on a set of general topics and a set of special interest topics. This set of topics was selected by the PROWAD Link partner organizations.

General topics	Special interest topics ²
- International (nature based) tourism	- Fishing tourism
- Sustainable tourism and world heritage, national parks and other special nature areas	- Cycling tourism
- Visitor Management (in relation to ‘overtourism’)	- Bird watching tourism
- Social media	- Kayaking tourism
	- Walking / hiking tourism
	- Local (ecological) food tourism
	- Cultural / local heritage
	- Cold water tourism

² These special interest topics include trends in the North Sea region and nature guided tours which is embedded across the other categories.

2.2. Trend mapping: the process of identifying trends

The trend topics outlined above are addressed by a multi-level approach to trend mapping. Multi-level means that we take into account the macro level to identify overall **mega trends** of change in tourism, to follow-up at the meso level of **core trends affecting the demand and supply of tourism** to finally zoom in on the specific micro level of **tourism products and businesses**. This is visualized in the figure below. Doing so allows to capture a very wide range of trends and allows, for instance, to put micro level trends in the context of larger developments in society.

- Mega trends: a limited number of generic trends in the political, economic, social, technological, ecological and technological domain that affect tourism development in general, regardless of the subsector or business type.
- Meso trends in the demand and supply of tourism. We looked at the demand side (relates to the customer journey: motivation, expectation, experience); the supply side; as well as actors/competitors active in the above mentioned trend topics; and industry level information that can be used for product development and marketing of new products from the partner regions to specific markets.
- Micro trends at the tourism product level of special interest topics. Our analysis focused primarily on the *emerging trends*³ in the supply of tourism products that can be characterized by a little amount of cases/examples, being recent phenomena, such as of new initiatives, innovations, experiments, or start-ups.

The search for knowledge about market trends for sustainable nature-based tourism did only include recent literature, and focused specifically on applied knowledge for “actionable insights” by SMEs. The selection of sources included reports from key institutions and organization such as UNWTO, World Tourism & Travel Council, European Travel Commission, European Parliament, European Commission, Economist Intelligence Unit, UNESCO, World Economic Forum, World Bank, OECD, EuroSTAT as well as tourism organizations and associations, public authorities, universities (of applied science) and private knowledge providers (e.g. Euromonitor, Foresight Factory).

³ Next to emerging trends, there are 1.) maturing trends, characterized by several cases/examples that can be observed, already more dispersed, being around for 2-3 years after its first emergence and 2.) mainstream, trends when many cases/examples can be observed, being widely dispersed and accepted.

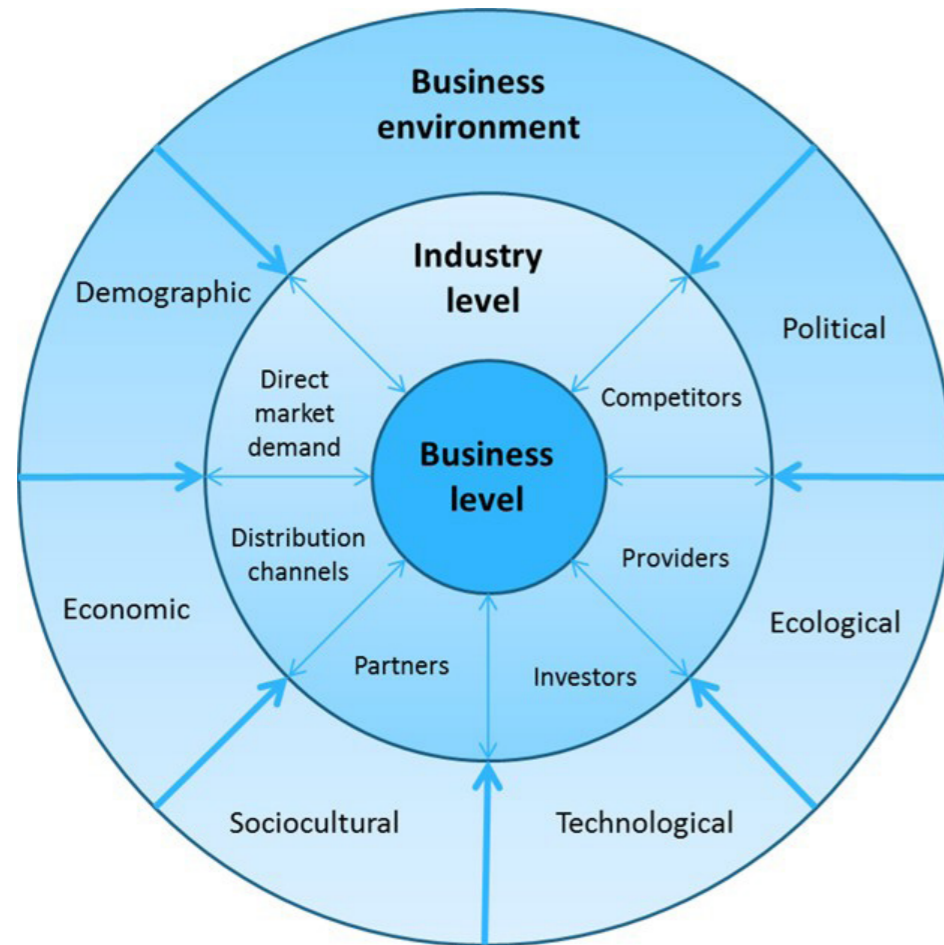


Figure 1: trend wheels⁴ provide an analytical framework for categorizing and presenting trends

2.3.Trend analysis: condensing findings into information

Trend mapping is followed by trend analysis; a structured approach to find cross connections between findings at different trend levels (see figure 1) and condense findings into useful information. The following sections present how the general topics and the special interest topics were analysed.

Trends analysis for the category of general topics

The activity of trend mapping (section 2.2.) provided a list of trends at various levels for each trend topic. First, the findings were condensed to provide a top 10 list per trend topic. Secondly, the top 10 lists were discussed and refined based on the outcomes of workshop with project partners on Fanø, Denmark on 22nd May 2019. Some trends were added, some trends were merged, and some were removed. Appendix 1 and 2 provide an overview of trends (table 1 to table 4, on page 9 to page 19). For each of the four general topics, a short description and a set of implications for SME are provided.

Important to note: due to this approach a short list emerged of trends that belong to different trend levels or are cross-cutting different levels – compare to figure 1

Trend analysis for the category of special interest topics

The activity of trend mapping (section 2.2.) provided a wide range of information per special interest topic. Chapter 4 provides a range of tables (table 5 to table 12, on page 20 to page 33) that presents the main findings. These findings also provide the input for the Trend Topic Fact Sheets (see section 4) that are created for each special interest topic.

Important to note: in relation to the trend wheel of figure 1, the findings relate to the inner circle of the level of business and products, the middle circle of trends at industry level and the outer circle of the level of the business environment where we limited⁴ the analysis to the consumer behavior and demand.

Key market trends and implications for SMEs?

The outcomes of the trend mapping and trend analysis steps are provided in appendix 1 and 2. The main findings are presented in the next section, and are based on the tables in appendix 1 and 2.

⁴In line with project tender documents

3. Key Market Trend and Important Implications for SME's

This chapter summarizes the main findings of the trends mapping and trend analysis steps. Appendix 1 and 2 present the full overview of the outcomes in a set of comprehensive tables.

3.1. Key trends in nature tourism and sustainable travel

The shift to sustainability.

There is an increasing awareness by many stakeholders such as policy makers, marketing organization, management organizations of (natural) territories as well as amongst visitors and (selected) tourism businesses of the impacts of tourism (e.g. discussion on overtourism, visitor pressure, limits of acceptable change). Sustainability is becoming a 'standard' and progressing beyond that as a selection criterion and for places/sites that fully integrate all aspects of sustainability it can become a reason to travel in itself. As many visitors become more experienced travelers and many news items on the negative impacts of tourism circulate, many visitors become very much aware of the need for sustainability and, in line, many are adapting their decision making behavior and onsite travelling behavior. Visitors are selecting destinations for their attention to sustainability, are willing to actively contribute to these beliefs and are likewise willing as well as able to positively adjust their spending behavior. As such, a focus on sustainability offers business opportunities. Moreover, when well-implemented, tourism is able to create value⁵ beyond merely economic returns and create value for ecosystem preservation, viability of socio-cultural customs, and enhanced sense of place and local pride. See appendix 1, table 1 and 2 for details.

The growing demand for meaningful experiences.

For visitors the quality of experiences is getting more and more decisive. Visitors increasingly search for experiences that matter, i.e. that generate memorable experiences, contribute to their quality of life, or wider (SDG) goals. They are relatively affluent and experienced travelers, which drive their search for quality experiences, uniqueness, authenticity, local culture (including Airbnb), gastronomy but also luxury, convenience, design/architecture and excellent hostmanship/hospitality. This trend challenges stakeholders to continually enhance the (spatial) quality and experiential value of local tourism products and sites. See appendix 1, table 1 and 2 for details.

The increasing variation in travel motivation (fluid identity of tourists).

Visitors of today trend to have a fluid or hybrid identity: shift and switch from one activity or preference to another. Nature based-tourism could be just one type of tourism or activity that is sought by visitors as a part of or as a stopover in a longer, more diverse journey. For example, combining a city trip with an escape to more rural, natural places. Implications for SMEs are to expand on the multiple reasons-to-travel, to match the fluid identity of tourists and capture the attention of larger groups.

⁵Rli (2019) Waardevol Toerisme: onze leefomgeving verdient het. Den Haag: Opmeer papier pixels projecten; Heslinga (2018) Synergetic-tourism landscape interactions: policy, public discourse and partnerships. Groningen: University of Groningen

3.2. Key trends in tourism management & marketing

The increasing relevance of strategic planning and destination development.

Nature-based tourism requires tailor made approaches to fit highly sensitive local contexts. The assets of heritage sites and nature areas are usable resources for tourism development but also values that need protection against disruptive forces that equally relate to tourism. The phenomenon of overtourism is currently widely discussed. The importance of 'balanced growth' is more and more seen and accepted by various actors; visitors, entrepreneurs, governments, (non-governmental) organisations and educational institutions. Strategic planning needs to incorporate and clarify the limits of acceptable change. Within these limits, that are set for good causes, entrepreneurs need to find ways to run economically viable business models as well as mobile resources to continually innovate to keep up with the dynamics of society. See appendix 1, table 3 for details.

The progressing importance of coalition building.

The goals/ambitions of finding balanced growth, setting limits of acceptable change and pursuing viable business models within these conditions are intertwined. As the tourism industry is growing, rapidly professionalizing, and its impacts become larger actors encounter that they are depended on each other. This is the case at the level of value chains of tourism businesses that collectively need to create good offers to visitors to the level of tourism destination where public, private, NGO stakeholders meet and collaborate. Entrepreneurs need to (or are forced to) understand the domains of policies, politics and legal affairs and the other way around to understand the motives and complexities of operating a tourism business. Organizing and institutionalizing these coalitions is taken up as a response and joining them a responsibility felt by many actors that consider themselves stakeholders. Platforms emerge where people share stories, align perspectives and create visions on future situation to achieve and situations to avoid See appendix 1, table 4 for details.

The massive shift to the online marketplace and online marketing.

The adoption rate of online platforms, mobile devices and broadband internet is high amongst visitors. Consumers want trouble free, hassle free ways to do their booking. Booking systems, booking platforms and online booking modules cater to this need. For suppliers, this means that a shift to the online marketplace is necessary. This requires time and energy in engaging in e-commerce (online booking systems, developing social media channels, producing video content for visual storytelling, stimulating user generated content, mobilising influencers (blog, vlog, native advertising), optimising processes via marketing intelligence. See appendix 1, table 4 for details.

3.3. Key trends in special interest topic.

The widening number of niche-markets within nature-based tourism.

Diving into the special interest topics results in a wide variety of tourism products and experiences that are presented on the tourism marketplace. Each one promotes a specific type of activity aiming to attract a specific target group or community, thereby addressing or creating a niche market. Whereas this diversification is required to attract the attention of the visitors (e.g. more unique, more reasons-to-visit, etc), it requires individual SMEs to choose and specialize their approach in order to be convincing for visitors. See appendix 2 for details.

The tendency towards experience design.

In the review of all special interest topics, the experience economic is becoming leading as visitors nowadays are highly demanding and entrepreneurs see opportunities as there is a higher willingness to pay for experiences, particularly when these are memorable. SMEs need to research the visitors’ motivations and expectations and design experiences that exceed expectations in order to become memorable, sharable, instagrammable. See appendix 2 for details.

The formation of value chains and crossovers.

The review of the special interest topics reveals that the interconnectivity between the individual topics is large. Both from a visitors’ perspective as they tend to make all sorts of combinations during their visitor journey as well as from a suppliers’ perspective as entrepreneurs diversify their activities themselves within a single (or portfolio of) business(es) or reach out to colleagues to create routes, packages, festivals. See appendix 2 for details.

Appendix 1: General Topic - Overview of Trends

Table 1: TRENDS in <i>INTERNATIONAL (NATURE BASED) TOURISM</i>		
Trend	Description	Implications & actions
<p>1. <u>Strong competition drives the need for competitive, high quality offer</u></p>	<p>Globalization is driving immense international competition. Many businesses are emerging. Some businesses become very large scale. Bigger supply drives the need to stand out, to professionalize and specialize. Also for destinations. That means also for nature areas that present themselves are places to visit.</p>	<ul style="list-style-type: none"> - Avoid copy-cat behavior and competition on price. Competing on price drives prices down and business will not be viable - Diversify compared to the competition and find productive collaborations: on local level, on regional level, on a thematic level - Pursue outstanding quality, focus on hospitableness, comfort and given the target group also luxury - Utilize online platforms (OTA) such as Booking.com, Tripadvisor, Airbnb - Connect to special interest groups ('tribes') – see appendix 2
<p>2. <u>Emerging demand for experiences that matter (experience economy)</u></p>	<p>In today's society affluence is high. The middle class is on the rise. There are more people with more money, but limited time. Many of them are experienced travelers with high demands. This drives the search for quality experiences, uniqueness, authenticity, local culture (including Airbnb), gastronomy – creating unique conditions and opportunities for nature area that present themselves are places to visit.</p>	<ul style="list-style-type: none"> - Take a visitor's perspective to review and update your offer and identify flaws in the value chain and/or service provision on a destination level - Know and enhance the wow-moment of visitors - Utilize uniqueness, authenticity - Self-critical: pursue outstanding quality - Constantly renew and innovate - Visit locals: Airbnb, local guides, local expertise, local customs

Table 1: TRENDS in *INTERNATIONAL (NATURE BASED) TOURISM*

Trend	Description	Implications & actions
<p>3. <u>Increasing variation of niche markets</u></p>	<p>The consumer market is quickly diversifying, with as a result the emergence of many but diverse niche markets and ditto specialized activities that are sought after them.</p> <ul style="list-style-type: none"> - Internationalization: China, India, Middle East - Generation Y: young ‘digital natives’ - ‘Silver’ economy: old and affluent - Business tourism & MICE (meetings, incentives, conference and events) - Voluntourism: volunteer tourism - Adventure tourism - Ethical tourism: visitors that favour local companies - Single tourist (who may travel in groups) - Extended families: multiple families travelling together - Multi-generational travel: grandparents with grandchildren, multiple generations together - City breaks & urban tourism 	<ul style="list-style-type: none"> - Market knowledge and market access can be difficult, due to the amounts of niches, fragmented target groups and fluid behaviour of tourists. - Choose very precise which target group, segment or lifestyle to focus on. (e.g. for Dutch SMEs use www.leefstijlvinder.nl). Some have very specific demand and some do not combine well. - Create (collectively) user-personas to better understand your visitors. Gather data to do so (personal data, place of origin, motivation, expectation, experience, valuation) - Tailor your offer to the needs of your targeted group (e.g. inspired by personas) - Do not stage! If it’s not genuine, visitors notice. For instance, no not see sustainability as a trick or marketing tool but as an integral part of the business philosophy. - Connect to specialized small tour operators that focus on green travel. - Connect to “travel counselors” that use their supportive network to create local authentic experiences - Connect to influences (see social media, table 4) - Become part of a tour/arrangement: a short (half day, dag) in a city break.

Table 1: TRENDS in *INTERNATIONAL (NATURE BASED) TOURISM*

Trend	Description	Implications & actions
<p>4. <u>Increasing variation in travel motivation (fluid identity of tourists)</u></p>	<p>Tourists want a bit of everything. They have a fluid or hybrid identity: shift and switch from one activity or preference to another. Nature based-tourism could be just one type of tourism or activity that are sought by visitors as part of or as a stopover in a longer, more diverse journey.</p>	<ul style="list-style-type: none"> - Increase the amount of reasons to travel. More reasons to travel make places more interesting, more diverse to visit and motivate to stay longer. - Seek partnerships with fellow (policy) entrepreneurs that are motivate to increase the reasons to travel - Seek partnerships with parties outside of the region/destination as customer journeys tend to include other places. Do not focus too much on a single destination. Follow the customer journey, to understand your partners in the value chain. - Allow for flexibility: rent out for single days not only weekend, or weeks
<p>5. <u>Demand for barrier-free travel and seamless customer journeys</u></p>	<p>Visitors have high demand and expectations, and are easily negatively affected by disruptions. The more fluent, problem-free, seamless the better. This has to do with finding (online) information, operational matters such as sign-posting, infrastructure quality.</p>	<ul style="list-style-type: none"> - Monitor suboptimal experiences from visitors and proactively address them - Take a visitor’s perspective: their positive and negative feedback is essential information as it is instrumental to improve the service quality. - Think beyond your own business or organisation: the negative reviews of visitors may have their root cause elsewhere. Actively engage others to solve issues. - Create destination wide collaborations to stimulate cooperation, unity and hospitableness throughout all parts of a destination
<p>6. <u>Increasing demand for healthy life-styles</u></p>	<p>Increasing attention to personal health, wellbeing and healthy ageing. People turn to the great outdoors for relaxation and seek active activities that enhance their mental and/or physical wellbeing</p>	<ul style="list-style-type: none"> - Activities: wellness, spa, sports, walking, outdoor, adventure, mindfulness, meditation, yoga, stress reduction - Gastronomy: local produce, organic, less meat, less alcohol, vegan - Gamification: competitions, trails, adventure runs

Table 1: TRENDS in *INTERNATIONAL (NATURE BASED) TOURISM*

Trend	Description	Implications & actions
7. <u>Increasing demand for place specific and unique experiences (sense of place & local identity)</u>	For destination branding and marketing, the local sense of place and local identities are increasingly important as starting points. These form the DNA of a place and determine what kind of supply is present and what kind of supply can be added.	<ul style="list-style-type: none"> - Define the business DNA / identity - Define the local regional DNA / identity / sense of place - Take an inside-out approach: what kind of visitors and tourism development match the local identity, the local sense of place. Alternatively stated, which type of tourism could fit in and do not disturb. - Capitalize on local sense of place: remoteness, rawness, darkness, quietness, authenticity
8. <u>Increasing demand for and growth in peer-to-peer travel (AirBnB, Uber, etc)</u>	Individuals are able to offer their products directly to visitors. Examples are AirBnB, Uber. This could increase the amount of (overnight) visitors also in places without formal accommodation provision, also in protected but inhabited areas.	<ul style="list-style-type: none"> - There are opportunities for locals to take part in the tourism sector - Seek collaborations with locals that take part in peer-to-peer travel e.g. local guides, local accommodation suppliers. - Avoid a sense of competition between professional accommodations and private accommodations, seek collaboration to on the whole strengthen the sector
9. <u>Increasing amount of technological applications</u>	High level of technology adaptation by visitors. Increasing mobile devices, wearables, online activity, online payments, booking systems. SMEs need to be ready for this. Enablers for sustainability emerge such as electric vehicles, solar panels, isolation, smart energy systems, domotica that could save operational costs and at the same time enhance comfort levels.	<ul style="list-style-type: none"> - Enhance online presence: create a website, create social media accounts, create content - Enhance online visibility: register on platforms like google maps - Be aware of search engine optimization; algorithms tend to change, updates are needed - Create coalitions: jointly create offers via (mobile) applications, virtual reality, augmented reality for storytelling purposes, awareness raising, education programs - Seek and utilize technological advancements that enable more sustainable operations

Table 1: TRENDS in *INTERNATIONAL (NATURE BASED) TOURISM*

Trend	Description	Implications & actions
10. <u>Increasing demand for value for money (quality & convenience)</u>	<p>Increasing quality orientation higher expectations</p> <p>Luxury, quality, convenience. This include practical matters such as hygiene and accessibility but also quality of the tourism products and services, including unique and spectacular nature, flora & fauna, scenery.</p>	<ul style="list-style-type: none"> - Visitors want local, unique and authentic experiences but they still also want 5 star hotels and comfort. This goes for small B&Bs and increasingly so for larger holiday parks - Build coalitions with local and regional suppliers to create place-based, place-specific offerings - Pursue outstanding quality - Invest heavily in hostmanship / hospitableness; it's a people business and people make the difference. Here; personnel should be a money maker, not seen as a possible cost saver (hiring only the youngest of personnel).
11. <u>Increasing demand for sustainable and socially responsible services and facilities</u>	The increasing attention to the negative impacts on society and the environment requires as well as forces businesses to show how they take their responsibilities towards their local context. For instance, how impacts are reduced, what measure for sustainability are taken, how compensation is provided for impacts, how visitors can contribute to e.g. nature preservation. Entrepreneurs have to embrace Corporate Social Responsibility – CSR.	<ul style="list-style-type: none"> - Envision how you can contribute to the Sustainable Development Goals (SDGs) - Avoid negative impacts on local (host) communities - Avoid negative impacts on local natural and built environments - Limit the use of natural resources (energy, water) materials, waste - Do not stage! If it's not genuine, visitors notice. - Create value for local communities and local environment - Responsible employer: contribute to career opportunities for youngsters, people with disabilities, minority groups ,etc.
12. <u>Increasing demand for safety & security</u>	Safety and security are key issues due to geopolitics and terrorism Preventive measure are needed	<ul style="list-style-type: none"> - Ensure safety, accessibility on business level and on destination level. - Provide information about safety levels, possible risks - Create coalitions to address issues at the destination level. - Promote places as safe destination for unworried holidays

Table 1: TRENDS in *INTERNATIONAL (NATURE BASED) TOURISM*

Trend	Description	Implications & actions
13. <u>Increasing importance of accessibility and acceptability</u>	Whereas the tourism industry has a tradition focus on the mass, there is an increasing attention for minority groups, via programs on 'accessible tourism' and 'GLTB acceptability'.	<ul style="list-style-type: none"> - Invest in accessible tourism; remove possible barriers to accessibility that hamper visitors to fully experience the tourism products, and refrain them from visits. - Promote acceptability; create open, understanding, safe social environments for all
14. <u>Increasing impacts of climate change</u>	Climate change will have a significant impact in terms of product offerings: changes in weather conditions, peak weather. It could potentially change landscapes, make places inaccessible or less appealing. It could require larger scale intervention in landscapes. It could require visitors to prepare themselves for changing weather conditions	<ul style="list-style-type: none"> - Understand possible consequences of climate change; peak weather conditions require all weather activities, sea level rise requires preventive measures, soil salinization may change ecosystems - Prepare for possible impacts of peak weather events: much rain, much drought, much wind - Develop weather resilient offerings and weather/climate independent offerings - Seek opportunities on business level, seek subsidies: wind energy, solar panels, isolation, switch from gas to electricity. - Seek opportunities on destination level: measure for climate adaptation could be utilized as investments in landscapes.

Table 2: TRENDS in *SUSTAINABLE TOURISM IN AREAS OF SPECIAL STATUS (WORLD HERITAGE, NATIONAL PARKS)*

Trend	Description	Implications & actions
1. <u>Increasing demand for insights into value creation</u>	Value creating is gaining importance, particularly in the context of overtourism and the awareness amongst visitors concerning the negative effects of tourism. The demand to understand how businesses create value beyond merely individual economic gains increases	<ul style="list-style-type: none"> - Businesses need to be transparent about and have a vision on the types of value they create beyond merely individual economic gains. - Have a clear purpose: raising awareness, educating visitors about local values and identities, enhance the fan base for a site/place, engage local community, cater for local (retail) economy and service level. - Communicate the purpose clearly to destination stakeholders - Create a combination of economic value, socio-cultural value, natural value.
2. <u>Increasing attention to travellers' identity, self-esteem</u>	This trend refers to serious leisure and project-based leisure, which relates to visitors who can be very, extremely interested in a particular leisure activity, possibly even finding a (new) career path. They are very committed to their cause, and may be more interested in staying longer to learn or do more, and are less stopped by barriers in terms of accessibility, travel time, service level.	<ul style="list-style-type: none"> - Differentiate in offerings: also cater to the needs of visitors who are highly interested. Consider specialised niche markets (biology, architecture, history, archaeology, geology, heritage, cultural-history, mindfulness, kitesurfing, music) and specialised activities (study tours, field trips, events, festivals) - Highly interested visitors: requires high level, highly specialised, knowledge intensive offerings to cater to the demand.
3. <u>Increasing importance of meaningful and socially responsible brands</u>	Branding is part of a communication strategy, generally involving the (re) creation of an identity that is recognizable by visitors and can be implemented throughout sites and places. E.g. a logo, slogan, use of materials, a consistently used 'look & feel'. This also applies to areas of special status that present themselves as destination and engage in the competition over visitors.	<ul style="list-style-type: none"> - Create a brand based on socially responsible entrepreneurship: corporate identity, corporate communication strategy - Engage in brand activation based on socially responsible entrepreneurship and enhance brand awareness: driving consumer action through brand interaction, experiences, campaigns to get consumers to act - Make use of branding activities based on socially responsible entrepreneurship by destination management organisation, national park organisation - Connect to actively co-create and co-shape branding, based on socially responsible entrepreneurship - Live the brand: it should be genuine otherwise visitors will feel disappointed.

Table 2: TRENDS in <i>SUSTAINABLE TOURISM IN AREAS OF SPECIAL STATUS</i> (WORLD HERITAGE, NATIONAL PARKS)		
Trend	Description	Implications & actions
4. <u>Increasing demand for festival related holidays</u>	Festivals are organised everywhere, from cities to remote places. When organised and managed well, they can contribute to local development goals. Festivals can be used to raise awareness about (unknown) qualities and can draw attention amongst larger or novel target groups	<ul style="list-style-type: none"> - Have a clear purpose: raising awareness, educating visitors about local values and identities, enhance the fan base for a site/place, fund raising, engage local community, cater for local (retail) economy and service level. - Communicate the purpose clearly to destination stakeholders - Themes to focus on: trails and adventure runs, music, local culture, 'silence & darkness', sense of place.
5. <u>Increasing awareness of and attention to limits of acceptable change</u>	The assets of heritage sites and nature areas are usable resources for development but also values that need protection against disruptive forces. This is more and more seen by various actors; visitors, entrepreneurs, governments, (non-governmental) organisations and educational institutions.	<ul style="list-style-type: none"> - Listen carefully to the sentiment of local stakeholders, by organising and collecting their perspectives and feedback on initiatives and development plans - Carefully assess the institutional and legal frameworks concerning the limits and possibility space - Engage in productive local dialogs, discuss what limits are, show understanding of other views, explore what change is considered acceptable
6. <u>Increasing importance to protect valuable sites to tourism flows</u>	Valuable sites and places have to be managed effectively to avoid negative impacts e.g. may be closed off to visitors and development initiatives may be restricted e.g. by means of zoning. Around these areas, there is a tendency to create transition zones where developments are utilized as investments that are able to enhance landscape quality. This allows for protecting the values of ecosystems and is more and more understood by visitors.	<ul style="list-style-type: none"> - Engage in site management and cooperation with nature protection agencies, researches and NGOs, - Avoid killing the goose with the golden eggs: protect and preserve key sites, places, areas by means of zoning (and enforcement!), visitor management strategies, information provision to draw attention and raise awareness, - Avoid disturbance or deterioration of important local natural assets: flora, fauna, landscape structures, geological structure, etc. - Seek synergies: utilize development projects as investments to enhance landscape quality - Engage in, discuss, negotiate and develop zones and transition zones, to meet demand regarding protection as well as development.

Table 2: TRENDS in <i>SUSTAINABLE TOURISM IN AREAS OF SPECIAL STATUS</i> (WORLD HERITAGE, NATIONAL PARKS)		
Trend	Description	Implications & actions
7. <u>Increasing willingness to contribute to ecosystem quality</u>	Increasingly, visitors are able and willing to contribute to the values of the destination that they visit to enhance their quality and reduce their impact.	<ul style="list-style-type: none"> - Stimulate a visitor 'fan base' of actively involved visitors, possibility also for financial support - Create investment funds to maintain the ecosystem quality based on tourism contribution, e.g. voluntarily and as a tourism tax - Stimulate nature clean up ("trashtag", "plogging")
8. <u>Increasing interest in circular economy applications</u>	In line with sustainability, there is an increasing attention towards the re-use of materials to avoid waste.	<ul style="list-style-type: none"> - Integrate circular economy principles into business: attention for use of materials, re-use and reduction of waste - Explore how circular economy applications can help to save costs - Actively seek funding or subsidy opportunities for circular economy applications

Table 3: Trends in VISITOR MANAGEMENT (key sources: UNTWO & CELTH, 2018; Peeters et al. 2018)		
Trend	Description	Implications & actions
1. <u>Increasing demand to disperse visitors within the site/place and beyond</u>	In the context of growing visitor numbers, there is a tendency to avoid the creation of too busy hotspots. Particularly when hotspots are also the places with low carrying capacity. These places are more prone to disturbance. The challenge is generally to spread visitors over larger surfaces to reduce their impact on the more visited places and the more vulnerable places.	<ul style="list-style-type: none"> - Host more events in less visited sites and places and in their surroundings - Develop and promote visitor attractions and facilities in less visited sites and places and in their surroundings - Improve capacity of and time spent at attractions - Create joint identity of site/place and its surroundings - Implement travel card for unlimited local travel - Mark entire site/place as a destination to stimulate visitation of less visited parts
2. <u>Increasing importance to promote time-based dispersal of visitors</u>	In the context of growing visitor numbers, there is a tendency to avoid peak moments with peak number of visitors. The challenge is generally to spread them move evenly over a day/week/month/year. This possibly allows for more visitors and avoids peak pressures.	<ul style="list-style-type: none"> - Identify opportunities/themes/ during off- peak months and promote them, - Promote dynamic pricing - Identify suitable events in off-peak months and stimulate them - Set timeslots (e.g. a maximum number of hours/days that someone can spend on a location or site) for popular attractions and/or events aided by real-time monitoring - Use new technologies (apps and others) to stimulate dynamic time-based dispersal
3. <u>Increasing importance to stimulate new visitor itineraries and attractions</u>	In the context of growing visitor numbers in hotspots and peak moments, there is a tendency to create new routes and places of interest to broaden and widen the offer of activities for tourist – in line with or as a solution to trend #1 and #2.	<ul style="list-style-type: none"> - Promote new itineraries at entry points and through the visitor’s journey, including at tourist information centres - Offer combined discounts for new itineraries and attractions - Produce guides and books highlighting hidden treasures - Create dynamic experiences and routes for niche visitors - Stimulate development of guided tours through less-visited parts - Develop virtual reality applications to famous sites and attractions to complement onsite visits

Table 3: Trends in VISITOR MANAGEMENT (key sources: UNTWO & CELTH, 2018; Peeters et al. 2018)		
Trend	Description	Implications & actions
4. <u>Increasing importance to regularly review and adapt regulation regarding tourism development</u>	Rules and regulations may be in place that are outdated, obsolete or counterproductive towards sustainable tourism development. Also, rules and regulations might be missing that can contribute to the steering and shaping visitor numbers and/or visitor behaviour. Communities need to be reflexive: critically reflect on and discuss regulatory frameworks and make adjustment when needed.	<ul style="list-style-type: none"> - Review opening times of visitor attractions - Review regulation on access for large groups to popular attractions - Review regulation on traffic in busy parts - Ensure visitors use parking facilities at the edge of sites/places - Create specific drop-off zones for coaches in suitable places - Create pedestrian-only zones - Review regulation and taxation on new platform tourism services - Review regulation and taxation on hotels and other accommodation - Define the carrying capacity of a site/place and of critical areas and attractions etc. - Consider an operator’s licence system to monitor all operators etc. - Review regulation on access to certain areas for tourist related-activities
5. <u>Increasing importance to enhance visitors’ segmentation</u>	Actively make distinctions between visitors based on the type and quality of tourist that fit the goals and aims of the destination. Some visitors and their behaviour are not fit for areas of special status whilst others are more favourable	<ul style="list-style-type: none"> - Identify and target visitor segments with lower impact according to the specific site/place context and objectives - Target repeat-visitors - Discourage visitation of certain visitors segments
6. <u>Increasing importance to ensure local communities benefit from tourism</u>	Currently there is much attention to the uneven distribution of benefits and costs. Therefore, the costs and benefits should be balanced more equally amongst stakeholders. Costs could be with park management organisation and heritage conservation agencies whilst profits could be earned by the commercial sector or via governmental taxes.	<ul style="list-style-type: none"> - Increase the level of employment in tourism and strive to create decent jobs - Promote the positive impacts of tourism, create awareness and knowledge of the sector amongst local communities - Engage local communities in the development of new tourism products - Conduct an analysis of supply-demand potential of the local communities and promote their integration in the tourism value chain - Improve quality of infrastructure and services considering residents and visitors - Stimulate development of impoverished neighbourhoods through tourism

Table 3: Trends in <u>VISITOR MANAGEMENT</u> (key sources: UNTWO & CELTH, 2018; Peeters et al. 2018)		
Trend	Description	Implications & actions
7. <u>Increasing importance to create site/place experiences that benefit both residents and visitors</u>	Currently there is much attention to the uneven distribution of benefits and costs. Therefore, the costs and benefits should be balanced more equally amongst stakeholders. Costs could be with park management organisation and heritage conservation agencies whilst profits could be earned by the commercial sector or via governmental taxes.	<ul style="list-style-type: none"> - Develop the sites/places to fit with the residents' needs and desires and consider tourists as temporary residents - Develop tourism experiences and products that promote the engagement of residents and visitors - Integrate visitor facilities within local festivities and activities - Create and promote local site/place ambassadors - Promote art and culture initiatives such as street art to provide fresh perspectives on the site/place and expand visitation to new areas - Extend opening times of visitor attractions
8. <u>Increasing importance to improve infrastructures and facilities</u>	Ambition to steer and shape visitor numbers and/or visitor behaviour might require investments in missing or suboptimal infrastructure and facilities.	<ul style="list-style-type: none"> - Create a site/place-wide plan for a well-balanced, sustainable traffic management - Ensure that major routes are suitable for extensive tourism activity and that secondary routes are available at peak times - Improve urban cultural infrastructure - Improve directional signage, interpretation materials and notices - Make public transport better suited for visitors - Set up specific transport facilities for visitors during peak periods - Provide adequate public facilities - Create safe cycling routes and stimulate bicycle rentals - Set up specific safe and attractive walking routes - Ensure that routes are suitable for the physically impaired or elderly visitors in line with accessible tourism principles - Safeguard quality of cultural heritage and attractions - Ensure cleaning regimes fit with tourism facilities and with peak times

Table 3: Trends in <u>VISITOR MANAGEMENT</u> (key sources: UNTWO & CELTH, 2018; Peeters et al. 2018)		
Trend	Description	Implications & actions
9. <u>Increasing importance to communicate with and engage local stakeholders</u>	Currently there is much attention to the uneven distribution of benefits and costs. Or the perception thereof. Therefore, the costs and benefits should be identified, transparent to have productive discussions about limits of acceptable change	<ul style="list-style-type: none"> - Ensure that a tourism management group (including all stakeholders) is set up and is regularly convened - Organize professional development programmes for partners. - Organize local discussion platforms for residents - Conduct regular research among residents and other local stakeholders - Encourage locals to share interesting content about their sites/ places on social media - Communicate with residents about their own behaviour - Unite disjointed communities
10. <u>Increasing importance to communicate with and engage visitors</u>	Visitors can have a huge impact in terms of their behaviour. This should be proactively addresses to draw attention to values of destination and raise awareness of the desirable and undesirable behaviour to promote responsible tourist behaviour amongst visitors.	<ul style="list-style-type: none"> - Create awareness of tourism impact amongst visitors - Educate visitors on local values, traditions and regulations - Provide adequate information about traffic restrictions, parking facilities, fees, shuttle bus services, etc.
11. <u>Increasing importance to set monitoring and response measures (support / carrying cap.)</u>	As stated by the UNTWO: "what you can't measure, you can't manage". To adequately manage tourism destination development, a system of data collection and monitoring should be installed.	<ul style="list-style-type: none"> - Monitor key indicators such as seasonal fluctuations in demand, arrivals and expenditures, patterns of visitation to attractions, visitor segments, etc. - Advance the use of big data and new technologies to monitor and evaluate tourism performance and impact - Create contingency plans for peak periods and emergency situations

Table 4: Trends in <i>SOCIAL MEDIA</i>		
Trend	Description	Implications & actions
1. <u>Increasing possibilities for direct-to-consumer (DTC) communication</u>	Entrepreneurs are able to directly contact individual visitors, particularly via social media. This allows for micro marketing and highly customized messages, also known as narrowcasting.	<ul style="list-style-type: none"> - Possibility to directly get in contact with individual consumers (via google, social media, influencers) and create a fan base, or even better a community that could be an instrument to improve your businesses quality - Need to engage in social media, online advertisement - Need to tailor messages to specific target groups
2. <u>Increasing importance of online reputation management (ORM)</u>	Visitors share information about the experience and perceptions via websites, social media and other online platforms. Moreover, consumers are using these insights for their own decision-making. It is a contemporary version of word-to-mouth. Hence, reputations can quickly change due to bad reviews.	<ul style="list-style-type: none"> - Promote good reviews, reward good reviews - Promote good articles, 'stories' - Collaborate with reliable influencers - Utilize bad review to upgrade the service quality - Actively engage with individuals that write bad reviews to gather learnings to improve your business and show your openness to dialogs and improvement
3. <u>Increasing possibilities and importance of video content & visual storytelling</u>	The adoption rate of online platforms, mobile devices and broadband internet is high amongst visitors. These are enablers for a growth in video content and engaging visual storytelling. As such, video content is more popular than written messages and photos.	<ul style="list-style-type: none"> - Actively engage on online platforms; social media, booking platforms - Create vlogs - Create video materials of high quality about the unique services. - Use video content to share engaging, authentic, personalized (visual) stories - Hire influencers - Use drone imagery - Explore the possibility to create a high-end movie/documentary about the place-based qualities (e.g. The Dutch cinema movie "WAD" about the Wadden Sea region and "De Nieuwe Wildernis" about the natural site of the Oostvaardersplassen
4. <u>Increasing importance of brief (ephemeral) content</u>	The speed in which content on websites, social media and traditional media is renewed is very high nowadays. To stay on the radar of the consumer, a constant flow of new, fresh content is needed.	<ul style="list-style-type: none"> - Create a constant flow of content on communication channels - Be creative in constantly creating new, engaging content. - Be aware of (changes in) Search Engine Optimization (SEO)

Table 4: Trends in <i>SOCIAL MEDIA</i>		
Trend	Description	Implications & actions
5. <u>Increasing importance of a well-developed communication mix</u>	Consumers nowadays are reachable via a wide range of communication channels. Focussing on one channel is a 'betting strategy' that may fail. Use multiple channels as a marketing funnel to (re)direct visitors to a website where bookings are possible.	<ul style="list-style-type: none"> - Do not focus on a single communication channel - Based on target groups, explore most relevant communication channels - Create a marketing mix as a marketing funnel to (re)direct visitors to a website where bookings are possible
6. <u>Increasing importance of user generated content</u>	Visitors create an immense amount of content themselves and share these with friend, families and followers. Moreover, consumers are using these insights for their own decision-making. It is a contemporary version of word-to-mouth. Hence, these are communication channels to (new) visitors.	<ul style="list-style-type: none"> - Promote the sharing of good content about the firm, region, destination - Design online promotions to attract likes, views and shares - Be aware of "Instagram potential", make items "instagrammable" - Offer (free) Wi-Fi to enable consumers to share their content
7. <u>Increasing use of influencers (blog, vlog, native advertising)</u>	Influences are active people on social media, often with a special interest and a specialized target group. They can be asked or hired to write, talk or videotape messages that they share with their followers. The fee often depends on their amount of followers. Moreover, influencers could be companies with a high or credible reputation (e.g. Lonely Planet, newspapers, magazines)	<ul style="list-style-type: none"> - Learn about influences that are useful for your target group - Influencers exists in all forms: they do not have to be expensive: some with little amount of followers can still address a niche group and can be affordable - Collaborate with fellow entrepreneurs and DMO's to attract influences - Create a clear strategy to use influencers - Advertorials, product placement, native marketing
8. <u>Increasing possibility of marketing intelligence</u>	The online platforms of today allow entrepreneurs and organisation to track the activity and behaviour of visitors. It provides insights into visitor characteristics (e.g. origin), their preferences (e.g. page views), their buying behaviour (e.g. booking)	<ul style="list-style-type: none"> - Use accessible tools such as Google Analytics - Use insights from booking and reservation systems: create insight into the types of visitors and their booking and spending behaviour. - Possibility to make better informed, data-driven investments. Enhance efficiency and effectivity. - Collaborate with knowledge institutions, local governments and/or DMO's to organise trainings on marketing intelligence

Table 4: Trends in *SOCIAL MEDIA*

Trend	Description	Implications & actions
9. <u>Increasing importance of possibilities via booking systems and platforms</u>	Social media and online platforms enable the adoption of booking systems. Consumers want trouble free, hassle free ways to do their booking. Booking systems, booking platforms and online booking modules cater to this need	<ul style="list-style-type: none"> - Implement booking systems - Offer online booking systems on website - Engage in online booking platforms such as booking.com, TripAdvisor - Utilize booking platform data to improve sales effectiveness and product development

Appendix 2: Special Interest Topics – Overview of Trends

Table 5: Trends in *CYCLING TOURISM*

Consumer Level	Industry Level	Business Level
<ul style="list-style-type: none"> - Cyclists are slightly more often male, most often aged between 40-60 - Relatively highly educated, relatively high income levels - Cycling is often seen as form of sport or physical exercise - Cyclists enjoy being close to nature - Cyclists most often travel in couples or small groups - Demand for safe routes - Cyclists tend to arrange travel and accommodation themselves - Cyclists like to combine cycling with other (adventurous) activities, wellness experiences, cultural holidays, and gastronomic offers (local products) - Cyclists demand customized cycling itineraries, applies especially to more experienced cyclists - Increasing number of electric bicycles, or e-bikes 	<ul style="list-style-type: none"> - Diversification in types of cycles: tour bikes, racing bikes, MTB, tandems, e-bikes, cargo-bikes, long distance bikes - Provide safe cycling routes: dedicated cycling paths and routes, well lit - Free traffic routes or low density traffic routes are created/selected to ensure safety, provide conform and improve the tourism offer - High quality cycling infrastructure networks: variety of cycling, routes and tracks, good road surfaces, clear and consistent route signage, route maps, information material regarding sightseeing, cycling maintenance shops. - Quality material; cyclist tend to want better material and gear to ride their bike. - Bike sharing /rental is on the rise in all sort of categories. From recreational cycles, to special activity bikes to (semi) professional - Multi-activity combinations: river cruises, for example, take along bicycles to offer passengers the chance to explore the shores. Bicycle trips are also increasingly added to city trips as one-day excursions, or longer. - Variety in offer from day trips and short trips. Both still show great potential. 	<ul style="list-style-type: none"> - Cycling-friendly accommodation: bicycle storage; drying room; repair room; cyclist breakfast; specific information for cyclists about routes and facilities in the locality. - Luggage transport to cater to the demand for service that help lighten the burden and improve the tourist's cycle experience at a destination - Knowledgeable guides; for guided cycling trips/tours, cycling tourists require their guides to be knowledgeable on topics such as first aid and bicycle repair. They should also be able to share information about the local nature and culture. - Create or connect to long distance bicycle routes, next to shorter route, to increase traffic along the existing routes - Provide online information about routes, services, experiences and to express the many reasons to visits - Offer bike sharing /rental possibilities, or in collaboration with other entrepreneurs. - Combining cycling with other activities: e.g spa/wellness, gastronomy, accommodation, city trips - Offer bike sharing /rental possibilities, or in collaboration with other entrepreneurs.

Table 5: Trends in CYCLING TOURISM

Consumer Level	Industry Level	Business Level
<ul style="list-style-type: none"> - Cyclist have a high interest in self-guided tours, e.g. making use of maps, existing routes, and apps such as Strava / Runkeeper - Sharing routes and performances amongst the more active cyclists via apps such as Strava / Runkeeper - Family-friendly trips, multi-generational travel - Bicycles are not just a means of transport, but an integral part of the travel experience. - Cycling tourism is considered a form of soft adventure or sports tourism. Soft cycling: enjoying the scenery while gently pedaling on a bicycle. Hard-core cycling: physical fitness is the main goal - Increasing use of online research. European (cycling) travelers increasingly research and plan their trip online. - Cyclist show a shift from owning to the sharing and renting of bicycles 	<ul style="list-style-type: none"> - Big events; the organization of large scale event about cycling are a trend. Some events are for professional cyclist that attract visitors, but mostly cycle events are aimed at non-professional cyclists. - Public transport integration: modal split and bicycle transport - Health lifestyle: promotion of cycling and cycling tourism as part of a healthy lifestyle - Sustainable travel: promotion of cycling and cycling tourism as part of a sustainable form of travel - E-bike infrastructure see an influx of investments, by governments, NGO and individual SMEs 	<ul style="list-style-type: none"> - Combining cycling with other activities: e.g. spa/wellness, gastronomy, accommodation, city trips - Theming bike tours: art, culture, nature, heritage, bird watching, local products - Adopt emerging activities: fatbiking, MTB, e-biking, cargo-biking - Offer crossovers with other modes of transport such as boat & bike tours, train & bike, - For groups or (semi) amateurs: create high end retreats, high level of comfort/luxury, training facilities and training camps, with professional guidance. - Provide services and facilities for e-bikes: more and more demand for (quick) charging - Seek opportunities provided by e-bikes: suitable for holidays, allow people who do not share the same level of fitness to enjoy cycling activities together, help cyclists ride longer distances per daytrip, and navigate routes with uphill sections more easily. This makes a wider range of destinations accessible to a wider range of cyclists, including senior cycling tourists. - Festivalisation: create one or multiple day events for cycling e.g. a cycling race, a specific (cultural/historically important) route (NL: 'Elfsteden Fietstocht')

Table 6: Trends in BIRD WATCHING TOURISM

Consumer level	Industry level	Business level
<ul style="list-style-type: none"> - Bird watchers form strong communities (local and internationally), both offline as well as online. - Bird watchers are the type of do good, feel good tourist - Bird watchers are relatively highly educated, relatively high income - Bird watchers often travel as individuals or couples. There is an emerging market for group travel for singles - Bird watchers pursue purposeful travel - Bird watchers range from elderly to youngsters: where birdwatching is traditionally associated with a relatively older public, it is now becoming popular among millennials - In bird watching there is the trend of multi-generational travel - Bird watchers show signs of a fear of missing out (FOMO): limited or last chance to see particular unique or endangered species 	<ul style="list-style-type: none"> - Strong bird watching associations: Link in with the associations, tap in with online platforms where bird watchers gather and share their experiences. - Little providers in NW-Europe: there is a little number of providers active on the European continent compare to other continents. - Limited number of hotspots: Europe has several hotspots: Wadden Sea Region (NL, DE, DK), Danube (Central and Eastern Europe), Camargue (FR) - Bird watchers as sustainable tourism; high awareness of sustainability, aware of their possible impact, above average spending behaviour - Emerging non-EU destinations: growing market in developing countries - Corporate Social Responsibility (CSR): bird tour operators to practice sustainable and socially responsible ecotourism which relies mainly on local goods and services and often involves supporting local conservation projects - Festivalisation: number of festivals featuring birds is growing exponentially - Create partnerships with local governments and by focusing on communities near important habitats help to form buffer communities: able to strengthen involvement in conservation often resulting in a reduction of habitat degradation and sometimes restoration 	<ul style="list-style-type: none"> - Provide bird photography activities: set out routes, guided tours, master classes - Embrace festivalisation: bird-centred or bird-inspired festivals, onsite location theatre - Bird Observatories 2.0: designed by architects. (reference: observatory in the Haringvliet, The Netherlands) - Bird watching combined with other activities such as walking, kayaking, architecture, culture, mindfulness, gastronomy. - Provide education & training to enhance bird watching skills - Possibility for winter seasons: for example 'Western Europe's Winter Waterbird Spectacle' by operator Tropical Birding - Use the hype: when unique species are spotted it may create an instant flow of large numbers of visitors - Manage expectations: bird watchers are very goal oriented. Promises about the presence of bird should be realistic. - Offer individualized or tailor made (for groups, families) offerings instead of one size fits all.

Table 6: Trends in BIRD WATCHING TOURISM		
Consumer level	Industry level	Business level
<ul style="list-style-type: none"> - Increasing number of birdwatchers are traveling to long haul destinations to spot new birds that cannot be seen in their own country or region - For many birdwatchers, the primary objective is to see as many species as possible. Birders are looking for species you can't see in other places - European travellers are increasingly interested in wellness, including mental wellness, as they look for an escape from their busy daily routines. - Bird watching is often a secondary purpose of a trip - Bird viewing and photography is "the most steadily growing [recreational] activity in the United States" 	<ul style="list-style-type: none"> - Usages of smartphone apps: birders increasingly use birdwatching applications (apps) on their mobile devices. These apps can serve as digital bird guides and scoring card. They help to identify birds by their colour pattern, shape, size and other features. There are even apps that can actively identify specific types of birdsong. Other apps allow birders to submit their sightings and use this information to map birding hotspots - Film tourism: movies and documentaries utilizing increasingly ingenious filming techniques for the coverage of bird life, have generated considerable interest for birdwatching in recent years - Animal welfare is becoming a major issue, especially for tour operators in northern and western European countries - Provides seek combinations of bird watching and other activities e.g. 'Birds & Art – Waterfowl spectacle & Dutch Masters' by operator Field Guides 	<ul style="list-style-type: none"> - Seek a combination of providing a diversity of bird species, opportunities for birders to socialize, and a scenic and relaxing environment - Cooperate with local stakeholders to offer "bird watching experiences packages" (hotel, travel, guided tours, arts, education)

Table 7: Trends in KAYAKING TOURISM		
Consumer level	Industry level	Business level
<ul style="list-style-type: none"> - Kayaking is regarded as healthy and an environmentally friendly way of sightseeing and touring - Kayaking with the whole family. - Kayaking and canoeing are associated with fitness benefits - Consumers generally seek a combination of activities, not just kayaking alone - Seeking alternative ways to explore and experience places and sites. - Kayaking often a side activity during a trip. - Niche market for dedicated multi-day kayaking trips - Seeking to escape hectic (urban) life and seeking tranquility of water bodies 	<ul style="list-style-type: none"> - Emerging diversification in terms of types of kayaking activities: long and short activities, tours, day tours, short distances, long distances. - Emerging differentiation in terms of locations where kayaking is offered: available widely from urban areas, rural, remote to natural areas. - Novel sporting categories in water sport increases supply and increases competition - Many but focussed suppliers: addressing niche markets - Offering of suppliers depends strongly on their context and natural environment - Constant introduction of new experiences: combinations with other enriching activities (nature, wildlife, architecture, tranquillity, adventure, adrenaline), - Constant adding of new activities to trips (camping, visiting remote places, reaching places only accessible by water, - Educational elements: content information about history, geology, nature, wildlife, natural values, - Gamification: competitions along routes and tracks 	<ul style="list-style-type: none"> - Many new types of kayaks, for different types of kayak activities (depending on the body of water): sea kayaking, whitewater kayaking, flatwater kayaking; all need different types of kayaks. - Mix and match kayaking for outdoor specialists: combining kayaking with other outdoor sports (bikerafting, packrafting, camping, sailing, skirafting, and even paragliding) - Guided all-inclusive tours of several days, full board, full service; but also self-guided tours - Promote kayaking for health reasons, fitness - Kayaking in indoor arenas (artificial waterbodies) - Urban kayaking: sightseeing, culture, architecture, gastronomy - Green kayaking: kayaking and picking up litter - Kayaking for tourists to explore landscape and nature in less crowded areas - Kayaking and marine wildlife watching, bird watching - Moonlight kayaking, kayaking at night - Serious kayaking: boot camps, training camps for skill improvement - Gamification: organise kayak events and competitions

Table 8: Trends in HERITAGE TOURISM		
Consumer level	Industry level	Business level
<ul style="list-style-type: none"> - People looking for their identity, roots, and belonging: a personal connection to a site instead of a connection to the history and objects - Pensioners looking for in-depth knowledge on history and cultural heritage; study tours - Iconic places are becoming more and more popular - People seeking authenticity - Interest in local identity, local DNA, local sense of place - High demand for cultural heritage tours, walking tours, boat tours - Large target market: demand from many target groups - Strong fascination for 'Dark tourism' - More and more interest in intangible heritage tourism - Festivalisation: Living History, reenactments 	<ul style="list-style-type: none"> - Identifying, branding, developing and marketing unique selling points (USP) and icons related to heritage: natural heritage, build heritage and cultural heritage. - Increasing attention to divert visitor from the hotspot to similarly interesting places that are (still) less frequently visited, more unique, authentic places - Diversification in heritage tourism: built heritage, cultural heritage, industrial heritage, intangible heritage, dark tourism. - Wide range of suppliers: from museums, former as well as operational factories and farms, cultural organizations and associations, micro breweries. - Identifying and ranking cultural heritage resources on geotagged social media for smart cultural tourism services - Reviving heritage: historical research to identify items in order to create tourism products - Re-enactments for entertainment and educational purposes - Bookings for experiential tours are rising - Themed tours and packages (e.g. Hanseatic route) are still being introduced. Whereas this is a mature trend, new themes and packages are constantly found. 	<ul style="list-style-type: none"> - Experiential tours. Local cultural heritage told via individual stories, feelings, emotions, being immersed, surprised, excited - High level of service: boattrips, luxury coach trips, full board trips - Use of apps for information, augmented reality and virtual reality to enrich experiences, gamification, smart museums - Lifelong learning courses for people interested in cultural heritage, study tours for highly, in-depth interested visitors - Cultural tours, walking tours, boat tours through the city - Combine logical combinations such as nature & architecture ("Dunes and Delta works tour") - Seek opportunities to capitalize on intangible heritage tourism: live with locals, local cuisine, local habits and customs (dance, music) - Stimulate interaction with local culture/ customs, for instance living like a local - Respond to overtourism; enable accessibility and availability of alternative offerings apart from the icons. For instance by geotagging

Table 8: Trends in HERITAGE TOURISM		
Consumer level	Industry level	Business level
<ul style="list-style-type: none"> - Interest in staged authenticity and tourism imaginaries: tourist are expecting certain types of tourism products and activities - Fed up with overtourism, seeking alternatives - Interested in adoption of new technologies (wearables, mobile devices) and their applications (information provision, virtual reality experiences and augmented reality experiences) 	<ul style="list-style-type: none"> - Rediscovery, re-interpretation and co-creation of (European) histories by connecting digital historical resources, opinion of citizens and physical locations (CrossCult, Horizon2020 project) - Staging authenticity and creating tourism imaginaries: tourist experiences that are made up especially for tourism purposes. - Digital Heritage Experience: investments in virtual reality environments, augmented reality layers (layer technology), enabling viewing of historical pictures in situ, maps, videos and 3D reconstructions (ROCK, Horizon2020 project). - Gamification to discover heritage: visitors geotagging (photos of) heritage sites on social media. A form of crowd sourcing, citizen science, peer-to-peer marketing - Creating edutainment experiences: crossover of educational goals and entertainment forms. Experiments in the field of museums 	<ul style="list-style-type: none"> - Stage authenticity and create tourism imaginaries: tourist experiences that are made up especially for tourism purposes. Could be close to reality, could be completely imaged/created (example: Disney Land, Legoland, many themed Outlet Centers) - Festivalisation: Living History, re-enactments - Invest in, utilize or draw visitors attention to applications of virtual reality, augmented reality - Stimulate peer-to-peer marketing and crowd sourcing: stimulate visitors to share their experiences and content with their peers. - Utilize peer-to-peer, crowd sourced information: what places are frequently visited and highly valued? For SME: add yourself (or in collectives) relevant information on online platforms - Create edutainment experiences: crossover of educational goals and entertainment forms. - Adaptive reuse of heritage sites/historical building to create unique places to visit and stay

Table 9: Trends in WALKING & HIKING TOURISM		
Consumer level	Industry level	Business level
<ul style="list-style-type: none"> - Emerging 'wanderlust': more and more people go for short walks and long distance hiking. In German studies: also young people. - Waling & hiking as a family activity - Walking long distances (trails, pilgrimage, trekking) - High expectations regarding experience: outstanding scenery, unique site and places, low traffic, high safety. - High demands regarding operational matters: clear routing, signposting, information provision - Accessible tourism on the rise: quite some people with handicaps and disabilities having special needs - Walkers & hikers often travel in relatively small groups, with relatively low impact on the environment - High interest in self-compiled and self-guided tours - Enhanced experiences by walking with animals e.g. dog, donkey, horse, lama, herd of sheep 	<ul style="list-style-type: none"> - Diversification: from short leisure activity by residents to multiday journeys by guests - Emerging interest in targeting solo travellers to join group tours - Adopting technologies: app-guided pre-defined walking routes - Walking and hiking tourism complements with other tourism resources such as accommodations, gastronomy - Governmental funding into infrastructure, itineraries, routing, signposting for local residents and promoting tourism - The interest in pre-defined walking routes can lead tourists to less visited areas of the destination - Multimodal travel: drive & hike, rail & hike, cycle & hike, sail & hike. Sometimes also from one train station to another 	<ul style="list-style-type: none"> - Facilitate self-guided tours: routing, itineraries, information provision, app development. Link and co-create routes to local suppliers of accommodations, shops, gastronomy. - Create and offer themed trails: wine, literature, film, history, art, etc. - Offer private guided customized journeys - Offer trips oriented around major geographical landmarks: mountains, coastal regions, national parks, islands - Combine services aimed at visitors for short routes (be a start and end of a route) and travellers of long distances (be stopover long a route). - Offer tours tailored to special physical conditions ('accessible tourism') - Create or connect to long haul routes: multi-day trips, pilgrimages, trails - Provide for walking and hiking activities from the perspective of contributing to mental and physical health and wellbeing. - Unexpected, unusual, unique destinations along routes: visit a working farm, a cheese making factory, forest, beach, etc. – to promote unique local elements, local produce, cultures and customs

Table 9: Trends in WALKING & HIKING TOURISM		
Consumer level	Industry level	Business level
<ul style="list-style-type: none"> - Hiking and walking is often combined with other leisure and tourism activities - Hiking and walking takes places in all types of landscapes: from urban to rural to remote. 	<ul style="list-style-type: none"> - Investments in accessibility for all target groups. 	<ul style="list-style-type: none"> - Seek niche markets within walking/hiking: snowshoeing, bare foot, beach walks, beach clean-ups - Festivalisation: create special events that allow access to normally not available routes, a normally closed area, a normally non-existing competition

Table 10: Trends in FOOD TOURISM		
Consumer level	Industry level	Business level
<ul style="list-style-type: none"> - The culinary tourist spends more and is more demanding than an average tourist, they reject uniformity - Millennials are the driving force behind culinary tourism. - Increasing interested in themed, specialized tours e.g. heritage, floral and garden, women only, BBQ, raw food, wild food, seafood. - The culinary tourist sees gastronomy as a means of socialization. - Search for authenticity in food and the social context around them. - Behavioural trends that affect food tourism: less meat consumption, more greens, more vegan, more local produce. - Relatively high willingness to travel for unique offering. - Increasing amount of (food) events and festivals. 	<ul style="list-style-type: none"> - Tour operators combine culinary tourism trends with other emerging trends e.g. ecotourism, adventure tourism, wellness etc. - Hotel industry is tapping into gastronomy. - DMOs are looking to diversify and are turning more towards intangible heritage such as gastronomy. - Platforms such as "Airbnb experiences" provide market accessibility. - Bookings for food tours, cooking classes are popular. Popular among US tourists: restaurant tours - Offering food experiences is suitable to SMEs as it builds on local culture, resources and skills, relatively low investments needed (foodtrucks, foodstalls, street food etc.) - Possibility to create year round offer. - Possibility to motivate visitors to visit more unknown, peripheral locations due to exceptional quality or unique offer - Festivalisation: pop-up food events, pop-up food trucks where there is enough tourism flow. 	<ul style="list-style-type: none"> - Mixed tours e.g. sailing & food, yoga & food, walking & food, language & food, cycling & food, culture & food, food & cruise - Food hopping: leisurely walk with a food guide, visiting multiple venues - Tasting tours e.g. olive oil, whiskey, beer, chocolate, etc. - Tours visiting local suppliers: farms, factories, breweries, gardens - Cooking holidays focussing on making of local dishes, cooking courses (hourly, day, multi-day) - Seed-to-plate-holidays: gardening/hunting/picking & cooking - Increase vegetarian and vegan offer - Food hunting in the wild - Winter culinary events - Festivalisation: pop-up food events, foodtrucks on festivals

Table 11: Trends in FISHING TOURISM		
Consumer level	Industry level	Business level
<ul style="list-style-type: none"> - Very large and strong communities. Many people with fishing licences. - Fear of missing out: limited or last chance to catch particular fish - Highly educated, high income - For many anglers, the primary objective is to catch particular type of fish, types of species you can't see in other places - Long haul travelling to destinations to catch particular fish that cannot be caught in their own country or region - Fishing is often not the only purpose of a trip: also being amongst friends, community, other activities - Fishing with magnets: not to catch fish, but to catch metal objects - Fishing tourism aligns with an interest in a sense of rawness, particularly on open seas, remote places 	<ul style="list-style-type: none"> - Larger, faster boats with better navigation equipment has helped spread localised effort - Numerous tours of professional associations of bass anglers often have their competitions broadcast on cable television (USA) - Lakes and streams are increasingly managed for lower catch limits and for habitat quality - Fisheries management emphasis continues to shift from management by stocking or replenishing lakes and streams to enhancing existing water quality and habitat so that species found in a body of water can better thrive through natural recruitment and reproduction - Wide diversity and variety of offering: from the cold waters of Norway to the warm waters of the Mediterranean, from highly professionalized sea fishing to recreational trips - Niche offering: join professional fishermen on their boats as spectators and/or volunteers - Professional industry reaches out to tourism and recreation: offering accessibility to ships, industries, by means of activities, tours, shops and restaurants - Animal welfare is becoming a major issue, especially for tour operators in northern and western European countries 	<ul style="list-style-type: none"> - Variety of organized boat tours: hourly tips, day trips, multi-day trips. - Packaging: combine trip, stay, tours to one of multiple locations for one of multiply types of fish - Combines well with gastronomy: trips to harbours, fish auction, suppliers, fish restaurants - Utilize the authenticity, uniqueness and rawness of active, operational harbours: spots where the interest in fish meets the industry and creates an environment for tourism products (restaurants, tours) - Combinations for the professional anglers: unique locations, unique fish, high-end quality material and comfortable accommodation in an all-in package. - Volunteer tourism (voluntourism) : assisting in fisheries, boats and refuges (incl. seals) - Address multiple target groups: both interesting a recreational activity for locals as well as activity for tourist from abroad. - Explore alternative types of fishing: magnet fishing, trash fishing

Table 12: Trends in COLD WATER TOURISM		
Consumer level	Industry level	Business level
<ul style="list-style-type: none"> - Shown interest in adopting new water sports activities that are relatively water temperature independent: e.g. stand up paddling, pedalo - Seeking unique places and unique activities, by experienced traveler that have visited hotspot already and/or are looking for non-frequently visited places - Prevailing weather conditions may be less significant as most activities are not highly weather dependent and in some cases – such as angling and bird watching – may actually depend on adverse weather conditions. - Traditional water sports activities show decline locally: sailing, surfing, yachting 	<ul style="list-style-type: none"> - There are many innovations going on in watersports tourism activities tapping into emerging technologies, cross overs (e.g. kiting and surfing becomes kitesurfing). - Importance of (personal) safety and (overall) security - Marinas become lifestyle sites for the more affluent communities, more than a parking lot for boat. They attract visitors from the shore, not only from board. Activities include operating restaurants, hosting band, deejays, weddings and other type of events and festivals - Island destinations do generally well even in remote places, Iceland, the Shetlands, the Hebrides, and the Falklands are examples. - The Isle of Man, the Channel Islands, and the Baltic islands of Bornholm, Gotland and the Ålands are examples of cold water islands which experienced their tourism heydays between ten and fifty years ago and have been struggling to adjust and re-focus their tourism offering in the light of changing market demands since that time - Cruise operators include cold water destination in their tours and packages (e.g. Baltic Sea) - Emerging destination in cold water tourism: Antarctica, North Pole. 	<ul style="list-style-type: none"> - Water temperature independent activities: kayaking, canoeing, rowing, surfing, kyte surfing, pedalo, boating, yachting, cruising - Seek opportunities in boating activities: <ul style="list-style-type: none"> o Traditional sailing ships (e.g. Clippers): small sector that depends on groups, school, associations and tries to provide more comfort. Some high-end luxury ships sail to near-polar regions. o River cruises, including bike & boat concepts o Cruises that offer routes/packages e.g. in o Recreational boating: more rental instead of ownership, larger vessels over smaller boats o Yachting: larger, luxury boats mooring at marinas o Jet-powered boats: adventure and adrenaline sports. - Develop marinas as lifestyle sites: not only for boat owners, also regular visitors. Add food (restaurant), beverage (bar), entertainment options (weddings, parties) and business options (meetings, conferences). - Tap into trend of comfort: wetsuits, all-weather activities and accommodation, combination with wellness, pick-up/drop-off, safety measure that avoid contact with cold water - Tap into trend of luxury: comfortable beds and huts on boats, luxury boats and yachts (for rent!), hand-crafted boats

Table 12: Trends in COLD WATER TOURISM		
Consumer level	Industry level	Business level
<ul style="list-style-type: none"> - Search for more climate friendly destinations due to strong winds, high waves, extreme low temperatures - Demand for higher comfort levels and luxury 	<ul style="list-style-type: none"> - Traditional water sports activities suffer locally from a decline in interest, such as sailing. - Emerging businesses on sharing and renting as society is slowly but surely moving from a focus on ownership to a focus on temporary usage (via renting, sharing, leasing). 	<ul style="list-style-type: none"> - Small and one man businesses that offer high quality, unique, hand crafted boats, surfboards, etc add much value and can possibly make a good margin. - Early adopter of new, emerging activity: jet-powered hover boards, aquatic hover boards, fly boards, hydro foiling - Unique one of a kind activities as exceptional and expensive forms of vigorous, outdoor, adventure or cultural tourism, and direct encounters with - Nature: observing penguins, bears or wild flowers; hunting wild game; cold water fishing, cold water bird watching, visiting parks, mud flat hiking, cold water diving) - History: whaling stations, abandoned mines, battle sites, research stations, explorer routes) - local culture: indigenous people, their lifestyle and artefacts - Gamification & festivalisation: organise races, competitions, one-day events or multi-day festivals e.g. for sailing, ice skating, ice racing, triathlons, iron man competitions - Offer self-guided tours and routes as well as guided tours and routes, making use of local, specialized knowledge



Tourism and Nature

Key Market Trends and Important Implications for SMEs

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