



# Tourism and Nature

Key Market Trends and Important Implications for SMEs- Fact Sheets

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## CYCLING TOURISM

*Cyclists generally enjoy being close to nature and are sensitive to the qualities of their environment. They have an increasing demand for high quality cycling infrastructure networks: designated routes and tracks, good road surfaces, clear route signage, route maps and, information about maintenance shops. For them, cycling is often seen as form of sport or physical exercise. As such, bicycles are not just a means of transport, but an integral part of the travel experience. Cyclists can get competitive and share performances via apps such as Strava or Runkeeper. A challenge is to create infrastructure networks by connecting long distance bicycle routes to shorter routes to increase traffic of the overall network*

## CYCLING TOURISM

### Market profile

Cyclists are slightly more often male, most often aged between 40-60. They are relatively highly educated, have relatively high-income levels and travel most often in couples or small groups. Cyclists tend to arrange travel and accommodation themselves, making increasing use of online research. Cyclists have a high interest in self-guided tours, e.g. making use of maps, existing routes, and apps such as Strava / Runkeeper. There is a growth of diversification in terms of types of bicycles, multi-activity combinations and multi-modal travel

### Selection of business opportunities:

- Emerging activities: fatbiking, MTB, e-biking, cargo-biking
- Rise of bike sharing and rental for recreational cycles, to special activity bikes to (semi)professional
- Multi-activity combinations: for example, bicycle trips are also increasingly added to city trips as one-day excursions, or longer.
- Multi-modal travel: boat & bike tours, train & bike, bus & bike
- Events for professional cyclists that attract visitors to events are aimed at active participation of non-professional cyclists.
- Cycling-friendly accommodation: bicycle storage; drying room; repair room; cyclist breakfast; information about routes and facilities in the locality, knowledgeable guides
- Theming bike tours: art, culture, nature, heritage, bird watching, local products
- For (semi)-professionals: high end retreats, high level of comfort/luxury, training facilities and training camps, with professional guidance.

### Possible partners

- Local and/or regional DMO for marketing activities
- Local Government for infrastructure provision and maintenance
- Online platforms, online self-organized communities
- Fellow entrepreneurs to create service value chain
- Event organizations

### Selection of highlights

- 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
- Cyclists combine cycling with other (adventurous) activities, wellness experiences, cultural holidays, and gastronomic offers (local products)
- Increasing number of electric bicycles, or e-bikes
- Diversification in types of bicycle: tour bikes, racing bikes, MTB, tandems, e-bikes, cargo bikes, long distance bikes, fat tires



## BIRD WATCHING TOURISM

*Bird watchers are highly interested in nature and have a high awareness of sustainability and their possible impact. They are the type of do good, feel good tourist and pursue purposeful travel. Bird watchers as sustainable tourism; They form strong communities, locally and internationally, both offline as well as online. Bird watchers pursue purposeful travel. Generally bird watchers' primary objective is to see as many species as possible and species you can't see elsewhere, sometimes driven by the fear of missing out (FOMO) – the limited or last chance to see particular unique or endangered species.*

## BIRD WATCHING TOURISM

### Market profile

Bird watchers are relatively highly educated with, relatively high income. They generally travel as individuals or couples. There is an emerging market for group travel for singles. In terms of age, it ranges from elderly to youngsters. Bird watching is traditionally associated with an older public, whilst it is increasingly popular among millennials. European travellers are increasingly interested in wellness, including mental wellness, as they look for an escape from their busy daily routines. In the United States bird viewing and photography is the most steadily growing recreational activity. Internationally, there are an increasing number of birdwatchers that are traveling to long haul destinations to spot new birds that cannot be seen in their own country or region. Birders increasingly use birdwatching applications (apps) on their mobile devices.

### Selection of business opportunities:

- Increase of group travel for singles
- Bird photography activities: set out routes, guided tours, master classes
- Multi-activity travel: bird watching and walking, kayaking, architecture, culture, gastronomy.
- In bird watching there is the trend of multi-generational travel
- Education & training to enhance bird watching skills
- Use the hype: unique species create an instant flow of large numbers of visitors
- Ensure Corporate Social Responsibility (CSR): make use of local goods, services and support local conservation projects

### Possible partners

- Bird associations: market accessibility
- Online platforms for bird watchers: market accessibility
- Local governments: protection of habitats, stimulate designer bird observatories (point of interest and visitor management tool).
- Film industry: movies and documentaries as marketing tool
- Cooperate with local stakeholders: create local value chains

### Selection of highlights

- Bird watching becomes popular among millennials
- Europe has several hotspots:  
Wadden Sea Region (NL, DE, DK),  
Danube (Central and Eastern Europe),  
Camargue (FR)
- Still few providers active on the European continent compared to other continents.
- Festivalisation: number of festivals featuring birds is growing exponentially



## KAYAKING TOURISM

*Kayaking is regarded as healthy and an environmentally friendly way of sightseeing and touring. It is also associated with fitness benefits. Generally kayakers are driven by an interest in alternative ways to explore and experience places and sites. The tranquillity of water bodies allows them to escape hectic (urban) life. There is an emerging differentiation in terms of locations where kayaking is offered: available widely from urban areas, rural, remote to natural areas. As such there are many but often focussed suppliers addressing niche markets.*

## KAYAKING TOURISM

### Market profile

The market for kayaking is on the whole rather large. Many people are interested in kayaking bringing an alternative way to explore places, from urban areas, to nature areas to remote places. It is an affordable activity for many and therefore popular amongst families. For these travellers, it is a side activity in a trip with different purpose. Niche markets exist for dedicated kayaking holidays. These may also include long haul, multi-day trips.

### Selection of business opportunities:

- Niche market for dedicated multi-day kayaking trips
- Gamification: kayak events, objectives along routes and tracks,
- Educational elements: history, geology, nature, wildlife, natural values
- Make combinations with other enriching activities: nature, wildlife, architecture, tranquillity, adventure, adrenaline.
- Add unique elements to trips: camping, access to remote places, access to places only reachable via water.
- Guided all-inclusive tours of several days, full board, full service; but also self-guided tours
- Serious kayaking: boot camps, training camps for skill improvement

### Possible partners

- Park management organizations: accessibility to water bodies
- Governments: permits for use of water bodies
- Cooperate with local stakeholders: create local value chains

### Selection of highlights

- Kayaking is often done as a side activity during a holiday, not as a main purpose of the trip.
- Niche market for dedicated multi-day kayaking trips
- Diversification: long and short activities, tours, day tours, short distances, long distances.
- Kayaking faces increasing competition since new water sports activities are on the rise



## HERITAGE TOURISM

*Tourists are interested in seeking authenticity. Increasingly, people seek and search for a sense of belonging: a personal connection to a site instead of a connection to the history and objects. As iconic places become more and more popular, and people are fed up with overtourism, they are more open to alternatives. There is a market for staged authenticity and tourism imaginaries: tourist are expecting certain types of tourism products and activities related to history and heritage, even it is purposefully augmented and therefore historically not completely correct.*

## HERITAGE TOURISM

### Market profile

There is a large target market for heritage. Bookings for experiential tours are rising, by people seeking more than just a site visit or guided tour. Heritage is utilized and integrated into the design of experience for visitors. Visitors increasingly expect that this is the case, and quickly it becomes the norm. Pensioners are more open to in-depth knowledge on history and cultural heritage and partake more often in study tours.

### Selection of business opportunities:

- High service level: luxury boat trips, luxury coach trips, full board trips
- Festivalisation: Living History, reenactments for entertainment and educational purposes
- Divert visitor to (still) less frequently visited, more unique, authentic places
- Themed tours and packages (e.g. Hanseatic route) is a mature trend, but new themes and packages are constantly found and bought. Combine logical combinations such as nature & architecture (“Dunes and Delta works tour”)
- Staging authenticity and creating tourism imaginaries: tourist experiences that are made up especially for tourism purposes
- Digital Heritage Experience: virtual reality environments, augmented reality layers enabling viewing of history in situ, maps, videos and 3D reconstructions
- Creating edutainment experiences: crossover of educational goals and entertainment forms.
- Use of apps for information, augmented reality and virtual reality to enrich experiences, gamification, smart museums
- Utilize intangible heritage: live with locals, local cuisine, local habits and customs
- Engage in adaptive reuse of heritage sites/historical building to create unique places to visit and stay

### Possible partners

- Wide range of suppliers: from museums, former as well as operational factories and farms, cultural organizations and associations, microbreweries.
- DMOs: identify, brand, develop and market unique selling points (USP) and icons related to natural, built and cultural heritage.
- Stimulate peer-to-peer marketing and crowd sourcing: stimulate visitors to share their experiences and content with their peers
- Communities and associations: access to (niche) markets, reviving heritage via historical research to identify items in order to create tourism products.
- Governments: access to and support for heritage (re)development, pursuing EU funds
- Cooperate with local stakeholders: create local value chains

### Selection of highlights

- Increasing interest in local identity, local DNA, local sense of place
- Diversification in heritage tourism: built heritage, cultural heritage, industrial heritage, intangible heritage, dark tourism
- Adoption of new technologies (wearables, mobile devices) and their applications for instance via augmented reality experience
- Experiential tours: local cultural heritage told via individual stories, feelings, emotions, being immersed, surprised, excited



## WALKING & HIKING TOURISM

*In today's society there is an emerging 'wanderlust': more and more people go for short walks and long-distance hiking. When managed well, it has a relatively low impact on the environment. People tend to stick to paths and routes when routing and signposting is clear. The interest in pre-defined walking routes can lead tourists to less visited areas of the destination. A challenge is to ensure enough 'traffic' on routes to have a critical mass that makes it economically viable to create and design services for tourists, via a dense and well-developed network of short distance routes and long-haul routes.*

## WALKING & HIKING TOURISM

### Market profile

The walking and hiking market shows diversification: from short leisure activity by residents to multiday journeys by guests. Often walkers and hikers travel in relatively small groups, frequently as a family or group activity. There is a market for walking long distances (trails, pilgrimage, trekking) and therefore the integration of accommodation provision and side activities into packages and tours. On the whole, walkers and hikers have a high interest in self-compiled and self-guided tours. There are marketing opportunities for activities that enhance experiences and increase service levels.

### Selection of highlights

- High expectations regarding experience: outstanding scenery, unique site and places, low traffic, high safety, good signage
- Importance of enhancing experiences
- Multimodal travel: drive & hike, rail & hike, cycle & hike, sail & hike.
- Adopting technologies: app-guided pre-defined walking routes

### Selection of business opportunities:

- Create and offer themed trails: wine, literature, film, history, art, etc.
- Private guided customized journeys
- Target solo travellers to join group tours
- Festivalisation: create special events that allow access to normally not available routes, a normally closed area, a normally non-existing competition (e.g. stand up paddleboard races, trailrunning races, mud runs)
- Seek niche markets within walking/hiking: snowshoeing, bare foot, beach walks, beach clean-ups.
- Enhance experiences: visit a working farm, a cheese making factory,
- Enhance experiences by walking with animals e.g. dog, donkey, horse, llama, herd of sheep

### Possible partners

- Governments: funds for infrastructure, itineraries, routing, signposting
- DMOs: identify, brand, develop and market unique routes and networks
- Cooperate with local stakeholders: create local value chains





## FOOD & DRINK TOURISM

*The food industry is booming business. As societies become wealthier, people set new demands for food. It is quickly becoming the new norm to have a good range of biological and local produce on the menu as well as a range of vegetarian and vegan options. In turn for their increasing demands, consumers show a willingness to pay based on their understanding of increased costs. Moreover, there is a relatively high willingness to travel for unique offerings. Potentially, food is the main driver for a visit to a destination (e.g. in case of Michelin star-ranked restaurants). Here, there is a possibility to motivate visitors to visit more unknown, peripheral locations due to exceptional quality or a unique offer. The hotel industry is tapping into gastronomy.*

## FOOD & DRINK TOURISM

### Market profile

Millennials are the driving force behind culinary tourism. These culinary tourists see gastronomy as a means of socialization. Their spending behaviour is above average. They are also more demanding than an average tourist and tend to reject uniformity. Currently there are various signs of behavioural trends that affect food tourism such as less meat consumption, more greens, more vegan, more local produce.

### Selection of highlights

- Search for authenticity in food and the social context in which it occurs
- Combine culinary tourism trends like ecotourism, adventure tourism, wellness etc
- Food experiences are suitable for SMEs as it builds on local culture, resources and skills and relatively low investments are needed (foodtrucks, foodstalls, street food etc.)

### Selection of business opportunities:

- Increasing interested in themed, specialized tours e.g. heritage, floral and garden, women only, BBQ, raw food, wild food, seafood.
- 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, whisky, beer, chocolate, etc.
- Tours visiting local suppliers: farms, factories, breweries, gardens
- Seed-to-plate-holidays: gardening, hunting, picking & cooking
- Cooking (multi-day) holidays focussing on making local dishes, cooking courses
- Winter culinary events
- Platforms such as "Airbnb experiences" provide market accessibility.
- Festivalisation: pop-up food events, pop-up food trucks at hotspots of tourism flows.

### Possible partners

- DMOs: turn to intangible heritage such as gastronomy for product diversification
- Influencers: food bloggers and vloggers with special interest target audience
- Media partners: online and offline magazines able to target special interest audience
- Cooperate with local stakeholders: create local value chains

## FISHING TOURISM

*Fishing tourism aligns with an interest in a sense of rawness, particularly open seas and remote places. For many anglers, the primary objective is to catch particular type of fish, types of species you can't see in other places. As such there is a fear of missing out (FOMO): limited or last chance to catch particular fish. For some, 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, importance is also being amongst friends, people from the fishing community. The market supply for fishing tourism exhibits a wide diversity and variety: from the cold waters of Norway to the warm waters of the Mediterranean, from highly professionalized sea fishing to recreational trips.*

## FISHING TOURISM

### Market profile

The fishing community is very large (when fishing as recreational activity is included, many people have fishing licences) and shows a strong sense of community. On average, the people that embark on a holiday dedicated to fishing or including fishing as an activity is relatively highly educated and have relatively high-income levels. Prior to and during their trip, people invest in fishing gear, boat rental, accommodation, sometime local guides/experts, overnight accommodation, gastronomy.

### Selection of highlights

- Combines well with gastronomy: trips to harbours, fish auction, suppliers, fish restaurants
- Variety of organized boat tours: hourly trips, day trips, multi-day trips.
- Emergence of alternative types of fishing: magnet fishing to catch metal objects, trash fishing to help clean up water bodies.

### Selection of business opportunities:

- Target the professional anglers: unique locations, unique fish, high-end quality material and comfortable accommodation in an all-in package.
- Packaging: combine trip, stay, tours to one of multiple locations for one or multiple types of fish
- 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)
- Professional industry reaches out to tourism and recreation: offering accessibility to ships, industries, by means of activities, tours, shops and restaurants
- Volunteer tourism (voluntourism) as niche market: assisting in fisheries, on boats and refuges (incl. seals)

### Possible partners

- Communities and associations; market access
- Governments: permits and licenses
- Influencers: bloggers and vloggers with special interest target audience
- Cooperate with local stakeholders: create local value chains





## COLD WATER TOURISM

*The visitors that engage in cold water tourism seek unique places and unique activities, being experienced travellers that have visited hotspot already and/or are looking for non-frequently visited places. They show an interest in adopting water sport activities that are relatively water temperature independent: e.g. stand up paddleboarding, kayaking, canoeing, rowing, surfing, kite surfing, pedalo, boating, yachting, cruising as well as the adoption of new emerging activities (see business opportunities). 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. Emerging destinations in cold water tourism: Antarctica, North Pole.*

## COLD WATER TOURISM

### Market profile

The category of cold-water tourism includes many aspects, being very diverse and attracting an equally diverse visitor group. The activities related to cold water tourism are in line with many interests of visitors, though the market is not as large as sun & beach tourism. Visitors choose consciously for cold water tourism and know what they get themselves into, making market demand less prone to weather conditions.

### Selection of highlights

- Rise of new watersport tourism activities: kite surfing, stand up paddleboarding, jet-powered hover boards, aquatic hover boards, fly boards, hydro foiling
- Traditional watersport activities show decline locally: sailing, surfing, yachting
- Prevailing weather conditions are 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.

### Selection of business opportunities:

- 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).
- Cruise operators include cold water destination in their tours and packages (e.g. Baltic Sea)
- Water temperature independent activities: kayaking, canoeing, rowing, surfing, kite surfing, pedalo, boating, yachting, cruising.
- Seek opportunities in boating: traditional sailing ships (e.g. Clippers), river cruises (including bike & boat concepts), yachting (larger, luxury boats mooring at marinas), jet-powered boats (adventure and adrenaline sports)
- Tap into the trend of temporary usage (renting, sharing, leasing) over ownership.
- 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
- 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.
- 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

### Possible partners

- Local and/or regional DMO for marketing activities
- Cooperate with event organizers
- Cooperate with local stakeholders: create local value chains





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