

Forest tourism

ON NATURE'S TERMS

Northern European deciduous forests are unique in a number of ways. In addition to being home to beautiful nature reserves, national parks and popular hiking trails, these forests are also an important asset to thriving rural communities.

With the forest as a base, there are plenty of opportunities to develop the tourist industry and strengthen nature tourism operators that are already in business.

Welcome to our beautiful broad-leaved deciduous forests.

Foreword

Tourism is one of the world's fastest growing industries with millions of people employed globally. According to the United Nations World Tourism Organization (UNWTO), in 2017 international tourism generated USD 1.6 trillion in export income, with the northern European market growing at an annual rate of 5.5 %. The same figure for Europe as a whole was higher with an annual growth rate of approximately 8 %. The reason for this difference is unclear.

With its vast forests, untouched waterways, popular hiking trails and rich flora and fauna, there is a lot to be said about the natural environment in the Attractive Hardwoods project area (Sweden, Poland and Lithuania) having a wide range of qualities suitable for a strong nature tourism industry. Already today, demand is growing for nature-based and culture-based experiences and Sweden, Poland and Lithuania have the ingredients required for the successful development of nature tourism in the southern Baltic region.

Despite Swedish, Polish and Lithuanian nature having unique – and in places totally different from each other – conditions suitable for sustainable development, it has primarily been the large cities in these countries that have seen growth in tourism since the turn of the millennium. Rural areas have, on the other hand, only seen low levels of growth, which strengthens the need for measures that assist entrepreneurs with a focus on nature, the environment and sustainability. It is also important to facilitate local, national and international cooperation between operators so they have incentives and opportunities to offer a greater range of activities and services for returning tourists.

It is a known fact that it is easier to get satisfied guests to return to an area than it is to create totally new relationships with potential guests who have never been to the area before. For this to be possible, good transport links, professional guides, bookable packages and accommodation

and restaurant facilities in varying price classes are required. In addition, well-cared-for nature and well-organised infrastructure supporting outdoor life are also necessary.

What is nature tourism?

Nature tourism is a phenomenon building on a person travelling to a place outside his or her home environment for nature experiences that are both economically viable and socially possible to take part in without causing any detrimental effects for the natural environment or the local culture they are located in. (Peter Fredman, ETOUR Sweden). The Attractive Hardwoods project uses the same definition as that used in the National Nature Tourism Strategy from 2018 (Sweden).

"Nature tourism is transferred consumption in the form of activities, accommodation, dining and other tourism services that are based on nature experiences."

Nationella Naturturismstrategin 2018

What is eco tourism?

Eco tourism is a sub-set of nature tourism. This means that all eco tourism is nature tourism, but not that all nature tourism is eco tourism. Nature tourism is therefore not the same as eco tourism.

"Eco tourism is responsible travel that contributes towards the protection of natural environments and the wellbeing of local communities."

The International Eco Tourism Society

Northern Europe's light, birdsong and beautiful forests

Experiencing nature is in no way a part of everyone's everyday life. Despite many people living relatively close to areas of natural beauty, only a limited number actually make the effort to spend hours, days or weeks in the outdoors.

Creating the conditions needed for nature tourism to develop is not only a question of attracting tourists from near and far, it is at least as much of a challenge to get the local population to see, understand and become fascinated in nature and all its possibilities and to invest time and money in an active outdoor life, either as part of a group or alone.

Opportunities offered in rural areas

A strong nature tourism sector strengthens not only rural based companies but also gives a good foundation for joint initiatives and different forms of investment. Despite being home to suitable conditions for tourism, the tourism industry in rural areas has lower turnovers, added value, number of employment positions and growth than cities.

There are good examples, however, such as in Swedish Lapland, where the provinces Västerbotten and Norrbotten have shown impressive growth since 2010 (58 %). This has also caused positive knock-on effects outside the region, in particular in the capital as tourists stop and spend time and money in Stockholm or another suitable city on their way to/from their destination.

An important aspect for the future of nature tourism is good accessibility to beautiful, untouched nature. However, national parks and untouched forests are not essential requirements, rather it is good service, good

transport infrastructure, well maintained hiking trails and professional guides that are seen as important. For an arriving tourist, it is not only the protected biotopes found in ancient forests that are the deciding factor for travelling to Sweden, Poland or Lithuania, it is also the possibility of getting out into nature in an organised manner to enjoy the forest.

Those who do want to explore key biotopes or specific tree species can visit the national parks, nature reserves and biotope protection areas in the project area.

Nature's positive effects on health

Apart from lowering your blood pressure, pulse and the amount of stress hormones in your bloodstream, experiences in nature make people more at peace within themselves. We quite simply become healthier, happier and kinder when we spend time out in nature.

Research shows that children who spend time out in nature can concentrate on their schoolwork more, develop their motor skills faster and have better general health than their peers who do not spend time outdoors.

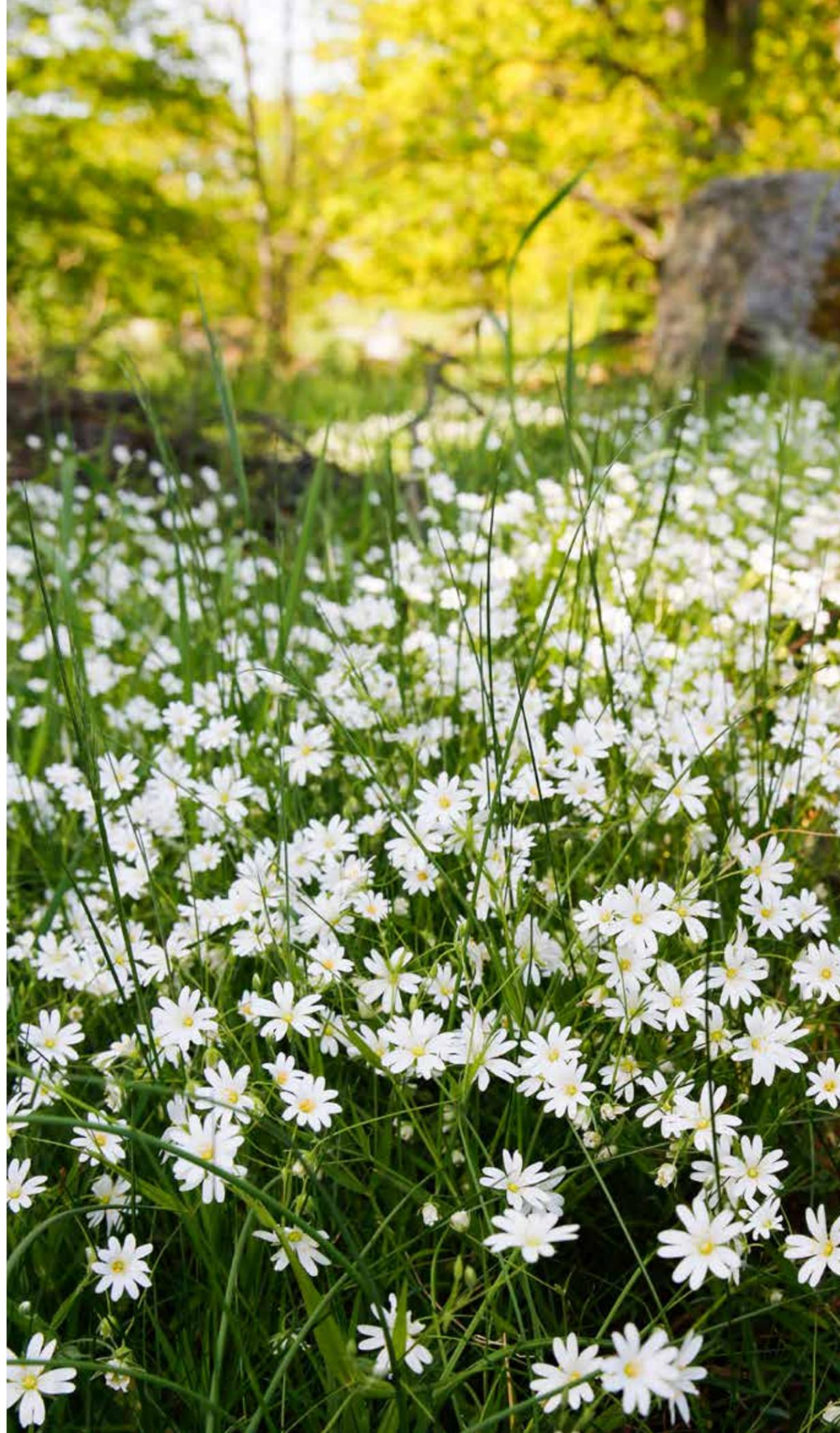
Simply being able to see nature from your window is enough to cause a number of health-enhancing effects. (Roger Ulrich)

Attractive Hardwoods, forests worth visiting – a prerequisite for active nature tourism.

Attractive forests are a fundamental prerequisite for nature tourism companies to build on by offering exciting nature experiences in forests worth visiting.

In subsistence farming communities in the past, farmers were responsible for their own livelihoods and broad-leaved deciduous forests provided important income for the farms. These forests supplied farmers with building material for houses and fences and wood to burn for heat. Animals grazed in the forests during the summer months so farmers could use the fields to cultivate winter feed.

In the late 1800s, a lot of broad-leaved deciduous forests were cut down and replaced with pine forests, which gave much better returns. Pines grow faster and are more adapted to suit the cold climate of the southern Baltic region. Today, remaining broad-leaved deciduous forests are a project area that is unique in all of northern Europe, where large oaks, beeches, ashes and elms grow all that way out to the coastline in some places. This is thanks to large landowners and manorial estates that have used these tracts for grazing and grasslands.



Goal for this area of focus:

Forests worth visiting with well-preserved high levels of biological diversity and experience value.

Steps to be taken:

- Identify and map attractive forest areas. Forest tourism on nature's terms involves identifying and making available areas that are suitable for nature tourism, but also managing damage and conducting dialogue between land owners, nature tourism companies and authorities. Some places are more suitable for certain types of activities than others, for example, species-rich natural environments can be suitable for bird watching, insect safaris and guided tours and areas of great natural beauty can be suitable for overnighting in tents, group camping activities or a *leave no trace* campsite.
- Create a care plan that takes into account biological diversity without hampering nature tourism's prerequisites to visit the area. Care for and process the value of the forest and use the forest with respect to the environment, its character and conservation value.
- Follow up on the care plan and measures to be made and "inspect" the area regularly. Areas of great beauty become quickly overgrown if they are not used for grazing or maintained in other ways.

Tourist products – need for **organised activities** in forest and nature areas

Easily accessed nature is often named as a key reason why foreign tourists choose to visit Attractive Hardwoods forests. But having beautiful nature on offer is not enough.

What is also needed is professional operators offering comprehensive products either individually or in cooperation with each other. This is to facilitate tourists during their time here and to make outdoor life easier, safer and more service minded. It is true that not all tourists want to go hiking with a guide, but many need the assistance of operators who offer services in areas such as baggage transport, accommodation and food.

In order to enhance the area's attractiveness while simultaneously making the tourism branch more professional, a large amount of

work is required to increase the number of operators offering nature tourism activities in the area. In addition to the traditional accommodation, restaurants and transport companies, operators offering niche products are also needed, ultimately with both shorter and longer activities lasting from several hours to several days included. Examples include guiding and equipment rental companies that offer experiences such as hiking, climbing, guided kayak outings, biking, bird watching, hunting and photography. It would be advantageous if these products could be offered in several languages.

Goal for this area of focus:

An attractive nature tourism sector that can offer sustainable, high-quality experiences.

Steps to be taken:

- A good example is to look at the tourism industry as an eco system where several smaller guiding companies work together with larger companies in the hotel and restaurant branches to attract new and returning client groups. Initiate meetings and workshops where companies and organisations can meet and discuss new forms of cooperating with each other.
- By drawing up cooperation contracts between companies, even smaller companies can guarantee good booking terms and conditions and sell activities involving just a small number of participants; something that can be particularly necessary in the early stages. In the same way, larger companies can make use of smaller companies' niche competences and offer specially designed packages to demanding, high-budget client groups.
- Map out visitor needs and wants. In order to understand nature tourism's prerequisites and the needs of tourists, a good ability to analyse the needs and wishes of guests is necessary. What is actually required? What type of activities do guests want and is there a need for guests to rent equipment, transport baggage and travel by public transport? In addition, should we investigate what kind of duration guests are interested in and if they want to use guides or not? It is first after we have some answers regarding what will be offered and how many people to expect that activities can be developed to match the needs and wants of tourists in relation to process and scope.



Goal for this area of focus:

Good accessibility and services around the natural area and hiking trail system.

Steps to be taken:

- Develop public transport on demand – a form of scheduled public transport that only runs when visitors order it, so they can be transported between different nature areas or other points of interest. Visitors need to be able to pay by both card and cash to assist cross-border tourism. It needs to be flexible and user friendly.
- Cooperation agreements between municipalities, organisations, companies and tour operators. To be able to improve services at tourist destinations, drinking water needs to be available as well as rubbish bins, clean toilets and the possibility to purchase food. Encourage organisations that want to take responsibility to create supply lines and care plans together. Facilities should be serviced daily.
- Develop a signpost system and have information signs in several languages. Make it easy for visitors to understand and follow information that is made available. Consider using QR codes for easy access to information in other languages or for visitors to search for more reference material and information on the internet.



Exceptional infrastructure – more services are needed around the forests' core areas

In order to be a successful outdoor destination, in addition to offering unique products and forested areas worth visiting, exceptional levels of service are also required, including public transport and well-marked hiking trails with all the services hikers and birdwatchers expect to have access to – such as good transport, accommodation, restaurants and knowledgeable guides.

In today's world, sustainability, an environmental focus and "green values" are important parameters for many tourists choosing a travel destination.

For some people, being able to take public transport to a destination without needing to fly is a deciding factor, while others expect to have a decent sized airport close to their final destination. People also demand good access to transfer connections, rental cars and taxis.

PR, marketing and communication. Find a way to meet and communicate with tourists.

In today's high-tech world, it is necessary to build a relationship with tourists based on trust, content, professionalism and inspiration. It should quite simply be pleasant to visit a specific area, and the aim is for reality to beat expectations.

From a marketing perspective, in particular in new markets, when targeting a new client group it is important to select a limited number of markets and be clear with the feeling, product and content that you want to convey.

Getting to know the client group and aiming to emphasise cooperation and export-mature products with a strong presence is a good way to strengthen the image of a destination. Visiting the southern Baltic region has to have a clear, appealing image.



Goal for this area of focus:

A strong digital presence that strengthens the image of the Baltic Sea region's nature areas.

Steps to be taken:

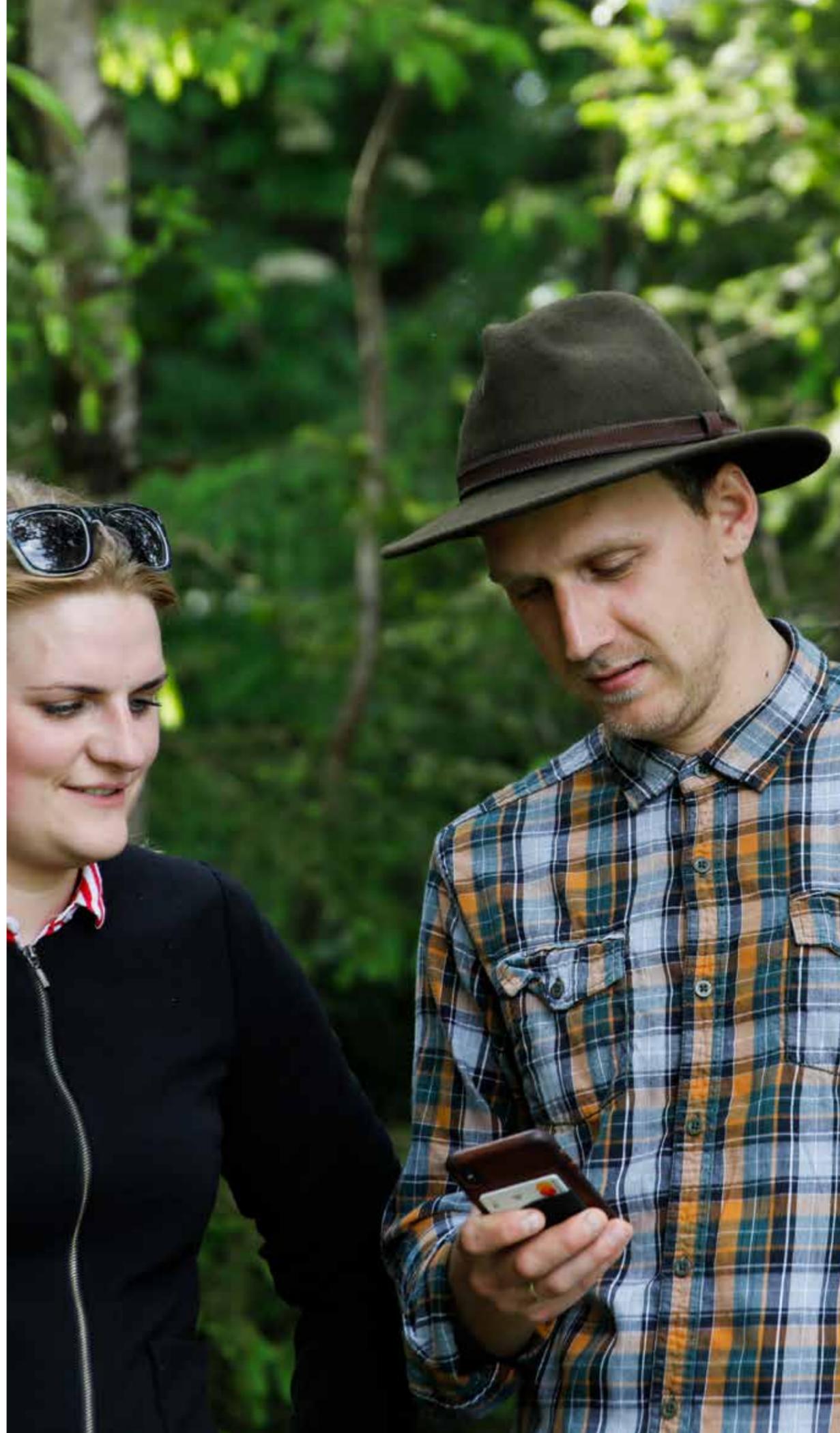
- Use social media platforms to communicate with client groups. Make the digital presence possible to share, and invest time, money and other resources into online digital marketing. Create a relationship with your clients and share images and written content on a limited number of carefully selected social platforms. Make sure you address comments and answer questions that arise in different threads and discussion forums.
- Create *genuineness* in your communication. We keep our promises! Focus on things that you can guarantee. Nature's vastness, great system of hiking trails, clean water and unique opportunities to experience silence, solitude and the forest's presence.
- How do we want to be perceived? Convey and strengthen the region's unique core values. We don't have towering mountains, enormous alpine views or clear-cut forests; instead we have grand broad-leaved deciduous forests with a rich biological diversity close to services and other infrastructure. It is easy to get to the southern Baltic region and just as easy to get into the forest once you are here. Draw attention to the places that are easy to visit with profile activities that suit the target group.

Competence assurance and the need for training.

Having well-trained staff with good, continuous competence training is essential in both the short and long term.

No one wants to pay for experiences that are not up to standard, in particular not in the premium segment of the international market. However, people are happy to pay for experiences provided by professional operators with well-documented track records. Read client evaluations carefully and make improvements continuously.

Good activities of course cost money, so a well-formulated and worked-through plan is needed to staff activities and guarantee competence in the long term. Schools offering nature guide programmes also need to incorporate more business, marketing and branding elements into their courses to encourage the growth of new nature tourism companies in a global market.



Goal for this area of focus:

Good availability of well-trained personnel.
Good cooperation between academic institutions and companies.

Steps to be taken:

- Guaranteeing competence and perseverance in one of the world's strongest branches (tourism) is challenging. In particular for small companies, as the tourist season is short and you need to have another source of income during the winter months. A good way of securing staff is to work together with other operators in other parts of the country who need staff during the seasons when you do not, e.g. ski resorts.
- Work together with other companies and see competitors as partners instead of competition. You can then use each other's personnel when bookings are high and attract larger groups and more demanding guests by building up a platform together. Several small companies are stronger than one big one.
- Develop the ability to create certificate and educational platforms. Encourage further training and offer to assist with financing, support and references when personnel want to go on courses or to build competence for themselves or the company.

Goal for this area of focus:

Good understanding of the development potential of the nature tourism branch.

Steps to be taken:

- Explain what different investment grants involve. Be clear and describe what EU financial aid is available. Simplify communication between creditors, government authorities, municipalities and nature tourism companies.
- Strengthen the possibility to co-finance investments and encourage companies, associations and organisations to work together. Through comprehensive cooperation, more small companies can together generate successful solutions without each company needing to take larger loans or risks. Cooperation makes everyone strong.
- Examine how other regions, projects and companies have solved their financing issues. Take part in study visits and build networks. These steps will greatly improve your chances of success.



Financing, investing and capital needs

For small entrepreneurs, access to capital is often a deciding factor for a company's survival.

In many cases, an initial investment is necessary for materials, infrastructure or buildings before you can even get started. Without your own money it can be difficult or even impossible for get a bank loan, support and start-up funding for a new company.

In addition, banks and investment companies often lack knowledge of the nature tourism industry, which means that risk analysis and rate of repayments are deemed to be low, despite the nature tourism company calculating a faster repayment plan.

Often, loans are relatively small so the banks do not need to take big risks to support them.

The road to success.

Creating a successful nature tourism sector takes time and is dependent on a number of different factors.

Beautiful nature worth visiting is the basic requirement, but entrepreneurs with clear goals who are not scared of hard work are also needed to create success.

In many cases, the recipe for success is right in front of us and we don't even know it is there. It is easy to be blind to home flaws and just as easy to miss success due to being blind to things that others see as exotic. Succeeding requires curiosity and the ability to see possibilities when everyone else sees obstacles.

It's a good idea to make use of each other's competence, to interview visitors and to develop strategies for reaching success together with other entrepreneurs and business developers both in the same and in other branches.

A good example

Birdwatchers' picnic in Elblag, Poland.

Right before the end of the bird watching season at Vistula Spit outside Gdansk, a bird watchers' picnic is organised where visitors who do not usually engage in bird watching are invited to the region to meet operators, companies and hotels active in the area. In addition to lengthening the season, the event attracts new contacts in the form of people who have never previously watched birds or visited a bird-watching area.

Fornhaga Iceland Horses and Hälleviks Camping, Sweden.

Several times each year, Fornhaga Iceland Horses and Hälleviks Camping organise activities together. Their guests ride horses, eat lunch in the forest and spend the night at the campground after they have been swimming, had a sauna and enjoyed a barbeque dinner before riding back to the stables the following day. In addition to the two companies working together with the same clients, the horse riding company does not need to build its own accommodation while the camping company can rent out accommodation and sell activities in the low season.

Autumn festival in Žemaitija National Park, Lithuania.

In the autumn, Žemaitija National Park organises a festival with a theatre theme. For an entire day, children play together with a number of fairy tale characters at Plateliai Farm. The children are introduced to the mysteries of the forest through play and learn all about the national park's different animals, plants and trees.

Needs and access create attractive activities.

The need for coastal meadows for grazing is significant in the Blekinge Archipelago and to be able to preserve the biological diversity in the region, small-scale farms that monitor their stock on a daily basis are needed.

In order to strengthen rural areas through diversification, paying guests are an excellent solution that can make a labour intensive branch financially viable. If these two factors are combined: For a family or a group of friends from Berlin or Stockholm's inner city, a week looking after animals is nothing short of an exotic opportunity to live close to animals in a traditional manner on a beautiful island or right where the forest meets the sea.

Development potential: Add breeding information and let guests milk goats and make their own cheese. Different kinds of accommodation can also be offered close to where the animals graze, in cooperation with other parties renting out accommodation to create a strong, sustainable local network.

A good example – The Swedish Number – The phone number that anyone could call and all Swedes could answer.

By creating a unique number that anyone in the entire world could call to talk to a randomly selected Swede registered with the system, the Swedish Tourist Association managed to create direct communication with almost 190,000 people through telephone conversations.

The telephone number was active for 79 days and the PR value was equivalent to €120 million.



The forest is calling

Things will happen now. Where do **we go** from here?

After three years with Attractive Hardwoods, it is possible to summarise experiences and think about how the project's results can be of use to others.

Common to all of us is that we have managed to position the potential of nature tourism in the southern Baltic Sea and succeeded in getting operators of a wide range of businesses to meet, discuss and create exciting visions for the future. It is now that nature tourism will start to gain momentum in the southern Baltic region.

The insights and knowledge that the project has generated will be continuously distributed further afield and used as a foundation for future projects, companies and cooperation agreements. Thanks to the workshops, training programmes, study visits and lectures, a strong interoperability has developed both nationally and internationally, which has led to improved quality and the start of a long-term building of capacity.





Attractive Hardwoods is a cross-border project in the southern Baltic region that aims to increase the profile and number of tourists visiting the northern European broad-leaved deciduous forests located around the southern shores of the Baltic Sea.

Participating partners

The Swedish Forest Agency, County Administrative Board of Blekinge, Blekinge County Council. Directorate of Žemaitija National Park, Regional Directorate of State Forests in Gdansk and Pomorskie Tourist Board.

Poland: Regional Directorate of Environmental Protection in Gdansk.

Sweden: Visit Blekinge AB, Blekinge Arkipelag, Ronneby Municipality, The Scanian Landscape Foundation.

Associated partners:

Lithuania: Samogitian Rural Tourism Association, Lithuanian Fund for Nature, Plunge district Municipality, Telšiai State Forest Enterprise, State Service for Protected Areas under the Ministry of Environment.

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A collaboration between

