

**STRATEGY FOR THE FUTURE  
SUSTAINABLE TOURISM  
DEVELOPMENT  
OF THE CARPATHIANS**







# **STRATEGY FOR THE FUTURE SUSTAINABLE TOURISM DEVELOPMENT OF THE CARPATHIANS**

**CONSULTATION DRAFT  
FOR THE  
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The country experts from every Carpathian country as per below have organized consultations with numerous stakeholders who provided their input for the elaboration of the first draft of the strategy.

1. Czech Republic – Eliska Balharova, Centrum Veronica Hostetin
2. Hungary – Imola Füzi, EISD / Stefan Szabo, Ekocentrum SOSNA
3. Poland – Monika Kotulak, Naturalists Club
4. Romania – Andrei Blumer, The Association of Ecotourism in Romania
5. Serbia – Ivan Svetozarevic – Tourism business
6. Slovak Republic – Zuzana Okanikova, OZ Pronatur / Jan Rohac, Jantarova Cesta
7. Ukraine – Andrej Taras-Bashta, Associaton FAUNA

More than 400 individuals and organizations provided feedback during a number of meetings taking place throughout the project duration (consultation questions are in Appendix 1).

The inputs were collected by Martina Voskarova (ETE) and passed onto the strategy experts Laszlo Puczko (Xellum Ltd./Hungary), Andrei Blumer (AER/Romania) and Michael Meyer (ETE/Germany) for drafting the actual strategy. Katarzyna Sliwa-Martinez and Kristina Vilimaite from the partner organization CEEweb, among others, provided valuable comments for the development of the strategy.

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**Note: The acknowledgements are subject to change until the final draft version of the strategy in December 2013.**

## 2 INTRODUCTION

### 2.1 Rationale of the Strategy

The purpose of the Strategy is to highlight and and sustainably use the various attractions and assets for sustainable tourism development of the Carpathians. This mountain range covers a large part of Central and Eastern Europe and could become an attractive tourism destination that could contribute to the quality of life of the local population and to the protection of cultural and natural heritage. Seven countries share the Carpathians, each of them having a different approach to tourism development. They follow different strategies and use different methods, which can limit the expected positive contributions from and impacts of tourism to local communities. This strategy intends to harmonize and coordinate country-specific approaches by providing a common understanding and umbrella platform for planning and management.

The strategy is not a stand alone activity, it is part of comprehensive effort of 7 Carpathians countries' governments to harmonize and coordinate the use, protection and promotion of the Carpathians as a tourism (mega)destination. This effort is stipulated by the Carpathian Convention. The specific need for a common tourism strategy is defined in the Article 9 that determines:

- 1. The Parties shall take measures to promote sustainable tourism in the Carpathians, providing benefits to the local people, based on the exceptional nature, landscapes and cultural heritage of the Carpathians, and shall increase cooperation to this effect.*
- 2. Parties shall pursue policies aiming at promoting transboundary cooperation in order to facilitate sustainable tourism development, such as coordinated or joint management plans for transboundary or bordering protected areas, and other sites of touristic interest.*

In line with the objectives of the Carpathian Convention, the 3<sup>rd</sup> Conference of the Parties adopted in May 2011 the Protocol on Sustainable Tourism to the Framework Convention on the Protection and Sustainable Development of the Carpathians. In this Protocol, which is since May 2013 in force, the Parties decided in Article 27 (Implementation), Paragraph 3:

***The Conference of the Parties shall develop and adopt the Strategy on Sustainable Tourism Development in the Carpathians, which will accompany the implementation of this protocol.***

The tourism sector's competitiveness is closely linked to its sustainability, as the quality of tourist destinations are strongly influenced by their natural and cultural environment and their integration into a local community.

The sustainability of tourism covers a number of aspects: the responsible use of natural resources, taking account of the environmental impact of activities (production of waste, pressure on water, land and biodiversity, etc.), the use of 'clean' energy, protection of the heritage and preservation of the natural and cultural integrity of destinations, the quality and sustainability of jobs created, local economic fallout or customer care.

The bright future of the Carpathians as an attractive destination, which is able to compete on the international tourism market, will largely depend on the cooperation of all the

sectors (governmental, business, non-governmental) to plan, develop and manage this region in such a way that the existing natural and cultural resources are well maintained and that visitors from all over the world can enjoy a great experience. For creating these favorable conditions, this strategy has been elaborated and will build the conceptual foundation.

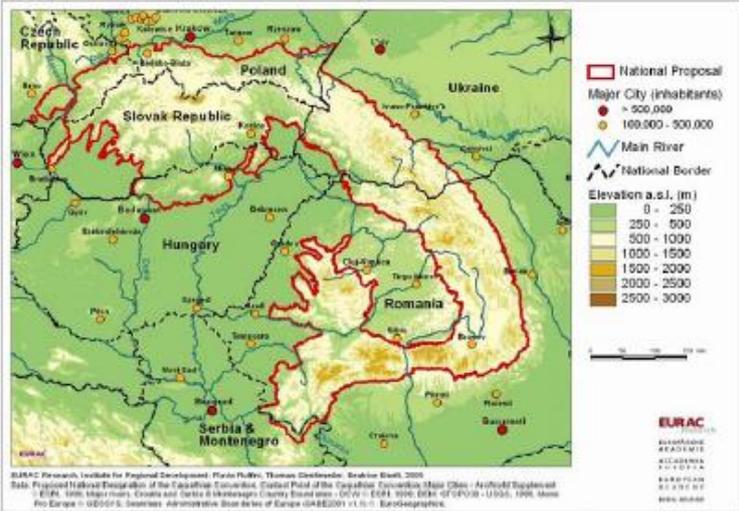
**2.2 Geographical scope and definition**

The Carpathians are currently home to an estimated 18 Million people. The region is shared by seven Central and Eastern European countries, five of which have already joined the European Union (EU). This increases the possibilities of sustainable development based on the rich natural, environmental, cultural and human resources of the region. Ties linking the Carpathian countries are noticeable in languages, music, similar tales, the characteristic small towns situated at the foothills of the range, their architectural styles, etc.

Looking at historical information, many of the areas in question have deeply rooted in a common heritage, e.g. Southeastern Poland and Czech Republic, Slovakia, Western Ukraine and Hungary have cultural and political traditions associated with Austro-Hungarian spheres of interest and trading partnerships. In the majority of those border regions, there are several environmental groups being involved in the process of sustainable (tourism) initiatives. They have built their own international networks and institutions, which are integrated into the cross-border activities through personal contacts, workshops and projects. Many of the initiatives were supported by EU funds, such as PHARE or INTERREG.

The Parties to the Carpathian Convention have not yet decided on the geographical application of the objectives and the protocols in force of the Convention. However, according to the results of the consultations with stakeholders in the seven countries during summer 2013, the interest has been expressed to enlarge the scope of application for the Carpathian Tourism Strategy to an area, which covers more than just the mountain territories of the Carpathians (Map will be provided after the CC-WGST consultations).

**Geographical map of the Carpathians**



## 2.3 Expected outcomes

Beside of major outcomes of this strategy in the mid and long-term, such as increase of visitor's experiences, multiple returns of visitors, increase of visitors stay and spendings, there are a number of tangible results foreseen when implementing the enclosed action plan:

1. A common brand is created for the destinations in the Carpathians.
2. All destinations in the Carpathians have an effective management and DMO following a set of sustainability criteria (tourist hubs).
3. An information system is established throughout the Carpathians providing data for monitoring and for visitors at the same time.
4. A number of products (STP – sustainable tourism products) are promoted at the regional as well as global tourism-related markets.
5. Carpathian service providers are successfully communicating to tourists the value of this mountain region based on a code of conduct.
6. Governments adjust their voluntary and legal frameworks for the support of sustainable tourism based on common assessments.
7. Products and services following common quality standards and are integrated into a labelling system.
8. A properly managed network of hiking trails is established by cooperation between Carpathian countries distinguishing between Carpathians wide and local destinations.
9. A Coordination centre for product development, promotion, marketing and monitoring is established and operating.
10. Network of ecotourism destinations is established.
11. Number of laboratories and incubators as learning institutions on sustainable tourism practices for providers and communities is established.
12. Governmental sectors support the proper sustainable use of authentic landscapes and wilderness areas with associated tourism infrastructure, which forms the foundation of any tourism operations.
13. Small and micro businesses are supported by organizational systems and incentive policies

## 2.4 Partners

### 2.4.1 Organizational partners

The following organizational partners can be highlighted regarding the adoption of the joint strategy:

Czech Republic	Hungary	Poland	Romania	Slovakia	Serbia	Ukraine
Ministry for Regional Development Ministry of Agriculture Ministry of the Environment Ministry of Labour and Social Affairs Ministry of Education, Youth and Sports Ministry of Culture Ministry of Transport  National parks, protected areas in the region	Ministry for National Economy (Tourism and Catering Department), Deputy State Secretary for Tourism Ministry of Rural Development, Ministry of National Development,  Directorate of Hungarian National Parks	Minister of Sport and Tourism Polish Tourist Organisation Ministry of Transport Construction and Maritime Economy Advisory Centres of Agriculture (Rural Tourism)  National parks, protected areas in the region	Ministry of Tourism Ministry of Youth and Sport Ministry of Labour, Family and Social Protection Ministry of Agriculture, Forests and Rural Development Ministry for Environment and Forests Ministry of Transport and Infrastructure  National parks, protected areas in the region	Ministry of Transport, Construction and Regional Development Ministry of Transport, Construction and Regional Development  National parks, protected areas in the region	Ministry of Economy and Regional Development  Public enterprise of National Park Djerdap	Ministry of Culture and Tourism State Tourism Administration of Ukraine  National parks, protected areas in the region

## 2.4.2 NGOs, Industry partners

Likely industry partners are those that have already partnered with respective National Tourism Offices (NTOs), and those, that have experiences in sustainable development projects (e.g. CEEweb).

Czech Republic	Hungary	Poland	Romania	Slovakia	Serbia	Ukraine
<p>Czech Tourist Club (network of hiking trails (41,100 km), cycling trails (37,000 km), trails for wheelchair users (80km for people with special needs) and riding trails (2,500 km) Czech Environmental Partnership Foundation), the Greenways activity, Asociace regionálních značek (Regional Brands Association), Sdružení vinařů (Association of Wine Makers), Česká inspirace (Czech Inspiration)</p>	<p>Hungarian Association of Carpathians, Ökotárs Association, Mátra Jövője Touristic Associations, FATOSZ (Association of Rural and agro tourism), Zöldutak Módszertani Szövetség (green ways), Levegő Munkacsoport (environment protection), "Nimfea" Environment and Nature Conservation Association</p>	<p>Carpathian Foundation Poland Polish Tourist Country-Lovers Society, Polish Youth Hostels Association, Polish Camping and Caravanning Federation, Polish Federation for Rural Tourism - Gospodarstwa Gościnne, Polish Hotel Trade and Tourism Association, The Conferences and Congresses in Poland Association, Association of Polish Spa Communities Polish Tatra Society Carpathian Heritage Society, Poland, Naturalists Club Polish Country Lovers' Society</p>	<p>Carpathian Tourism Cluster rural tourism (ANTREC), spa tourism (OPTBR), business tourism (RCB), ecotourism (AER) or different professions: tour operators and travel agencies (PANAT), hotels (FIHR), bed and breakfast (ARCTE B&amp;B), tourist guides (ANGT) Romanian Ecotourism Association Green Echoes Association Milvus Group</p>	<p>Slovak Tourism Association, Association of Hotels and Restaurants of the Slovak Republic, Slovak Association of Travel Agents, Bratislava Hotel Association, Lavex - cableways and ski lifts, Historical Hotels of Slovakia, Slovak Association of Rural Tourism and Agro Tourism Slovak Tourist Guides Associations</p>	<p>Centre for Responsible and Sustainable Tourism Development, Elolibri-Bionet Danube – River of Cooperation, Young Researchers of Serbia</p>	<p>Ukrainian Adventure and Ecotourism Association</p>

## 2.5 Results of the Stakeholder Consultations

During the German funded project seven country experts have been identified, which implemented a consultation process in each country of the Carpathians in order to collect comments from the stakeholders to improve the strategy draft and discuss the geographical scope for the Carpathian Tourism Strategy.

The experts communicated with possible participants via email and also approached them via phone calls. The information about the stakeholder meetings were available on websites of organization of the national experts. Most experts distributed the Action Measures Worksheet prior the meeting via email so each participant could add comments in advance and then created a wider discussion at the meeting itself.

After the bi-lateral discussion, the experts organized a stakeholder meeting in each country as a part of this consultation process, which took place as follows:

- a) Czech Republic: 29.-30.8.2013, Hoštětín
- b) Hungary: 6.9.2013, Gömörzsoló
- c) Poland: 19.8.2013, Krakow
- d) Romania, 9.-11.9.2013, Bucharest
- e) Serbia: 26.8.2013, Zaječav
- f) Slovakia: 27.8.2013, Banská Bystrica
- g) Ukraine: 10.9.2013, Lviv

The experts compiled the comments into a country report. The main aim of the meetings was to create a SWOT analysis for the Carpathian area in each country, fill in the Action Measures Worksheet and to collect comments on the strategy itself. The measures in the worksheet were taken from the Protocol on Sustainable Tourism of the Carpathian Convention.

When collecting the filled in charts, the comments in the worksheet reflected the SWOT analysis in each country. All stakeholders expressed their opinion of the great potential for developing sustainable tourism in the Carpathians. However, they pointed out that there is a wide space for improvement to make it a success.

Among those mentioned, is the concern on implementing the development of sustainable tourism into national strategies, improving the laws on national and international level, promoting local products and businesses, building infrastructure, creating a shared database of all tourism products and strengthening awareness among local people.

The contributions of the stakeholders, who participated in the consultation process in the seven countries, have been taken into account when drafting this strategy.

## 2.6 Structure of the Strategy

- 5 VISION
- 6 DEVELOPMENT STRATEGY
  - 6.1 Sustainability as the foundation for development
    - 6.1.1 Environmental Sustainability
    - 6.1.2 Socio-cultural Sustainability
    - 6.1.3 Economic Feasibility
  - 6.2 OBJECTIVES
  - 6.3 DEVELOPMENT PRIORITIES
    - 6.3.1 Product development and marketing
    - 6.3.2 Coordination and Management
      - 6.3.2.1 Government
      - 6.3.2.2 Destination management
      - 6.3.2.3 Private companies (travel and tourism)
      - 6.3.2.4 Tourists and local citizens
  - 6.4 ACTIONS IN RESPONSE TO SWOT
  - 6.5 IMPACT ASSESSMENT AND MANAGEMENT
    - 6.5.1 Impact Assessment in the Carpathians
    - 6.5.2 Data gathering system to measure impacts
  - 6.6 MONITORING AND EVALUATIONS
    - 6.6.1 Measuring the performance of strategy implementation
    - 6.6.2 Feedback mechanisms

**Note: This structure introduction will be completed after the CC-WGST meeting in October 2013.**

## 3 OVERVIEW

### 3.1 Review of Background Information

The development of the appropriate infrastructure along with the preservation of the region's unique natural and cultural richness remains among the main challenges of the tourism sector in the future as well as marketing promotion of the region, inspite of notable development during the last 5-10 years.

For example, the tourist industry in the Ukraine and Romania has been hampered by a number of problems, including poor infrastructure, especially concerning roads, and the country's international image. Or, Hungary, based on the findings of image surveys run a couple of years ago by the Hungarian National Tourist Office, it was seen as a grey country where besides Budapest nothing is worthwhile visiting. Tax avoidance, corruption or black trading is widespread in many Carpathian countries, resulting in a modest tax base, which limits the scope for infrastructure enhancement.

The Carpathian countries suffered the negative effects of the socialist years. Tourism was mass and/or centrally directed tourism. Agriculture was following the-more-the-better approach, which still have its impacts in some of the regions (eg. over-exploited forests, small-scale agricultural practices, or lack of marketing touristic products and poor communication).

However several infrastructural developments were carried out during the latest 10 years. The success of the tourism product development in the region is not a success story all around, neither the positioning of the area as a unique entity. According to an overall content-analysis of a Google search, the keywords of "Carpathians travel" generates 921 000 hits, while those of "Alps travel" 42 100 000. (It is important to highlight that the Carpathians is one of the largest mountain range in Europe, 18.000 sq km larger than the Alps, with a large population of large carnivores, and many other species than in the Alps!). That is why a detailed analysis of the tourism products connected to mountain tourism, as well as the position of the Carpathians highlighted by the member-countries is needed.

#### 3.1.1 Related Plans, Documents and Initiatives

The development plans of the Charpatian countries are summarized in the table below. The latest focus points are highlighted regarding tourism development (the table contains information from the Annual Tourism Reports for European Commission (2013)).

Dimensions	Czech Republic	Hungary	Poland	Romania	Slovakia	Serbia	Ukraine
Existing strategies	Sustainable Development Strategy Government Resolution No 1242 (2004); State Tourism Policy Strategy in the Czech Republic (2007-2013)	National Development Plan of Hungary in the 2007-2013 New Szechenyi Development Plan	Directions for Tourism Development until 2015  Rural Development Programme for 2007-2013 (Quality of life in rural areas and diversification of rural economy)	National Tourism Development Master Plan for Romania 2007 – 2026.  National Strategy for Ecotourism, a Sustainable development strategy for the Carpathian in development phase	Tourism Development Strategy of the Slovak Republic until 2013 ( Ministry is currently working on a new tourism development strategy until 2020 )  Marketing Strategy of the Slovak Tourist Board for 2011 – 2013.	National Tourism Strategy of the Republic of Serbia, Danube Strategy	State Programme of Tourism Development (Law on tourism)
Role of Carpathians	n/d	n/d	n/d	Carpathians are highlighted among the most attractive regions	n/d	n/d	n/d
Main development focuses (2012)	establishing the network of geoparks, eco-certifications, certification for local food&products ; National Tourism Service Quality System), which will result in the creation of the Czech service quality system	improvement of Szechenyi Recreation Card (SzRC) (National recreation card), quality certification, accessibility of Hungary	new focus on rural tourism and on the promotion of agritourism	co-financing tourism infrastructure projects in public – public partnership (in ski-resorts, mountain areas, seaside areas), ecotouristic labeling	destination management, as a country-wide concept	n/d	n/d

## 3.2 Tourism Demand and Supply

### 3.2.1 Tourism Demand

According to the UNWTO, WTTC and OECD, tourism is one of the most important and influential economic sectors of the 21<sup>st</sup> century. It is anticipated that tourism, in terms of its economic importance is similar to the car manufacturing or oil industry. By quantitative measures, e.g. number of visits, total expenditure, employment, tourism really is a significant industry, however, by its complex impacts on the socio-cultural, natural and economic environment, it can be rather two-faceted.

Europe, i.e. the EU is the most visited region of the world, accommodating 54.8% of all international travellers. Good 10 years ago Central and Eastern Europe, in which the Carpathians are located, did not really play a crucial role, since the whole region attracted altogether 10.9% (87.9 million) of all international travellers (806 million). In the last 5 years, the performance of Central and Eastern Europe has been improved a lot, the tourist flow doubled: the number of international arrivals reached 111.6 millions in 2012. It must be highlighted, that the CEE has the lowest performance among the European regions, with a share of 20% from all European international arrivals (more details about demand figures are in Appendix 2).

It can be established that after the financial crisis of 2009, all the Carpathian countries gained back their attraction in the tourism market:

- Poland seems to be the strongest among the countries (by tourist arrivals, expenditure), followed by Hungary and the Czech Republic based on the data below. (It should be highlighted, that these data is concerned to total countries, including capitals, and other popular regions as well.)
- Average length of stay is extremely high in Ukraine (4.97 days in 2011), while 3 days seems to be the average (Poland is above the average). The length of stay is rather low in Romania, and Serbia.
- Because of the (assumed) biased information, it is rather difficult to evaluate the tourist flows of the countries. It can be highlighted (based on the data of “Overnight stays of non-resident tourists in all types of accommodation establishments, by nationality 2007-2011 (10.2012) UNWTO, without information about Ukraine), that the countries can be divided to 4 groups:
  1. **Leader:** Poland (10.6 millions guest nights)
  2. **Followers:** Hungary (9 millions), the Czech Republic (6.3 millions) The place of Ukraine is questioned, regarding the above mentioned facts, but based on the expenditure information, Ukraine should be rated into the second group
  3. **Countries with relatively low visitation** Slovakia (4 millions), Romania (3 millions), Serbia (1.6 millions)
- Domestic tourism shows a relatively high volume in Poland and the Czech Republic.
- It can be seen that the volume of international excursionists is very high in Poland, Hungary, which shows that there is a great potential to switch excursion trips to longer stay trips, with product development.

Revenues, especially per capita can really show the imbalanced status of tourism in many CEE countries. Especially, in the case of the Ukraine, data show that large number of visitors does not necessarily come together with lot of spending. This data ensure that most of the visitors to the Ukraine are not 'real' visitors, more like cross-border traders or people visiting friends and relatives. The low average figures are not good signs for sustainable tourism. Especially, that government officials, and politicians in all CEE countries are mainly concerned about visitation numbers, and do not take into consideration almost any other data or indicator of tourism.

The state's financial participation in the development of this industry had been very low in the Carpathian countries as it is, for instance, in the Czech Republic or in Hungary. More extensive financial assistance in the country has been provided for the State Program of Support for Tourism, activities of the Czech Tourism Authority (especially expansion of the network of offices abroad, promotion in foreign countries, marketing, creation of information systems, etc.), and activities aimed at promoting the development of tourism in regions. In Hungary, the state was running a special scheme from which accommodation establishments and locations, operators with natural healing/thermal water could develop and extend their services. This situation has certainly changed in those countries that joined the EU since tourism has instantly become one of the priority areas for development. Several billions of Euros have already been spent on tourism development directly (e.g. attraction developments) and indirectly (infrastructure developments).

Several CEE countries were built on their natural assets in tourism communication: Poland uses 'The Natural Choice' slogan; in the logo of Romania the Carpathians are resembled and in Hungary, 2007 was the 'Year of Green Tourism', and from Poland (through Austria) to Romania they refer to themselves as 'The country in the Centre/Heart of Europe'.

It would be highly important to analyze the Intra-Carpathian tourism flow, but due to the lack of the entity of Carpathians, there are no relevant data available.

### **3.2.2 Tourism Supply**

It can be seen that the Carpathians as tourism entity or unit does not really exist (the difference is really huge comparing it to the communication, the image of the Alps where skiing for example is a unifying product and image).

Mountain tourism is important in all the countries; still, the Carpathian Mountains are not highlighted on the websites of several national tourist offices (eg. Czech Republic, Hungary, Poland).

The Carpathians play a crucial role in the positioning of Romania, while there are very structured and sound information labelled with Carpathian Mountains in Slovakia. In Serbia, and the Ukraine, the Carpathians are among the must see destinations, though the low level interpretation of the online information cause difficulties.

Regarding the tourism product the followings can be summarized (detailed inventory can be found in Appendix 3):

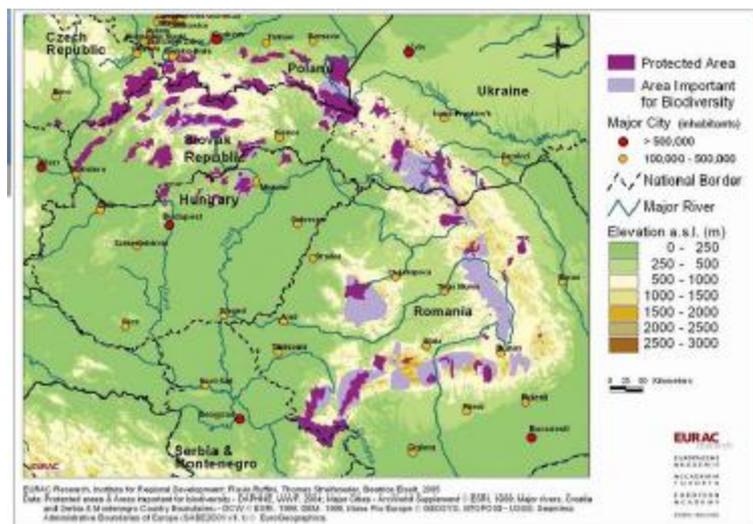
- Skiing in several slopes of the Carpathian Mountains is developed (infrastructure, and marketing communication) in Poland and Slovakia, but there are great efforts in Romania.
- Although the sustainable skiing is a crucial issue, it is not highlighted in any destination. There are “safety issues”, code of ethics, and educational programs initiated in the near past in Poland.
- Rural tourism is a basic product of the mountain regions. The authentic culture, and the agriculture of the village life as a main product can be seen in Romania, and The Ukrainian part of the the Carpathian Mountains, while in Slovakia a new, modern and diversified form can be identified. It must be highlighted that both rural tourism forms assure economic benefits in the mountain regions, that is why rural tourism development, connected to gastronomy, local food, sustainable agriculture is an important development issue in all countries, even in a joint “Carpathian Rural Lifestyle” initiative.
- Slow movement is popular in almost every country based on local gastronomy. There are initiations (2012) for a Carpathian gastronomy thematic road (Carpathian Culinary Heritage Network) to improve and label the gastronomy of 4 countries: Hungary, Romania, Slovakia, and Ukraine.
- There were specific, country-based models in the area of Quality of Life measurement in Poland, and in Romania, while in Hungary the unique model of Tourism Quality of Life (TQOL, Budapest Model) was improved (Puczko-Smith, 2009).
- The cultural heritage of the area is very rich, with several UNESCO heritage sites, and quite strong, useful information on the websites of NTOs, though thematic, Carpathian-wide trails are missing, though there are new initiatives like the Carpathian Tourist Road, including four countries.
- Geotourism is one of the most important alternatives in the mountain areas, with several, diversified activities. In some countries (eg. Poland, Slovakia), the infrastructure, the guided tours, as well as the marketing efforts are well developed, though in the rest of the region the quality of the infrastructure, and the available information is varied. That is why it is important to prioritize hiking, biking (or horse riding) paths, develop and maintain them, with assure useful information in every country. There are great initiations like the Green Bicycle - East Carpathian Greenway (more information in the Appendix).
- Adventure tourism is a suitable product to attract young, high spending travellers. The best activities, with high promotional values can be found in Poland and Slovakia.
- Ecotourism is particularly interesting in and around national parks, and protected areas, where visitor centres, educational paths are developed, though in the great part of the countries there is a lack of information, maps, prices, programs. (The exception is Slovakia, where there is abundant information about the facilities, though the term “ecotourism” is not defined.)

- Health tourism is an important issue in every country, though the special product of climate therapy (healing lung, and allergic illnesses) are rare, though these kind of special therapy can be the USP of the health tourism of the region.

### 3.2.3 Sustainable Tourism and Nature-based Tourism in CEE Countries

The Carpathian region provides some of the Europe’s cleanest streams and drinking water supplies and contains Europe’s greatest reserve of pristine forest. The area represents a unique composition of ecosystems with an exceptionally high biological diversity. Relatively small population densities, difficult access to many mountain ranges and a considerable number of large forests have allowed a rich and diverse flora and fauna to exist in the Carpathians. As a result of far reaching transformations of the natural environment in Central Europe, the Carpathians have remained either the only or the most important refuge for many plant and animal species, playing a significant role in the preservation of biological diversity in Europe.

**Protected areas of the Carpathians**



Omelyan (2005) pointed out correctly that in the Carpathians, cultural diversity is almost as great as biological diversity. People of different religions, languages, customs and traditions live together. The WW2 considerably destroyed this ethnographical variety, especially in the Eastern Carpathians, but there are still quite a lot of fine historical monuments – charming wooden and fortified churches and old houses picturesquely placed in mountain landscape.

Omelyan (2005) analysed the main trends and economic importance of sustainable tourism in the so-called Carpathian Countries. In that report it was concluded that tourism is and can be an important economic activity within the Carpathian countries. It comprises a wide variety of destinations and products as well as different involved stakeholders, both private and public, with much decentralised areas of competence often at regional and local levels. Tourism industry in the region accounts for about 5% of GDP, the figure varies from 2 to 9% depending on the country.

In the beginning of 1990s, both intra-regional and domestic tourism faced decline only a few of the most important areas, such as Beskydy in the Czech Republic and the Tatras in the

Slovak Republic and Poland, continued to attract tourists. Economically and geographically peripheral Carpathian sub-regions for years have not been able to compete with developed profitable tourist regions supported by the central national planning (e.g. Lake Balaton in Hungary). In our days, travel and tourism have become a logical focus for economic development in the Carpathian countries because of deep political and economic transition leading to new territorial structures, shifting of decision-making process from central government to regional authorities.

**Map of Carpathians by countries**



Regarding natural resources, and sustainability issues, the state of the countries nowadays is summarized in the following table.

There are existing differences between the countries or even discrepancies within the same country in the tourism sector, however. For instance, Northwestern part of the region is facing heavy pressure from tourist activities (e.g. the North and East of Slovak Republic or South of Poland, especially in winter times) on their natural resources (especially from skiing).

In the contrary, in the Southwest of the Carpathians tourism activities calculated in the number of tourists are very low (e.g. Serbia). Thus, the Northeastern part of Hungary, which lies within the Carpathian region, is the least developed part of the country with high rate of unemployment. The region can be characterized as one of huge contrasts with developed parts around cities yet many white spots in the rural areas that are located mainly in the buffer zones of borders (the detailed inventory of natural resources can be found in Appendix 4).

We can summarize that (based on the analysis of national parks, protected areas, health tourism based on natural resources, nature trails, biking paths, sustainable tourism assets):

- The highest number of protected areas can be found in Romania, Slovakia, Poland and Ukraine.

- It can be said, that Poland, Romania and Slovakia builds large part(s) of its tourism on the Carpathians. This can be realized on the number and the diversification of the hiking/biking/skiing infrastructure, as well as on the information provided about these facilities on the website of NTOs. In these countries we can find the highest interest of tour operators, specialized guides.
- In Romania there is a strong effort focusing on the development and the management of the Carpathians, being the greatest tourism region, though the development of the infrastructure, as well as the online information needs to be improved. The same is true for the Ukraine, though there we can find bottom-up initiatives (instead of mainly top-down ones in Romania), and great efforts on communication (but the level of the web-marketing knowledge could be improved).
- In Hungary and Serbia the national parks make great efforts developing educational trails, visitor centres, though the average quality of the hiking and biking paths varies a lot, as well as the information given about them are diffused.
- We can find strong commitment to the sustainability issues in all countries. The highest effort is shown by Romania and Czech Republic, where there is a strong effort to develop strict, and useful eco-certifications for suppliers as well as destinations.

The expected economic benefits of tourism are persuading many communities, particularly in the northern Carpathians and in Slovakia, to develop new tourist facilities with new and improved road networks. These are in addition to the major road programmes already envisaged as “Via Carpathia”, and declared as part of the Trans-European highway by the EU in 2012 (EC, 2012)

**It is important to mention the CarpathCC Climate Change Framework Project in progress, which focuses on tourism issues as well, though the report of the researches will be published and available in September /October, 2013.**

### **3.2.4 Travelling to mountain areas**

The Carpathians are one of Europe's largest mountain ranges, which cover about 210,000 km<sup>2</sup>. Spreading widely towards the North and South, they extend in an arc for ca. 1,450 kilometres from Eastern part of Czech Republic to the Iron Gate in Serbia.

The Carpathians cover mountain areas, therefore it is worth to note, that travel to mountain ecosystems is increasing at a rapid pace, as growing numbers of tourists are attracted to the clean air, unique landscapes and wildlife, scenic beauty, culture, history, and recreational opportunities that mountain destinations offer. Yet, while this growth provides important benefits to local communities and national economies, the very popularity of mountain areas also poses a potential threat to the health of their natural and cultural resources. Poorly planned and implemented tourism infrastructure, tours and tourist activities can have a serious impact on these often fragile ecosystems, as well as on the communities that inhabit mountain regions (as summarised by the UNEP-Conservation International Tourism and Mountains: A Practical Guide to Managing the Environmental and Social Impacts of Mountain Tours).

The Guide lists the most common elements of mountain-based tours include such as:

- **Nature walks.** An important means of experiencing the mountain flora, fauna and landscape, walks provide tourists with an opportunity to view, interact with and learn about native birds, mammals, reptiles, insects and other wildlife. Encounters with wildlife, which may be unplanned and occur unexpectedly during a tour or purposefully sought out and offered as a core part of a tour program, add significant value for visitors. The scenery and specific experiences of a walk may be quite different, depending on the season, and can be a particularly important source of summer income for areas that are generally dependent on snow-based activities.
- **Land-based adventure activities.** Such activities include cycling, mountain biking, quadbiking, horseback riding, canyoneering and, less often, rock climbing, ice climbing, hang gliding and caving. While the weather conditions (snow, ice-covered or dry) and access to sites may differ (e.g. frozen rivers or lakes or obscured or blocked trails), these activities can occur in mountain areas both on and off snow season.
- **Freshwater-based recreational activities.** Activities including river tours, canoeing, sailing, windsurfing, kite surfing, kayaking, rafting and freshwater fishing may also be a part of mountain tours.
- **Snow-dependent recreation activities.** Activities such as cross country, downhill and glacier skiing, heli-skiing, snow scootering, snowboarding, tobogganing, snowshoe walking and sledding are generally restricted to higher alpine mountain areas and concentrated in snowfall seasons.

There is no comparable information from all the countries; therefore it is not possible to introduce the role of the Carpathians in incoming and domestic tourism. Although, looking at the characteristics of domestic tourism in some of the CEE countries, it can be noted that Czechs usually spend their vacation at lakes (23.8%), in mountain resorts (15.3%). Almost 40% of Polish people spent more than 5 nights as a tourist in Poland, and 87.5% of the total guest nights were spent by Polish guests. Among the Slovak people, 38.1% typically visit the mountains, 27.7% lakes and rivers. These data indicate the relative role of natural areas when deciding where to travel.

Ecotourism is often considered as one of the main forms supporting sustainable development at destination level. Therefore, to highlight the main issues, where most of the Carpathian countries should pay attention to, the results of a survey collecting ecotourists preferences in the USA and some other countries are summarized below:

1. Excellent local guides – guides as in printed, online or personal services. Guides are essential for introducing local assets and heritage and to create involvement for visitors
2. Small groups – i.e. upto 10 or 15 persons in one group. Quality experience and optimal impact management is difficult over this group size
3. Education – education of local stakeholders as well as visitors is essential to make common goals accepted and achievable
4. High quality food – in this context high quality refers to locally grown, cultivated, processed foods that are from sustainable sources

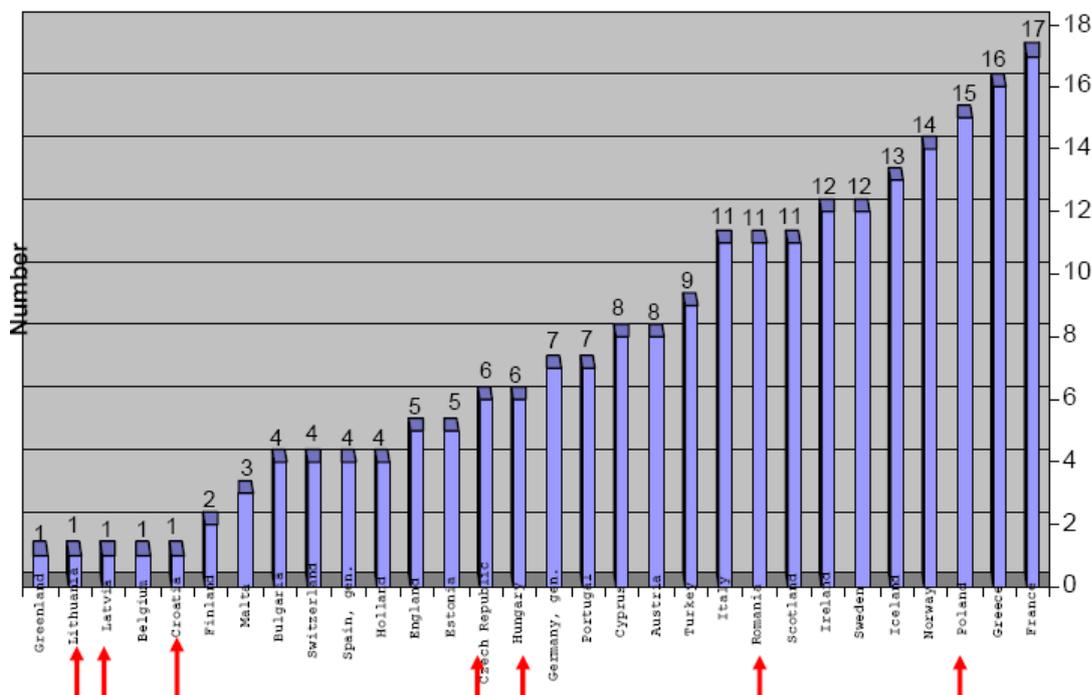
5. Non-crowded areas – the ‘consumption’ of natural and cultural assets and resources anticipates that crowding is avoided in all cases, which requires proper management and monitoring measures
6. High quality accommodation – quality refers to the level of attention and services (eg. personal, segment focused, etc. services) and not to luxury qualities of accommodation
7. Conservation – conservation is expected to be integral part of everyday planning and management practices

The people who may want to participate in ecotourism as a general observation tend to be:

- Over 35 years of age, but interestingly Spanish and Italian ecotourists tend to be younger
- Slightly more women than men
- Customers with above average personal income, again Spanish and Italian ecotourists tend travelling at lower budgets
- Mainly highly educated and representing higher social class(es)

It is also interesting to look at the results of a survey on the offer of German Ecotourism tour operators, in which Central Eastern Europe was labelled as an emerging ecotourism destination region (although there is no later edition of the survey it suggests several interesting points for consideration).

**Popular ecotourism destinations**



### 3.2.5 Summary - International trends

UNWTO's Tourism 2020 Vision forecasts that international arrivals will reach nearly 1.6 billion, 1.2 billion of which will be intra-regional. It is anticipated that, in mature regions, such as in Europe, growth of arrivals will slow down, but the growth in Central and Eastern Europe will be above world's average.

The study by GfK (2007) and The European Travel Commission Report 'Megatrends of Tourism in Europe to the Year 2005 and Beyond' (2005) summarized all the major trends both in general and tourism that will be influential in Europe, and seems to be relevant nowadays as well. It is accepted that CEE countries will face the same challenges and trends that Western European countries will, in spite of all the differences between the two regions of Europe. These differences however, make adaptation to changes more difficult in CEE countries. The main challenges that are especially significant for the Carpathians are the following:

- Increasing division between time-rich and money-rich markets
- Ageing population and increasing concern for health
- Youth market seeks more active (adventure) holidays
- Changes in tourist flows, i.e. popularity of so far off or low-seasons grow
- Increasing need for 'natural' (and local) products
- Rise of new destinations
- Destination image is linked more and more to health and safety
- More and more experienced travellers demand higher quality experiences
- Tourists may want to get rid of their "tourist" label
- Travel is no longer luxury, it is accepted part of life
- Growing influence and role of the internet
- Initiatives for 'budget' travel products and 'trusted' brands
- Development of budget travel may help new destination to emerge
- Growth in the self-catering holiday rental markets (second homes)

The above mentioned studies (see Appendix) as well as a report of 'Tourism of Tomorrow' (ETOUR 2005) highlighted that tourism development may become difficult and complex, as well as show that there are niches and markets for which and whom a 'new' destination, such as the Carpathians can become very attractive (e.g. growing environmental consciousness, travelling for shorter distances).

The new trends of 2013 are summarized by the IPK International (2012) as follows:

- Shorter trips but higher spending
- Travellers are older and book online more than ever
- South America and Asia drive global travel growth

- Long-haul travel outpaces holidays within Europe
- Russia booms but Italians and Spaniards stay at home
- Modest growth for European destinations in 2013 (Solid 2% growth forecast for 2013)
- More overseas visitors come to Europe
- Travellers want more individual holiday experiences
- Better information and open communications needed
- Adventure travel heads for new horizons (soft and green adventure)
- Adventure travellers are getting more diverse, High spending supports local communities
- Sun, sea and ... surgery: A fast-growing \$40-60bn niche market
- Hungary, Germany and the Czech Republic are seen as the leading destinations for medical tourism in Europe
- Strong growth outlook
- Making tourism more accessible: A growing segment of the population, Important source of tourism spending
- Social media and bloggers become major influences on travel behaviour
- Travellers use social media all the time.

### **3.3 Impacts of Tourism**

On one hand, tourism promises tremendous economic positive benefits: it is one of the world's most significant sources of economic outcomes and employment. However, tourism is a very complex industry involving numerous stakeholders (sometimes with opposite interests) and requiring significant amount of resources. As such, tourism can have very opposite effects according to the way activities are managed. Managed well, tourism can play a positive role in the socio, cultural, economical, environmental and political development of the destination and as such represents a significant development opportunity for many countries and communities. On the contrary, unchecked tourism development can lead to very damageable impacts (more on impacts of tourism can be found in numerous publications such as the one from the CBD Guidelines on Tourism and Biodiversity, UNEP or Puczkó-Rátz, 2001).

#### **3.3.1 Environmental Impacts**

The quality of the environment, both natural and man-made, is essential to tourism. However, tourism's relationship with the environment is complex. It involves many activities that can have adverse environmental effects. Many of these impacts are linked with the construction of general infrastructure such as roads and airports, and of tourism facilities, including resorts, hotels, restaurants, shops, golf courses and marinas. The negative impacts

of tourism development can gradually destroy the environmental resources on which it depends. Also various emissions can pollute or degrade the environment. Emissions are very complex since heating, air-conditioning, transport or even cooking can all have such impacts on the surrounding environment.

On the other hand, tourism has the potential to create beneficial effects on the environment by contributing to environmental protection and conservation. It is a way to raise awareness of environmental values and it can serve as a tool to finance protection of natural areas and increase their economic importance.

### **3.3.2 Socio-Cultural Impacts**

The socio-cultural impacts of tourism described here are the effects on host communities of direct and indirect relations with tourists, and of interaction with the tourism industry. For a variety of reasons, host communities often are the weaker party in interactions with their guests and service providers, leveraging any influence they might have. These influences are not always apparent, as they are difficult to measure, depend on value judgments and are often indirect or hard to identify.

The impacts arise when tourism brings about changes in value systems and behaviour and thereby threatens indigenous identity. Furthermore, changes often occur in community structure, family relationships, collective traditional life styles, ceremonies and morality. Particularly relevant to this region, the so called demonstration effect can cause long term changes in local communities.

But tourism can also generate positive impacts as it can serve as a supportive force for peace, foster pride in cultural traditions and help avoid urban relocation by creating local jobs. As often happens when different cultures meet, socio-cultural impacts are ambiguous: the same objectively described impacts are seen as beneficial by some groups, and are perceived as negative - or as having negative aspects - by other stakeholders.

### **3.3.3 Economic Impacts**

The tourism industry generates substantial economic benefits to both host countries and tourists' home countries. Especially in developing countries, one of the primary motivations for a region to promote itself as a tourism destination is the expected economic improvement.

As with other impacts, this massive economic development brings along both positive and negative consequences. There are many hidden costs to tourism, which can have unfavorable economic effects on the host community. Often rich countries are better able to profit from tourism than poor ones. Whereas the least developed regions have the most urgent need for income, employment and general rise of the standard of living by means of tourism, they are least able to realize these benefits. Among the reasons for this are large-scale transfer of tourism revenues out of the host country and exclusion of local businesses

and products. Still, dependency situations, i.e. when a local area or community depends on one activity, e.g. tourism, this can lead to rather disadvantageous consequences.

Diversification in an economy is a sign of health, however if a country or region becomes dependent for its economic survival upon one industry, it can put major stress upon this industry as well as the people involved to perform well. Many countries, especially developing countries with little ability to explore other resources, have embraced tourism as a way to boost the economy.

The seasonal character of the tourism industry creates economic problems for destinations that are heavily dependent on it. Problems that seasonal workers face include job (and therefore income) insecurity, usually with no guarantee of employment from one season to the next, difficulties in getting training, employment-related medical benefits, and recognition of their experience, and unsatisfactory housing and working conditions.

#### **3.3.4 Positive impacts of sustainable tourism**

Supporting the objectives of the strategy sustainable development can have various positive impacts on the host community which summarised as follows:

- Socio-cultural impacts
  - Population is maintained
  - Jobs created (temporary and permanent)
  - Customs, professions kept (but there is a high risk that it becomes staged), buildings re-used and revitalised
  - Healthier and more balanced community characteristics and structure (e.g. better image, growth of tolerance)
  - Impacts on the individual and families (e.g. better leisure opportunities, improved social mobility, knowledge of languages, more income)
- Environmental impacts
  - Infrastructure developments, especially roads and utilities
  - Funds for conservation are created and increased
  - Environmental education and awareness
  - Change of landscape and re-use of lands (buildings)
  - Conservation of local architectural styles since tourists tend to prefer 'different' experiences
- Economic impacts
  - More business opportunities, especially but not only in tourism
  - More balanced and wider service supply
  - Better intra-regional transport system and services

- Multiplier-effects, i.e. positive economic impacts can be traced at regional and national and not only at local level
- Arrival of new technologies
- Increased local tax revenues and spending by visitors at local businesses
- Job creation

Still, the above mentioned impacts are considered positive, almost all of them can have a negative side as well, i.e. impact assessment is essential before any development takes place.

## 4 SWOT

The below listed SWOT is a result of the consultations with the stakeholders in the seven countries of the Carpathians as explained in chapter 2.5.

### 4.1 Strengths and Opportunities

The Carpathian mountain system is unique at both the European and the global scale. It forms one of the very last regions in the centre of Europe particularly rich in great beauty of natural resources, which is due to its wide diversity of landscapes and vegetation types as well as the traditional cultural landscape and forms of land use as well as a rich and diverse folklore.

The strengths and opportunities for the Carpathians are the following:

- Strong natural and cultural assets, which are not yet well-known and seen 'exotic'. The 'new destination' status makes prospective visitors curious and interested.
- In most areas local and regional (tourism) organization networks being developed and in operation.
- Lack of image is an opportunity, since a brand new image can be created and communicated. This requires, though, close cooperation and coordination.
- Various EU funds were/are available in EU member countries and for non-EU countries, too, in the form of (not only) cross-border co-operations. These funds, according to the priorities of the national development plans, supported tourism, infrastructure and social developments, although in various cases and countries the use of these funds was questionable.
- The efforts and initiatives of NGOs can be extended to more countries and areas.
- Since trips in general are getting shorter, it can be expected that people visit other places than the far distance coastal area, such as new destinations in mountains or inland lakes. In this budget air travel definitely can and does play significant role.
- All of the Carpathian countries, to different degrees, are considered as developing economies, which directly effects domestic and international tourism (e.g. in terms of frequency of trips and spending power).
- In Europe the demand for responsible tourism grows, which is a key market generating factor for the Carpathians.
- Besides, travel and tourism companies also show more interest in sustainable practices, especially, if these can be translated to higher financial returns or decreased costs.
- Product development has great opportunities, since existing resources, e.g. narrow-gauge trains, forest trails used for logging can relatively easily be turned to tourism services.

## 4.2 Weaknesses and Threats

Analysing the recent situation the following challenges can be identified:

- Existing tourism product supply (skiing, snowboarding, mountain climbing, trekking, bird-watching, hunting, fishing, rafting, parachuting, spas, city visits, festivals, events, gastronomy, (folk) traditions) is a great baseline for sustainable tourism, though the impacts should be monitored, the quality should be controlled, and iteral development is needed. Without integrated planning developers will want more locations to be involved and to have more visitors, which leads to more intensive use of resources. In comparison the strong image and a more balanced product-mix of the Alps mean strong advantage for that region.
- The once favourable price/quality ratio made the region attractive, but price-led image and competition is always very dangerous and not sustainable and as of now this is often more like a myth than reality. Cheap prices may seem to be tempting for Western visitors, but it leads to price competition, where sustainability is not a priority at all.
- Being a Single Destination would mean
  - Visitors (prospective and existing) consider it as one area
  - Existence in virtual space only, i.e. perception of people
  - Involved parties do work together

The Carpathians are far from that status. The Carpathians, yet, can be seen as a geographical region and not a destination.

- There are seven countries involved, which also means seven languages, legislation, organizational structures, etc.
- Non-governmental sector is underdeveloped. There are some NGOs (like Greenways or CEEweb) but with limited funds and resources and resources, therefore with limited outcomes. Efforts and results can be sporadic.
- Lack of maintenance of already existing services and facilities.
- Weakly developed social capital mistrust and unwillingness to co-operate. The co-ordination between countries is sub-optimal, due to political, historical and economic reasons. Since two (Serbia and the Ukraine) of the seven countries are not yet members of the EU, cross-border entry and various other administrative issues make co-ordination difficult.
- It is anticipated that the link and communication between 'nature' and 'culture', i.e. bodies responsible for management can certainly be improved.
- Ad-hoc planning and management is typical to many areas. Although, every EU member country had to prepare its National and Regional Development Plans, where sustainable tourism is a main issue, though the action plans are not known, which can make the "idea" work.
- Monitoring and assessment of developments are prone to be avoided.

- Destination awareness is very low, destination management practices are just in the beginning phase.
- There is pressure from developers/municipalities for quick (visible) results, which may lead to unsustainable, but maintainable developments.
- Everyday social problems dominate politics and budget negotiations, i.e. fighting poverty and unemployment. Sustainability may not be a priority. Organizations and institutions still have problems defining their roles and responsibilities if tourism was in question. Quick (financial) returns and benefits are always favoured, while long term impacts are not considered.
- Externalities of economic activities (e.g. mining) do influence natural and cultural environments. Also, leisure activities, such as quads, 4WDs, bikes in mountain areas, without management and monitoring do have rather detrimental impacts.
- Infrastructure system is underdeveloped, which makes tourism access very difficult. However, infrastructure development should take place to increase the quality of life for locals, and then, for tourists.
- Lack of necessary skills, knowledge and experience in sustainable practices among entrepreneurs, local communities and governmental sector.
- Quality of services is varied and is not reliable.
- Lack of trustworthy and comparable data on tourism and related fields, especially at local level.
- The role of politics and that of some pressure groups (e.g. land owners, agriculture or hunters) put a pressure on conservation and integrated development and management.

## 5 VISION

The ultimate vision for tourism in the Carpathians should aim for maximising the positive impact of tourism for biodiversity, environment, jobs and economy and has been phrased during several consultation meetings as the tripple**A**:

<b>A1</b>
<b>The Carpathians is a top competitive destination in Europe, based on its unique natural and common cultural heritage preserved and maintained on large integral areas.</b>
<b>A2</b>
The people in the Carpathians are successful and proud of maintaining their local authentic traditions, cultures, and landscapes, which contribute to unique tourist experiences.
<b>A3</b>
Good cooperation, local management and partnerships contribute to the high quality of tourism services, which ensures continuous benefits for local people and economies.

## 6 DEVELOPMENT STRATEGY

As this strategy is expected to drive the joint efforts governments, businesses and NGOs all should be aiming at, it is necessary to establish key terminologies.

### 6.1 Sustainability as the foundation for tourism development

#### 6.1.1 Environmental Sustainability

As UNEP stated „Meeting the needs of the present without compromising the ability of future generations to meet their needs”, e.g. keeping population densities below the carrying capacity of a region, facilitating the renewal of renewable resources, conserving and establishing priorities for the use of non-renewable resources, and keeping environmental impact below the level required to allow affected systems to recover and continue to evolve. (UNEP, 2005)

#### 6.1.2 Socio-cultural Sustainability

The natural environment is not a standalone entity. Cultural, social, heritage related aspects can and should also be taken into consideration. “Social sustainability relates to the maintenance of political and community values. Social values and norms, being largely intangible, relate to the “ethics, value systems, language, education, work attitudes, class systems” and so on, that influence societal relations. Social sustainability also speaks to the satisfaction of basic human needs within the society such as food, clothing, and shelter. The sustainability of social needs and values alludes to the quality of growth that occurs in the economy.” (Nurse, K, 2006)

#### 6.1.3 Economic Feasibility

Tourism is a business activity that needs frameworks, structures and targets. „Agenda 21 clearly identified information, integration, and participation as key building blocks to help countries achieve development that recognises these interdependent pillars. It emphasises that in sustainable development everyone is a user and provider of information. It stresses the need to change from old sector-centered ways of doing business to new approaches that involve cross-sectoral co-ordination and the integration of environmental and social concerns into all development processes. Furthermore, Agenda 21 emphasises that broad public participation in decision making is a fundamental prerequisite for achieving sustainable development.” (Will, A. (2007).

In sustainable planning processes one of the key bottlenecks often is the economic feasibility of activities that maybe socially and environmentally sustainable. That is why we have to consider how various alternatives can work in real life situations.

## 6.2 Objectives

The three key objectives of the strategy are:

1. *Establishing of supportive conditions for sustainable tourism products and services, including development of a marketing scheme for the promotion of the Carpathians as a unique destination.*
2. *Developing an innovative tourism management at all levels, fully integrating the needs of local populations and the preservation of natural and cultural heritage.*
3. *Establishing a continuous process of awareness raising, capacity building, education and training on sustainable tourism development and management throughout vertical and horizontal levels.*

## 6.3 Development Priorities

According to WTTC's Position Paper (Welcoming the New EU Member States with Jobs & Growth: A practical manifesto from the travel & tourism private sector) within most of the new member states, the sector accounted for a much smaller proportion of the economy than the EU average. This left and has been leaving immediate headroom for growth.

To a good part of the Carpathians the sustainable tourism objectives (Earth Summit 2002) are also rather relevant, as it is a renewed initiative globally after the crisis in tourism (Bieger-Kepler, 2011). The Sustainable Tourism Objectives' (STO) approach is gaining recognition by national governments and local authorities. Although STO is still relatively new and has not been widely applied in practice, existing case studies reveal a number of lessons. These include:

- Diverse activities - beyond community tourism it includes product development, marketing, planning, policy, and investment.
- A lead advocate for STO is useful, but involving other stakeholders is critical. STO can be incorporated into the tourism development strategies of government or business.
- Location: STO works best where the wider destination is developing well.
- STO strategies often involve development of new products, particularly products linked to local culture. These products should be integrated with mainstream markets where possible.

- Ensuring commercial viability is a priority. This requires understanding demand, product quality, marketing, investment in business skills, and involving the private sector.
- Economic measures should expand both formal and casual earning opportunities.
- Non-financial benefits (e.g. increased community participation, access to assets) can reduce market vulnerability.
- STO is a long-term investment. Expectations must be prudent and opportunities for short-term benefits investigated.
- External funding may be necessary to cover substantial transaction costs of establishing partnerships, developing skills, and revising policies.

In the following we discuss the elements of these strategic objectives. The three objectives show certain amount of overlap; therefore the related measures are discussed in following major groups:

- Product development and marketing
- Coordination and management

### 6.3.1 Product development and marketing

For comparison purposes it is worth to refer to the Alps, which has already achieved, in terms of market awareness, what the Carpathians eventually can. The Alps can be compared to the Carpathians, since the attraction-mixes seem to be very similar, i.e. both mountain regions provide:

- Winter products: skiing, snowboarding
- Summer products: walking, mountaineering, bird watching, extreme sports, lakes and rivers
- Cultural and heritage products: city visits, gastronomy, events and festivals
- Health products: bath, wellness and medical services

#### The Alps



Although, in terms of natural and cultural assets the two mountain regions are similar, the development trends in the Alps show that what important in the Alps, is rather different from that of the Carpathians, i.e. product development should be focusing on closing the gap (this does not mean to copy what the Alps do but to learn from best practices):

- Development of complementing products and services
- Development of car free destination(s) with soft mobility
- Environmentally sound transportation completed with electronic booking and information systems
- Improvement of visitor information provision and safety
- Interpretation of assets, stories and heritage

These issues are or would also be relevant for the Carpathians, but the significant differences in terms of human and physical resources, as well as tourism infrastructure mean that the Carpathians cannot and may not aim for the same targets (e.g. in visitor numbers) what the Alps have achieved in the last years. The feeling of strong competition between the Alps and the Carpathians can also be seen in the final document of the so called Carpathian project (INTERREG IIIB/CADSES).

ICT solutions and applications can help to improve the marketing effectiveness and the communication among the co-operative participants, as well as the experience, and visitor management issues.

1. Communication among the participants: Different forums, blogs, social media solutions (eg. LinkedIn groups) can help in finding the co-operative partners, as well as in keeping in touch with them. These solutions help in communicating with the local community and industrial partners as well.
2. ICT application and visitor-management: It is highly important to manage the visitor-flow in time and space. If there are definite borders of the protected area, with gate-systems, pre-booking systems can help to diffuse the visitors in time. Mobile or location-based applications seem to be crucial points nowadays. With the help of these solutions visitors can be easily driven on the given paths, while maps, additional information, photos, videos can support the nature-experience (eg. GPS Tour of Banff National Park: <http://www.youtube.com/watch?v=a5zGK7cCVIM>).

The following table summarises the key products, the key challenges, and development needs.

It seems inevitable to have more and more **golf projects** in the region. Golf, especially accompanied by (luxury) housing developments, is a rather profitable form of investment. Golf courses, because of the various qualities of the development process and the upkeep, are not considered acceptable, if sustainability was taken into consideration. The 'Golf Environment Europe' non-profit organisation is, however, working to promote environmental sustainability in golf. Golf Environment Organization recognises:

- the global environmental challenges facing society
- that the golf sector, like all sectors, has a role to play in addressing those challenges

- that poorly designed and managed golf facilities can negatively impact on the environment
- that golf can be a positive agent for environmental enhancement, public awareness raising and environmental education.

The initiative provides support and practical recommendations for developers and for destination alike.

Winter tourism, especially skiing/snowboarding, has already become popular in many areas of the Carpathians. More and more investments are being made to upgrade and to extend skiing facilities. Although, skiing may seem to be a 'green' sport, because of the necessary clearings of slopes and water usage (especially for artificial snow), it has several negative impacts on natural environment (and sometimes on the host community, too). Another initiative, i.e. the so-called **Sustainable Slopes** (The environmental charter for ski areas, National Ski Areas Association, USA or the German Federal Ministry for the Environment on 'Sustainable Ski Resorts') makes efforts to set new standards and processes. They use various tools, such as 'The Environmental Indicators Form' asking for the sum of energy, water, solid waste, and transportation reductions from individual projects (although, the total utility usage of energy, water and waste generation data is no longer requested).

It has to be noted, that there is no such initiative as the '**Sustainable Baths**' or spas. In the region, most of healing resorts build on natural assets (caves, thermal waters) that are vulnerable, and not available without limits. Furthermore, especially considering excess thermal water, the implications can be rather dangerous, e.g. increased temperature of surface waters, which leads to change of habitat, etc.

**Local wellbeing and wellness initiatives** that build on local natural and/or cultural resources and assets (following the likes of the Nordic Wellbeing initiative or wellbeing (rural) tourism developments in Finland) should also be explored especially that those may deeply build on cultural and heritage assets as well.

**Accommodation suppliers** (individual and chain ones alike) have started to tackle environmental issues some years ago. Most of the practices, however, were motivated by the decreased operation costs, e.g. intelligent heating, ventilation and lighting systems, solar cells, cutting back on washing the towels and bedlinens. Also, there are hotels with special theme, Green Hotels or Environmentally Friendly Hotels (USA), Bio-Hotels (Austria) that are all somehow related to sustainability. It is also known, that accommodations that are individually owned and managed (and most of time smaller than chain hotels) can probably more easily sustainable techniques and tools (such as local raw materials for the construction as well as for catering).

Also the **internet** made it possible to have accommodations that are very much linked to local community. Direct online selling is getting more and more important for the hotel sector. The hotels invest in direct sales based on huge efforts in online marketing with relevant result: the direct online sales increased by 11% during 5 years in the USA, and reached an average rate of 30% of the total sales (HeBS Digital, 2012).

The most popular tools in the Web Marketing Mix seem to be the social media (acc. to the 43% of the respondents of the recent research of HeBS Digital, 2012), while mobile

marketing is the second. Regarding the budget spent on the different tools, it must be highlighted that the so called pulled (demand-driven) marketing is crucial: Search Engine Optimization (SEO) and Search Engine Marketing (pay per click advertisement in search engines) gave all together ca. 46% of the budget of the respondents, the second is website design (20% of the budget), E-mail campaigns seemed to be important (11%), while display as well as social media campaign got a relevancy of around 7-7%.

All these tools assure cost-effective marketing possibilities for local small and medium size service suppliers, as well as for the destinations. It must be highlighted, that proper knowledge is vital, that is the there is a high importance of trainings.

<b>Products</b>	<b>Products/services investors find interesting</b>	<b>What sustainable practices need?</b>	<b>Countries</b>
Skiing	Building green lodges, developing ski resorts	Sustainable Slopes	Poland, Slovakia, Romania, the Ukraine
Rural tourism	Repositioning the existing accommodation, green practices	Using local materials, products, building authentic, green facilities, identifying the unique experience promises of “Carpathians Rural Lifestyle”	Carpathian wide
Slow movement	Developing new agritourism networks	Sustainable agriculture, broaden the Carpathian Culinary Heritage Network	Carpathian wide
Heritage tourism	Hotel developments in (historic and business) cities	Complex and balances supply of accommodation establishments at destinations; development of thematic roads	Carpathian wide
Geotourism	Specialized tour operator services	Sustainable management, maintenance of the paths, code of behaviour for tourists	Carpathian wide
Adventure tourism	Specialized tour operator services	Sustainable management, maintenance of the paths, parks, code of behaviour for tourists	Poland, Slovakia, the Ukraine, Romania
Ecotourism	Building eco, green lodges	Visitor management issues in national parks, green certification, code of behaviour for tourists	Carpathian wide
Baths, mountain healing	Repositioning existing spas and developing new ones, using climate therapy as USP of Carpathians	Assuring access for locals, offering local products, therapies, treatments	Romania, Hungary, the Ukraine, Serbia
Dark Sky Parks	Developing special themed parks eg. Dark Sky Parks (see appendix)	Visitor management, code of behaviour for tourists	Poland, Slovakia, the Ukraine, Romania, Serbia
Golf tourism	Golf projects	Applying the ‘Sustainable Golf Courses’ approach	Carpathian wide
Accommodation	Developing eco-lodges	Eco-certification, identifying “Carpathian accommodation style” (architecture, food, additional services)	Carpathian wide
Transportation	Transportation infrastructure (airports, train especially)	Complex transportation infrastructure developments, zoning, identifying non-motorized areas, villages, developing local public transport (eg. bus transfers)	Carpathian wide

Existing products	Products/services investors find interesting	What sustainable practices need?	Countries
Marketing issues		Sustainable development strategies considering the needs of communities (including tourism)	all
		Co-operations in management and communication	all
		Training of decision makers and industry	all
		Joint approach in finding and supporting investors in tourism	all
		Adopting the meta-management concept of destination management, and focusing on local initiations, monitoring	all
		Identifying the Carpathian experience, finding out the USP of the Carpathians (versus the Alps, e.g. traditional rural lifestyle, climate therapy) and starting joint campaigns (on the website of each NTOs as well)	all

## **6.3.2 Coordination and Management**

### **6.3.2.1 Government**

The primary task of governments in each country is to incorporate the basic principles of sustainable development into the general planning process. Throughout this process, there is a need for active co-operation with the international governmental and non-governmental organisations (as the major aim is to achieve global sustainability), with the civil sphere of the given country, with the representatives of tourism, and with the host community. The representatives of the community, the civil groups, and the tourism sector should all be involved in each stage of the tourism development process.

If a government is committed to sustainable tourism development, it has to assess the adequacy of the existing economic, regulatory and voluntary frameworks for achieving the principles of sustainability. If mechanisms are inadequate, new frameworks should be developed including, among others, methods and standards for the regulation of impact assessment, controlling mechanisms for the tourism developing projects, legal enforcement and monitoring of environmental audits, adaptation of land-use and construction regulations, and protection of historical and cultural values.

Governments should also support the assessment of the socio-cultural, economic, and physical impacts of tourism, since the negative impacts can be prevented or decreased, and the positive impacts can be encouraged. The impacts can be prevented or encouraged if the decision-makers are actually aware of those potential impacts, and if the tourism enterprises, the local communities, and the tourists are all able to assess the implications of their own activities. Therefore, governments should introduce such educational and informational programmes that let all stakeholders know about the nature and functioning of the tourism system as well as its impacts, the skills and methods required to influence the impacts, and the basic principles of sustainability.

An important element of international co-operation is to facilitate information exchange and technology transfer between developed and developing countries. This is important in enabling the nations to learn from each other, so that they can benefit from each other's experiences. International co-operation might also ensure that new tourism destinations that are developed, respect the principles (and practices) of sustainable development from the very beginning.

Organizations, e.g. UNWTO, WTTC or GIZ have published guides for planning that can be adapted by municipalities, i.e. the 'Sustainable Tourism as a Development Option', Practical Guide for Local Planners, Developers and Decision Makers by UNWTO:

- Step 1: Situation analysis
  - Stakeholders and interests
  - Problems and potentials
  - Framework conditions and prerequisites
- Step 2: Designing a strategy for tourism development

- What kind of tourism? Which tourists?
- Where to begin?
- Step 3: Determining roles and responsibilities
  - Networking the stakeholders: who, how, with whom?
- Step 4: Community involvement
  - Participation stages in tourism development
  - Prerequisites for community involvement
- Step 5: Guarantee sustainability: indicators for monitoring and evaluation

### **6.3.2.2 Destination management organisation**

The implementation of the sustainable development principles happens at local level, that is why the so called “destination management” concept is an important issue.

Historically, the coordination of the destination was limited to marketing-communication, as the globally known destination spent a lot on communication, mainly by state subsidies. The “meta-management” or the overall management of the destinations appeared only in the last decades (Sainaghi, R., 2006). The overall coordination came alive because of two factors: 1. assuring the sustainable development of the destinations to eliminate the negative effects of tourism; 2. to develop and harmonize the supply elements of the destinations so as to meet the needs of the new tourists. The two main pillars of the overall coordination – sustainable development and assuring market success – are included in the concept of destination management. The most overall definition of the meta-management is as follows: “ (...) destination management is the strategic, organizational and operative decisions taken to manage the process of definition, promotion and commercialisation of the tourism product [originating from within the destination], to generate manageable flows of incoming tourists that are balanced, sustainable and sufficient to meet the economic needs of the local actors involved in the destination.” (Franch, M. - Martini, U., 2002)

The tasks of the destination management can be summarized according to Bieger (1997) as follows:

- Visioning and developing function (mutual vision creation, market research, positioning and benchmark analysis, searching for financial sources, attracting investments, marketing-strategy, development strategy, and supporting realization, monitoring)
- Supply function (developing supporting resources, harmonizing and packaging supply elements, innovation, information-services, visitor management, quality management)
- Communication function (communication activity at strategic level: image and brand building, tactical communication, supporting sales of the service suppliers, mediator role, building central reservation system and DMR (integrated destination management ICT system), sales promotion, monitoring)

- Incubation function (representation of interests) (lobby-activity, supporting cooperation and networking, cross-border cooperation, involving locals, development of human resources, consulting, knowledge sharing)

Beside the important planning and management issues, branding is a crucial issue, mainly in regional level, so as to assure the “Carpathian” brand.

### **6.3.2.3 Private companies (travel and tourism)**

Since national, regional and often local governments are rather occupied with social and day-to-day economic problems, private companies can even pave the way to a more sustainable practice, and eventually can influence legislation that provides the necessary legal foundations. As the **'Blueprint for New Tourism'** (WTTC) collected, many of New Tourism's (responsible, sustainable) key tasks for the private sector are very concrete:

- Expanding markets while promoting and protecting natural resources and local heritage and lifestyles.
- Developing careers-education-employee relations, promoting smaller firms, raising environmental awareness, and helping in its own way to narrow the gap between the 'haves' and 'have-nots'.
- Sensitive provision of traditional tourism products and imaginative product diversification that reduce seasonality and increase yields.
- Improving the quality of tourism products and services, and adding value for money while increasing consumer choice.
- Agreeing and implementing quality standards at all levels and in all areas, including staff training.
- Transfer of industry skills and best practice that spreads the benefits widely and efficiently.
- Increasingly sophisticated and more precise measurement of the sector's own activity, to feed into strategic business decisions.
- Communicating more effectively with the world in which it operates – including energetic input from Travel & Tourism umbrella organizations to government, at strategic and local levels.
- The cumulative effect will be a shift towards Travel & Tourism that continues to serve the private sector's own needs, while embracing the wider interests of the countries and communities in which it operates.

**Tour operators** (TOs) do have significant role in how a destination may develop, TOs set requirements and destinations, if they want to have visitors, should and do comply. This in long run can create a dependent situation, which is not favourable for the destination itself. Many TOs, however, recognized their influence and set up the so-called 'Tour Operator Initiative'. The Tour Operators Initiative (TOI) defines key areas where companies can integrate sustainability practices such as:

- Internal management, by taking into account sustainability principles in the management of human resources, office supplies and production of printed materials;
- Product development and management, by planning tours and selecting holiday package components that minimise environmental, economic and social impacts;
- Contracting with suppliers, by integrating sustainability principles into the selection criteria and service agreements of suppliers;
- Customer relations, by guaranteeing privacy, health and safety standards, and providing customers with information on responsible behaviour and sustainability issues at their destinations; and
- Relations with destinations, by supporting destination stakeholders' efforts to address sustainability issues and financially contributing to conservation and development projects.

The TOs recognised their responsibility to develop and operate in a manner that makes a positive contribution to the natural, social and cultural environment. We also recognise and accept our responsibility to operate in ways that reduce environmental impacts, benefit host communities, safeguard the future livelihood of local people, and ensure the protection of destinations for future generations. In doing so, we commit in this Initiative to:

- protect the natural environment and cultural heritage
- cooperate with local communities and people, ensure they benefit from the visits of our customers and encourage our customers to respect the local way of life
- conserve plants and animals, protected areas and landscapes
- respect the integrity of local cultures and their social institutions
- comply with local, national and international laws and regulations
- oppose and actively discourage illegal, abusive or exploitative forms of tourism
- work closely with business partners, local authorities, regional and national governments and other organisations to achieve sustainable development of tourism
- provide information on our activities to develop and encourage the sustainable development and management of tourism
- communicate our progress in implementing this commitment.

**Transport companies** and fuel supplier can also play a significant role, since at it seems for a good number of years, cars, coaches and aircrafts will be the main means of travel within and into the Carpathians. Rather high percentage of cars and coaches running on the roads of the Carpathians do not have catalisators, and their operation is not fuel-efficient, therefore the fumes and gases mean more serious impacts than similar means of traffic in the Alps, for example. Airlines, even some budget ones (e.g. WizzAir, easyJet and recently Ryanair) have discovered the region, since they can expect not only incoming, but outgoing traffic (when incoming means tourists and business, outgoing mean commuting employees to Western cities). All airlines try to cut their operation costs, which often mean decreased

environmental impacts (such as no on-board food means less waste). EasyJet takes it even further, when they announced in June, 2007, their vision of a more environmentally friendly aircraft, which is due to come to service in 2015. The so called 'easyJet ecoJet' would release 25% less noise, 50% less carbon dioxide and 75% less nitrogen-dioxide (aiming for less than 47g of carbon-dioxide per passenger kilometre, than would be less than half of the recent emission level).

#### **6.3.2.4 Tourists and local citizens**

Tourists and local citizens themselves play an extraordinary role in the realisation of sustainable tourism. Firstly, when making travel decisions, they can force the tourism sector to function in an ethical and environmentally responsible way by carefully selecting the tourist companies and services they wish to deal with. Secondly, during their stay at a destination, tourists can also make sure that their activities do not damage the physical and socio-cultural environment of the destination, and that they contribute to the improvement of the quality of life of the local residents as much as possible. Tourists could also support or directly participate in local environmental and cultural conservation efforts. Local citizens can also show good practices to visitors.

In the case of visitors and local citizens voluntary schemes, such as Code of Practices are the appropriate tools promoting sustainable practices. Various organizations, e.g. CRC Sustainable Tourism published special guides, such as:

- Green Guide for 4WD tours: best-practice environmental management for 4WD and off-road tours
- Green Guide to Blue Seas: best-practice environmental management for small boat tours
- Green Guide to White Water: best-practice environmental management for whitewater raft & kayak tours

As an example for international co-operation the Carpathian Tourist Board (CTB) should be mentioned. CTB was founded by the Transcarpathian Regional State Administrations together with private sector and local community in August 2001 under the support of TACIS Project "Support to local development and tourism in the Carpathian region of Ukraine". As end of 2005 about 130 tourist companies, educational institutions and cultural organisations are the active members of the Carpathian Tourist Board (<http://www.tourism-carpathian.com.ua/en/rada/about.php>).

The main objective of the Board was supposed to be supporting tourism development in the Carpathian region, to promote the Carpathian region as holiday destination and to market the tourism of Lviv, Ivano-Frankivsk, Transcarpathian, Ternopil and Chernivtsi regions as a whole. Among the main activities of the Carpathian Tourist Board at present there were the following:

- Co-ordination of regional efforts in tourism development
- Analysis of development and activities of the tourist organisations

- Organisation of the round-tables, seminars, conferences and meetings with the tourist companies of the region
- Marketing of regional tourist resources
- Monitoring of regional tourist industry
- Elaboration of the tourist information centres network in the region
- Elaboration of the green rural tourism system of marking and standartization
- Edition and distribution of the brochures, maps, tourist guides, booklets on the tourist products
- Presenting the tour potential of the Carpathian region at the specialised international exhibitions and fairs
- Creation of the regional tourist information database

During the period from its creation CTB has published first guides about the region in English, Ukrainian, Polish, Russian and German languages; tourist map of the region, posters and post-cards. The region so far has been represented at more than 30 international fairs and tourist exhibition. In the year of 2003 the first tourist-information centre was founded in Ivano-Frankivsk and shortly after that - network of 4 such centres in Yaremche district of the Ivano-Frankivsk oblast, as a model for the whole region.

In its communication CTB advertises the following attractions and products:

- Wooden churches
- Caves
- Lakes, watrfalls, rivers
- Castles and some selected heritage sites
- Skiing and winter tourism
- Walking and cycling
- Horse riding
- Carpathian tram
- Rural tourism
- Mineral waters

The CTB could possibly be the based on which all countries and areas in question can, step-by-step create the new identity and image for the whole region, and not only for areas in Poland and the Ukraine.

#### **6.4 Actions in response to SWOT**

Regarding the crucial issues in development of sustainable tourism in the region, the following steps should be highlighted incorporating the recommendations from the country consultations.

Action	Activities	Parties involved	Timeframe	Note
<b>Definitions and Development of 'Unique Carpathian Experience'</b>	Analyzing the resources of the member-countries to identify the key-areas, products to be involved and make further detailed researches in the areas as follows: i. resources ii. products iii. 6A (attraction, accessibility, amenities, available packages, activities, ancillary services) iv. tourism flow, seasonality v. local distinctiveness (eg. natural value, local food, tradition, cultural values, agriculture and all.) vi. creation of a common database of trails, resources	Governments, NGOs, educational institutions, tourism companies – Task Force; CCC*	Up to 1 year	All countries underline the necessity to involve their respective governments as they all need to put more focus on development of tourism in Carpathians and include measures into documents and also support financially
	b. Identifying the differentiated position of the Carpathians	CCC; Task Force	Year 2	
	c. Creating brand values, and make a connection with the product-lines	CCC with creative agency	Year 2	
	d. Organizing of workshops and conferences on various levels: regional, inter-regional, international- networking and information sharing	CCC; Task Force	Bi-annually	

\*Carpathian Coordination Centre (see chapter 7.1)

Action	Activities	Parties involved	Timeframe	Note
<b>Sustainable product-development</b>	Zoning the key-areas (eg. motorized, non-motorized, restricted) with focusing on carrying capacity issues	Nature protection agencies and NGOs	Year 1-2	
	a. Involving local communities in product-development and establishing a management organization in the key-areas to manage all the needed development as highlighted below: <ul style="list-style-type: none"> <li>i. sustainable transport (public transport, bus-transfers and parking places for decreasing the motorization)</li> <li>ii. green lodges (with a certification of international green labels)</li> <li>iii. involving local producers to sell local food, and products and supporting networking (so as to keep the tourism income in the region)</li> <li>iv. train the local service suppliers to understand the newest trends, visitor- and quality management, interpretation issues.</li> <li>v. Mapping scenic routes and train journeys</li> </ul>	Tourism companies, transport companies, NGOs, industry partners	Year 2-4	
	b. Pilot schemes/projects with ski and golf developers		Year 2-4	

Action	Activities	Parties involved	Timeframe	Note
<b>Sustainable product-development in details</b>				
	Skiing - Sustainable Slopes	destinations, ski lift operators, developers, national governments	Year 1-3	
	Rural tourism - Using local materials, products, building authentic, green facilities, identifying the unique experience promises of “Carpathians Rural Lifestyle”	destinations, NGOs, research institutions	Year 1-3	
	Slow movement - Sustainable agriculture, broaden the Carpathian Culinary Heritage Network	destinations, NGOs, research institutions, tourism companies	Year 2-3	
	Heritage tourism - Complex and balances supply of accommodation establishments at destinations; development of thematic roads	destinations, NGOs, research institutions, tourism companies, cultural institutions	Year 1-3	
	Geotourism - Sustainable management, maintainance of the paths, code of behaviour for tourists	destinations, NGOs, research institutions, tourism companies	Year 1-3	
	Adventure tourism - Sustainable management, maintainance of the paths, parks, code of behaviour for tourists	nature protection agencies, product makers, destinations	Year 2-3	
	Establishing the alternative “Via Carpatica” on a network of hiking and biking trails	Hiking and biking associations, destinations, nature protection agencies	Year 2-5	
	Ecotourism - Visitor management issues in national parks, green certification, code of behaviour for tourists	destinations, NGOs, research institutions, tourism companies	Year 1-3	
	Baths, mountain healing - Assuring access for locals, offering local products, therapies, treatments, preparing evidences (tests)	bath association, research organizations, health authorities	Year 1-5	
	Dark Sky Parks – designation, visitor management, code of behaviour for tourists	nature protection and forestry agencies	Year 1	
	Golf tourism - Applying the ‘Sustainable Golf Courses’ approach	golf developers, nature protection agencies	Year 1-3	

Action	Activities	Parties involved	Timeframe	Note
<b>Sustainable Management and organization</b>	Creation of the Carpathian Tourism Task Force	governments, destination, national tourist offices, nature protection and cultural heritage organizations	Year 1	
	Creation and financing of the Carpathian Coordination Centre (CCC)	Carpathian Convention, Governments and other stakeholders	Year 1	
	Supporting regional labels and through that the local economy. Hence in some countries there is a need to ensure bigger support for small enterprises from the government - creation of product packages – common thematic routes, defining and registering products.	governments, NGOs, nature protection and cultural heritage organizations	Year 1	
	Simplification of cross-border tourism, favorable visa regime, linking of trails- implementation of joint cross-border products	governments and NGOs, destinations	Year 2-3	
	Uniformed system of providing information – boards, marking of hiking paths, public transportation schedules etc.	Task Force; CCC	Year 2-4	
	Preserving the character of landscape authenticity, protection of tangible and intangible heritage and developing programs for promoting and funding the local cultural heritage- support of regional labels	nature protection and cultural heritage organizations, NGOs	Year 1 ongoing	
	Continuous education of local authorities and also tourists in sustainability issues- education programmes at schools, raising awareness of the public in regards to nature and history – strengthening local patriotism, implementation of system of eco-education for specialists and also service providers.	nature protection and cultural heritage organizations, educational institutions, NGOs, destinations	Year 1 ongoing	

	Ensuring regional governments will provide support for local tourism stakeholders - adjustment of legislation legal procedures and state support (mostly taxation system and subsidies).	governments	Year 1 ongoing	
	Creating a Carpathian-wide quality standard systems for “Local food”, “Local accommodation”, “Local experience – how to guide the tourists”, “Code of Behaviour for Tourists in the Carpathians” (so as to assure safety, green, and memorable experiences) and appointing the inspection body	CCC, Task Force, destinations, governments	Year 2	
	Creation of mobile applications, and special guiding-networks so as to assure the sustainable and memorable experiences.	destinations, NGOs	Year 2	
	Assuring support for local farmers to realize sustainable agriculture, drawing attention to bad land management and showing good examples of ecotourism, continuous ecological education of local communities, defining the level of danger and indicate highly protected areas carefully, determination and implementation of possible tools for financial contributions.	governments	Year 1 ongoing	
	Focusing on agro-tourism, maintaining specific local cultural land-use heritage – beekeeping, food production, changing ways on how the forestry is being handled by state and also private sectors, showing good practices.	governments, NGOs, destinations, nature protection and cultural heritage organizations	Year 1 ongoing	

Action	Activities	Parties involved	Timeframe	Note
<b>Branding and Communication of Unique Products and Experiences</b>				
	Creating the Corporate Identity (based on the brand values) to the Carpathians and make the usage of the logo, slogan compulsory for all those service suppliers, who joined and got labelled to the Carpathians product-line.	CCC, Task Force	Year 1-3	
	Starting introductory campaigns in the traditional as well as online communicational channels	national tourist offices, destinations	Year 2-3	
	Building a joint online platform for selling the labelled and marketable products of each country (or using a Destination Management System, eg. Newmind). Ensuring the link-contacts with the sites of NTOs, and assuring that the Carpathians products are communicated on their own sites as well	CCC, national tourist offices, destinations	Year 3	

## 6.5 Impact Assessment and Management

A large part of tourism management involves the assessment, the monitoring and the management of the impacts that tourism has on the natural and cultural environment.

Impact management means:

- Identifying the impacts of existing tourism activities
- Assessing these impacts, taking the viewpoint of sound tourism development and biodiversity conservation into consideration
- Predicting the impacts of the future tourism development
- Developing ways to monitor and react on impacts of existing tourism activities and of the future tourism development

The impact assessment is not only a question of professional analysis but also a subject of personal opinion. The evaluation should, therefore, be reviewed and discussed within the multi-stakeholder group and with the general public. Tourism activities that benefit one societal group may have negative impacts on other groups and the natural environment. The evaluation of impacts should, therefore, also be considered part of the decision-making process.

Various internationally accepted planning methodologies such as the Recreation Opportunity Spectrum (ROS), the Limits of Acceptable Change (LAC), Environmental Impact Assessment (EIA) and Social Impact Assessment (SIA) are useful for the planning and management of tourism development.

Impact management can include measures for the siting of tourism development and activities, measures to control tourist flows, the promotion of appropriate tourist behaviour and the limiting of the number of tourists (using the LAC method). The strategy describes the concrete measures either to avoid or to mitigate existing and potential negative impacts.

Impact management can be divided into the following steps:

- Definition of a clear set of indicators, that will be used to measure and assess the impacts
- Measuring of impacts (constant monitoring)
- Assessment of the monitoring data: are the impacts within the acceptable limits or not?
- Description of action plans which will become effective in case of unacceptable negative impacts
- Implementation of action plans

### 6.5.1 Impact Assessment in the Carpathians

Tourism destinations are the focal point of tourism activity. Eurostat data shows Europeans made just over one billion trips in 2011. The average trip spend was 347 euros; a total of 312 million euros in expenditure. This economic impact is felt in employment, increased tax revenues, successful business growth, environmental conservation, and cultural heritage protection. But every tourist also leaves waste behind, uses water and energy and has an impact on the communities they visit. Therefore, informed and collaborative destination management is essential for European tourism destinations to be viable in the long term.

Although definitions, agendas, guiding principles and regional strategies have been well established, there are few tools available to help local destination co-ordinators make informed decisions to improve the tourism in their destination.

Over the past two decades a number of sets of indicators have been applied at the international and regional levels, which are of certain use for measuring the positive as well as negative impacts of tourism in the Carpathians:

- Indicators of Sustainable Development for Tourism Destinations – A Guide Book (UNWTO; 2004)
- Criteria for Sustainable Tourism in Mountain Areas (ETE, UNESCO; 2007)
- Sustainable Tourism Indicators and Destination Management – Montenegro Workshop (UNWTO; 2007)
- Indicator System for ‘Sustainable Tourism Destinations’ (Tourism Sustainability Group (TSG), DG Enterprise and Industry; Final Draft November 2009)
- Global Sustainable Tourism Criteria (GSTC; 2012)
- European Tourism Indicator System – Toolkit for Sustainable Destinations (DG Enterprise and Industry; 2013)
- Tourism-specific Quality of Life Model and Index, TQoL (OTM, 2009)
- Hotel/accommodation performance benchmarking (STR, Xellum, etc.)

The Indicators Guide Book of UNWTO (2004) is for now the most comprehensive compendium and all later published sets of indicators are building, among others, on this guidebook.

However, for now, because of feasibility and applicability reasons a modified set of indicators, based on the TSG Indicator System, has been chosen for measuring the impact of tourism in the Carpathians. This set consists of 20 core indicators, which are supplemented by a number of detailed indicators. The detailed set of indicators is presented in Appendix 8.12:

1. Tourism Volume and Value	2. Tourism Enterprises Performance
3. Customer Satisfaction	4. Community/Social Impact
5. Quantity and Quality of Employment	6. Gender Equality
7. Equality – Accessibility	8. Reducing transport impact
9. Climate Change	10. Sustainable tourism management practices in tourism enterprises
11. Solid waste management	12. Sewage treatment
13. Water management	14. Energy Usage
15. Landscape and Biodiversity Protection	16. Lights and Noise Management
17. Inclusive Management Practices	18. Development Control
19. Tourism Supply Chain	20. Protecting and enhancing local cultural identity and assets

During the testing phase of this set of indicators, it is recommended to further improve each indicator and to develop a system of “voluntary” and “obligatory” indicators, which

contributes to the achievements and development stages of destinations and the entire Carpathian region.

### **6.5.2 Data gathering system to measure impacts**

For too long, local policy makers have relied on a limited range of statistics such as visitor arrival numbers, employment surveys, and visitor satisfaction ratings to monitor tourism in their destination. These statistics do not tell the whole story of tourism's impacts. Collecting data on a broad range of issues relevant to the impact of tourism on local economy, community, and environment will help destinations build an accurate picture of what is really going on.

To collect information on each agreed indicator is not an easy task to accomplish, especially if data should be collected each year. Therefore, indicator systems tend to stay normally at a more general level (e.g. tourists arrivals, overnight stays, spending per day, etc.). However, with these systems the real impacts on the ground, either positive or negative, caused by tourism, cannot be measured and consequently no actions can be taken in order to minimize negative effects and to maintain or increase the positive.

Because in the Carpathians there is no established system of destinations and Destination Management Organizations (DMO), the challenge to gather sophisticated sets of data becomes rather unrealistic at this stage. However, if all involved governments and stakeholders choose a step-by-step approach, the collection of data and reporting becomes feasible. Therefore the following approach is recommended:

#### Phase 1 (2015)

1. Choose one destination in each of the seven countries, which is representative for tourism development in mountains in the Carpathians.
2. Collect data according to the set of indicators. (For surveys the templates of the Tool Kit of DG Enterprise – 2013 – can be used)
3. Apply TQoL methodology
4. Deliver the data to the national statistical office for further processing
5. Launch hotel/accommodation performance benchmarking (online system to indicate impacts of events, festivals, etc.). Present quarterly data.
6. Deliver the data to the Carpathian Coordination Centre for reporting

#### Phase 2 (2016-2020)

7. Review set of indicators according to lessons learned in the destinations
8. Establish a number of destinations, which cover the entire region of the Carpathians (if necessary establish trans-boundary destinations)
9. Collect data in each destination according to the revised set of indicators
10. Apply TQoL methodology to indicate changes
11. Deliver the data to the national statistical office for further processing
12. Deliver the data to the Carpathian Coordination Centre for reporting
13. First comprehensive report on "Tourism Impacts in the Carpathians" is accomplished in 2020

Phase 3 (2021 -)

14. Review set of indicators according to lessons learned in all the destinations
15. Implement data collection and reporting in all destinations according to the steps in phase 2 items 7-9.
16. Publish a report on “Tourism Impacts in the Carpathians” in intervals of 4 years.

The below chart visualizes the levels of data collection and reporting on the impacts of tourism in the Carpathians:



With regards to synergizing ongoing initiatives towards indicators on sustainable reporting, regional, EU-level and global reporting, it will be necessary for the Carpathians to cooperate with e.g. EUROSTAT and the UNWTO Tourism Satellite Account (TSA), so that data gathered in the Carpathians can be compared with other regions in Europe and the World. These initiatives will in the future certainly lead to potential benchmarking of the performance of destinations and increase the competitiveness of the Carpathians as a mega-destination.

In order to further improve the set of indicators it is also recommended to cooperate with the World Tourism Organization (UNWTO) on two specific initiatives:

1. Regional Workshop on Indicators for Sustainable Tourism in Destinations

During the past decade UNWTO has organized a number of workshops at country level on the elaboration of a set of indicators, which are specific to that respective region. These workshops haven proven to be very successful and the indicators are used for data gathering and reporting. The Carpathian countries could initiate a process for such a workshop, organized by UNWTO; in order to develop and/or review the here proposed set of indicators.

2. UNWTO Laboratory on Sustainable Tourism in the Carpathians

The establishment of a number of laboratories, initiated by UNWTO, seems to become a successful tool to measure impacts of tourism in certain regions. Universities with guidance of UNWTO operate the currently established laboratories running in China and Greece. In combination with the Carpathian Cooperation Centre

(to be established in 2015), a laboratory in the Carpathians could boost and streamline the tourism impact assessment and management in the entire region.

## 6.6 Monitoring and Evaluation

Monitoring means constantly checking if the implementation of the goals, objectives and the work program of the strategy are carried out properly and whether they have the intended effects. Monitoring and its results should help to form decisions about how the plan should be managed in the future.

Country consultations made it very clear that the proper monitoring and evaluation is expected including:

- a. Creation a joint monitoring standard system and a benchmark-platform so as to monitor the following issues:
  1. Quality of the visitor experience
    - Length of stay at the site or area.
    - Number of visitors.
    - Bed nights/room occupancy.
    - Questionnaire response to set questions on levels of enjoyment/satisfaction.
    - Questionnaire response to questions about perceived overcrowding.
  2. Economic factors
    - Spend per head of visitor.
    - Total visitor spend per year.
    - Estimated number of jobs supported by visitor spending.
  3. Community factors
    - Number of planning applications received/granted/refused.
    - Number of complaints received by local authority from locals and visitors.
  4. Environmental factors
    - Air and water quality.
    - Noise levels.
    - Amounts of litter.
    - Number of historic buildings at risk.
    - Impact of tourism flow in the different areas
    - Visual assessment of the quality of the urban scene by zone

- Visual assessment of the state of the habitat/landscape by zone
- b. Based on the continuous impact-analysis, careful impact-management. Establishing responsible bodies for monitoring in each country
- c. Incorporating of legal and operating tools allowing flexible changes – finance support, development of traditional types of economies - keeping the bodies of Protected Areas informed and allow them to comment

The tasks completed and the impacts it causes have to be monitored at different timescales (see chart). The short-term review evaluates whether the work program has been carried out. The medium-term review evaluates the outcomes of the plans objectives and the long-term review verifies the impacts of the work and therefore how well the goals have been achieved. The review should evaluate the impacts related to the overall goals of the strategy and the strategies of the seven Carpathian countries.

Monitoring timescales		
Short-term	Every day evaluation of work plan implementation	1 year
Mid-term	Evaluation of effectiveness of outcomes for meeting the objectives	5 years
Long-term	Evaluation of positive effects of the entire strategy	10 years

### 6.6.1 Measuring the performance of strategy implementation

For measuring the performance of the strategy goals, objectives and actions it is necessary to set clear “milestone” indicators, which are subject to reporting and to review the strategy as mentioned in the previous chapter.

This strategy has outlined a number of targets (Goals and objectives), which should be accomplished in a given period of time. These targets are presenting the milestones for achieving the strategy in parts or as a whole.

The Carpathian Coordination Centre can use the following set of performance indicators in order to present the success of implementing sustainable tourism practices in this mountain region (order and timing is subject to change):

Performance Indicators	Target Year
1. A coordination centre for product development, promotion, marketing and monitoring is established and operating. The Task Force	2015
2. Small and micro businesses are supported by organizational systems and incentive policies.	2016
3. Governments adjust their voluntary and legal frameworks for the support of sustainable tourism based on common	2017

assessments. *	
4. A properly managed network of hiking, biking, skiing and horse riding trails is established, distinguishing between Carpathians wide and local destinations.	2017
5. Products and services follow common quality standards and are integrated into a labelling system (The Carpathian Experience)	2017
6. A network of ecotourism destinations is established.	2017
7. A common brand is created for touristic products and destinations in the Carpathians. All destinations in the Carpathians have an effective management and DMO following a set of sustainability criteria (tourist hubs).	2017
8. A number of products (STP – sustainable tourism products) are promoted at the regional as well as global tourism-related markets.	2018
9. Governmental sectors support the proper sustainable use of authentic landscapes and wilderness areas with associated tourism infrastructure, which forms the foundation of any tourism operations.	2020
10. An information system is established throughout the Carpathians providing online solutions, and data for monitoring and for visitors at the same time.	2020
11. Carpathian service providers are successfully communicating to tourists the value of this mountain region based on a code of conduct.	2022
12. A number of laboratories and incubators as learning institutions on sustainable tourism practices for providers and communities are established	2023

\* For indicator 3 it is recommended to adopt and use the “Methodology for the Assessment of National Tourism Strategy” (CEEweb; 2013), which has been proven to be an efficient tool for the evaluation and review of voluntary and legal national tourism documents. The methodology can be found on [http://www.ceeweb.org/wp-content/uploads/2012/08/CEEweb\\_STWG\\_NTDS-Assessment-Methodology-final1.pdf](http://www.ceeweb.org/wp-content/uploads/2012/08/CEEweb_STWG_NTDS-Assessment-Methodology-final1.pdf).

### 6.6.2 Feedback mechanisms

The monitoring process should consider the whole set of tourism activities and impacts (social, economic, environmental and cultural) addressed in the strategy. Monitoring consists of three consecutive steps: data collection, evaluation and reporting. As evaluation and reporting are therefore depending on the data collected, the in-depth compilation of valid data forms the basis of a good monitoring system.

In order to guarantee the good quality of data, the strategy should provide for a standardised data collection process, including a determined set of indicators, which will also

be used in the phase of evaluation. This will allow for a reporting system that is able to consider also changes occurring gradually in the course of time.

Another important factor is the involvement of stakeholders at clearly defined levels in the Carpathians. Due to their local knowledge and because not all monitoring can be accomplished by external experts, the stakeholders can decisively contribute to the success of the monitoring process, e.g. by collecting data and delivering reports.

The strategy should include time schedules, responsibilities and resources of monitoring. Monitoring should consist of a combination of internal and external audits. That means, that the data collected should be evaluated by internal experts of the Carpathian Coordination Centre and/or other participating institutions, as well as by external experts, who are not responsible for the implementation of the strategy (Sustainable Tourism Management Planning (ETE, UNESCO, 2007)).

## 7 IMPLEMENTATION

The following chapters will contribute to the discussion during the various meetings on finalizing this strategy from the point of view of implementation arrangements until March 2014. As the seven Parties of the Carpathian Convention have requested the “Strategy for the Future Sustainable Tourism Development”, consequently the governments may launch the initiative for the effective and efficient implementation of this strategy.

### 7.1 Institutional Arrangements

- ⇒ The governmental institutions (e.g. Ministry for Tourism, Ministry for Economy or Ministry for Regional Development) should appoint a **Focal Point** who will communicate tourism specific topics to the Carpathian level and within its own country for further implementation. This is to avoid overlaps with other initiatives and creating synergies wherever possible.
- ⇒ The governmental institutions (e.g. Ministry for Tourism, Ministry for Economy, and Ministry for Regional Development) responsible for tourism and those responsible for the environment should establish the **Carpathian Tourism Task Force**. Other institutions from the seven countries working in the field of tourism development, education or business should be invited to join this task force. Aim of the task force is to monitor the effective implementation of the Carpathian Tourism Strategy and to formulate recommendations to the Carpathian Coordination Centre on the further improvement of the strategy itself.
- ⇒ The governmental institutions, with the assistance of other major stakeholders in the Carpathians, should establish the **Carpathian Coordination Centre**. This centre has the aim to coordinate the implementation of the strategy with the following core activities:
  - Product Development
  - Branding and Certification
  - Marketing and Promotion
  - Capacity Building of Businesses and Destinations
  - Quality Assessment
  - Fundraising

### 7.2 Financial Arrangements

- ⇒ Within the next 5-10 years it is envisaged that the implementation of this strategy becomes a **self-financing initiative**, which is to a great extent sustainable business driven (membership and certification payments). However, in order to ensure a quick start-off phase in 2015 for the implementation of this strategy, there is a need for voluntary financial contributions from the seven governments in the Carpathians.
- ⇒ It is recommended that each **government send one tourism expert** for the period of 2 years to the Carpathian Coordination Centre. The expert would be “seconded”,

meaning paid by the governmental budget for that period. Specific Terms of Reference will be developed on product development, marketing, monitoring, and fund raising to contribute to the aims of the centre.

- ⇒ In the best case each government should agree to contribute a part of their **tourism marketing budget** calculated by the size of geographical delimitation of the Carpathian Tourism Strategy within its territory. Terms of Condition will be developed for the effective use of these funds in the Carpathian Coordination Centre.
- ⇒ In parallel, the Carpathian Coordination Centre, if fully equipped with the above arrangements, will start **fund raising initiatives** and business driven approaches in order to put the strategy implementation on a solid platform.

### 7.3 Time Frame and Reporting

- ⇒ The implementation of the strategy is envisaged for a 10 years time frame, which is further described in chapter 6.6.1 *Measuring the performance of strategy implementation*. This gives proper time to prepare for the entire review and update of the strategy.
- ⇒ The *Actions in response to SWOT* in chapter 6.4 cover currently a time frame of 1-5 years. Within this period the effective implementation of the actions should be evaluated and if necessary adapted to changing conditions.
- ⇒ One part of the reporting is described in chapter 6.6 *Monitoring and Evaluation*, when it comes to the responsibilities of the (to be established) Carpathian Coordination Centre (CCC). In addition, reporting mechanisms need to be constructed to inform the Carpathian Convention Implementation Committee about the progress of implementation.
- ⇒ Another reporting initiative, which is currently not mentioned in the action plan nor in the monitoring chapter could be the so called Country Performance Reports, which inform stakeholders within a country about the progress of implementing the strategy. This tool might be helpful in order to raise awareness among the population on sustainable tourism and the Carpathian identity.

## 8 APPENDICES

### 8.1 Contributions required by the stakeholders on Carpathian wide actions/results and country specific actions/results

Measures	Carpathian wide	Country specific
Carpathian region is a sustainable tourism destination		
Regional tourism products		
Quality standards		
Contribution to local economy		
Managing tourist traffic		
Contribution to conservation of biodiversity		
Agriculture and forest management as sectors of special interest for tourism		
Transport and infrastructure		
Local cultural heritage		
Education and awareness on sustainability issues		
Experience exchange, information and capacity building		
Trans-boundary cooperation		
Managing impacts on biological diversity, natural, socio-economic and cultural environment		
Monitoring effectiveness of the strategy		
Common projects and programs		

## 8.2 Tourism demand in the Carpathian countries

### International Tourist Arrivals

International Tourist Arrivals by (Sub)region																									
	Full year					Share			Change			Monthly/quarterly data series (percentage change over same period of the previous year)													
	2000	2005	2010	2011	2012	2012	1009	11/10	12/11	2013	2012				2011										
	(million)					(%)	(%)			YTD	Jan	Feb	Mar	Apr	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4			
World	677	807	949	955	1,035	100	6.4	4.8	4.0	4.3	2.4	5.3	8.1	1.6	5.7	3.8	2.9	4.8	4.4	6.6	4.4	3.7			
Advanced economies <sup>1</sup>	420	459	506	530	551	53.2	5.3	4.7	3.8	3.3	0.2	5.9	7.3	0.1	6.2	3.7	2.8	4.1	4.0	6.2	4.1	4.6			
Emerging economies <sup>1</sup>	256	348	443	425	484	46.8	7.8	4.9	4.3	4.6	3.7	3.5	7.7	3.4	5.2	3.9	3.1	5.6	4.8	7.2	4.7	2.9			
<i>By UNWTO Regions:</i>																									
Europe	338.0	403.9	455.6	516.4	539.2	51.6	3.0	6.4	3.4	4.9	1.9	7.2	9.0	2.2	4.5	3.2	3.2	4.5	6.4	8.3	4.8	5.1			
Northern Europe	46.4	60.4	62.8	64.0	64.9	6.3	2.1	2.0	1.4	2.1	-0.8	9.9	3.5	-2.1	4.8	2.4	-1.7	5.5	3.0	7.0	-0.4	-1.0			
Western Europe	139.7	141.7	154.4	151.5	155.6	16.1	3.9	4.6	3.2	3.6	-1.2	5.2	10.0	0.3	5.0	3.2	1.9	3.9	8.4	5.4	1.7	6.2			
Central/Eastern Eu.	69.3	90.4	95.0	103.9	111.6	10.8	3.1	9.4	7.4	8.9	8.2	10.1	9.7	7.9	8.0	8.0	7.7	8.4	7.4	9.5	6.6	8.0			
Southern/Mediterr. Eu.	132.6	155.4	173.5	177.0	191.1	18.5	2.5	7.8	2.2	4.6	1.7	6.0	9.7	1.7	1.3	1.0	3.5	1.9	5.2	10.6	8.3	4.6			
- of which EU27	326.8	395.1	371.0	390.9	402.2	38.7	2.7	5.4	2.4	2.8	-0.4	5.3	7.3	-0.6	4.2	2.1	1.7	3.0	5.9	7.6	4.0	4.4			
Asia and the Pacific	110.1	153.6	205.1	218.2	233.6	22.6	13.2	6.4	7.0	6.3	4.7	6.9	10.3	3.4	8.8	7.8	5.0	7.8	4.8	6.0	8.1	6.9			
North East Asia	58.3	85.9	111.5	115.8	122.8	11.9	13.8	3.8	6.0	2.3	1.8	1.7	7.1	-1.5	8.5	8.6	5.4	2.3	2.1	0.7	5.1	7.3			
South East Asia	35.1	48.5	70.0	77.3	84.6	8.2	12.5	10.4	9.4	12.1	9.2	13.2	15.1	10.7	10.0	7.2	3.8	16.6	7.7	14.1	14.1	6.3			
Oceania	9.6	11.0	11.6	11.7	12.1	1.2	6.1	0.9	4.1	3.9	-1.8	7.8	8.8	0.3	4.5	5.2	2.9	4.0	-0.4	0.7	0.2	2.9			
South Asia	6.1	8.1	12.0	13.5	14.1	1.4	13.5	12.6	4.6	8.7	6.2	9.6	10.3	8.9	8.2	6.2	11.7	8.9	16.0	17.9	10.2	10.4			
Americas	128.2	133.3	150.6	153.0	163.1	15.8	6.6	3.6	4.6	0.5	1.2	0.3	2.9	-2.5	7.1	3.1	3.9	4.0	2.4	5.6	3.2	2.7			
North America	91.5	89.9	99.5	102.1	103.7	10.3	7.0	2.6	4.5	0.6	2.2	1.8	1.4	-2.5	7.9	2.1	4.0	4.6	0.4	4.8	3.2	1.6			
Caribbean	17.1	18.8	19.5	20.1	20.9	2.0	1.6	3.0	3.8	-1.0	-0.9	-3.8	3.2	-3.1	3.9	4.4	2.8	1.2	2.6	3.6	1.3	4.1			
Central America	4.3	6.3	7.9	8.3	8.9	0.9	4.0	4.4	7.5	4.2	2.9	3.4	6.6	4.1	8.0	7.8	5.9	8.1	2.7	4.2	2.8	4.7			
South America	15.3	18.3	23.6	25.5	26.7	2.6	10.2	7.8	4.7	0.3	-0.2	-1.2	6.3	-4.0	7.2	4.7	3.4	2.3	8.1	12.6	5.3	4.9			
Africa	26.2	37.8	49.9	49.4	52.4	5.1	8.7	-0.9	5.9	1.8	-1.4	0.0	8.8	0.2	2.5	5.7	6.8	1.5	5.3	-1.6	-1.8	2.5			
North Africa	10.2	13.9	18.8	17.1	18.5	1.8	6.7	-9.1	8.7	-0.1	-1.6	-3.2	8.4	-3.8	9.5	11.8	8.9	4.5	-11.1	-8.6	-11.9	-3.4			
Subsaharan Africa	16.0	23.9	31.1	32.4	33.8	3.3	10.0	4.1	4.4	2.6	-1.3	1.3	9.0	2.4	0.0	2.2	5.2	0.2	12.9	2.8	6.8	5.4			
Middle East	27.1	36.3	53.2	57.9	62.0	5.0	11.6	-5.6	-5.4	4.7	3.7	5.8	7.6	2.0	-0.8	-5.0	-13.9	0.1	-4.9	2.8	-3.9	-11.7			

Source: World Tourism Organization (UNWTO) © (Data as collected by UNWTO, June 2013)

<sup>1</sup> Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2012, page 177, at <http://www.imf.org/external/pubs/ft/weo/2012/01>.

See box at page/Annex 1 for explanation of abbreviations and signs used

Source: UNWTO, 2012, 2013

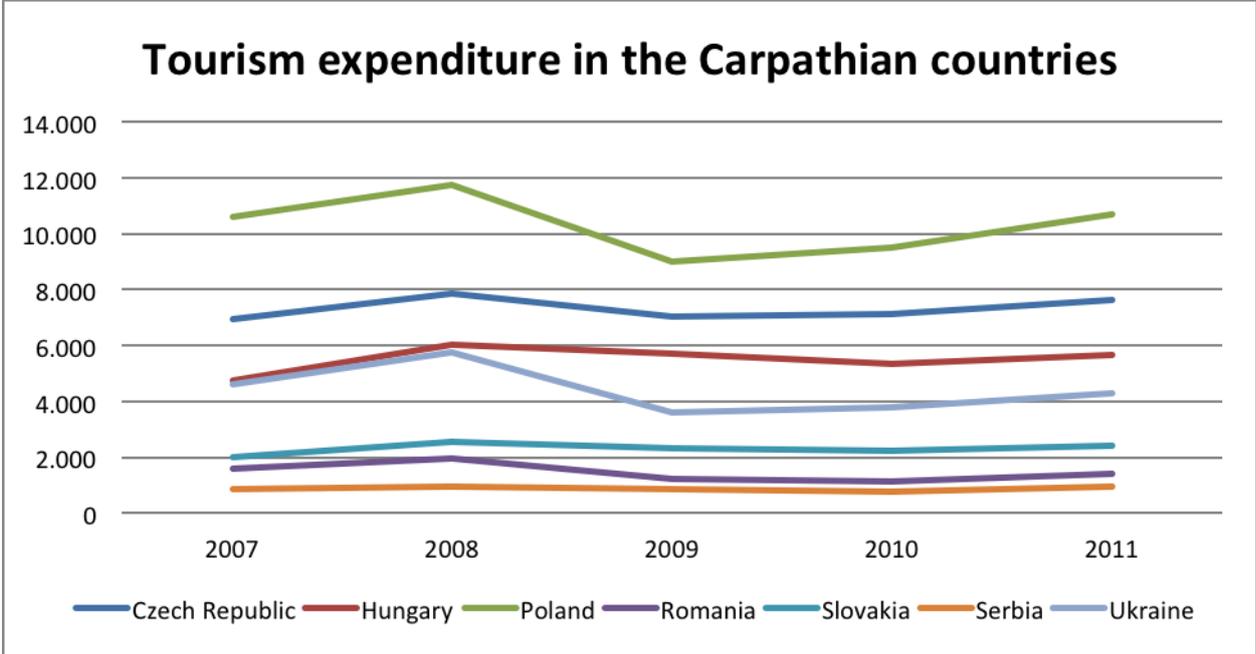
As Rätz (2004) stated, traditionally, the region had a strong relationship with the Western part of the continent, but after WW2, the whole area became part of the socialist block. Certain traditional tourist activities such as golf or tennis as well as visiting religious sights were discouraged. Tourism itself as a leisure industry was partly considered an unnecessary luxury, and priority was given to state or trade union-supported 'social tourism' (i.e. from the early 60's, the new system established a state or trade union owned and managed holiday resort network, with special regulations and restrictions, in order to provide a holiday experience for hard-working citizens).

Trade unions played an important role in the allocation of supply and the management of these services. The network mainly included domestic (mainly health and lake-side) resorts, though trips to the other socialist countries were also available, provided by the state-owned tour operators (e.g. Cedok, IBUSZ, Orbis). For children, so called 'pioneer camps' were offered, a sort of substitution of scout camps, usually at lakes or seaside or in mountain regions.

All these regulations contributed to the development of a strong domestic tourism in the socialist countries, but it was an artificial situation. Since the collapse of the system, intra-regional and domestic tourism have been heavily affected by the economic downturns (and upturns). This has been especially true for cross-border trips, which mainly motivated by different price levels on the two sides of the given border.

Based on the UNWTO (2013) Factbook data, the followings statistics were collected and summerized from each country (though some of the information can be biased, eg. the total number of overnight international tourists of Ukraine, or the number of accommodation in Poland). Please find the tables in point in the Appendix.

**Statistical information about the Carpathian countries**



Source: based on UNWTO, 2013

**Statistical information about the Carpathian countries**

	Czech Republic					Hungary				
<b>International</b>										
<b>Guests (ths)</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Total (ths)	26 743	26 628	23 285	21 941	22 153	39 379	39 554	40 624	39 904	41 304
Overnight visitors (tourists) (ths)	10 162	10 119	8 848	8 629	8 775	8 638	8 814	9 058	9 510	10 250
Same-day visitors (excursionists) (ths)	16 581	16 509	14 437	13 312	13 378	30 741	30 740	31 565	30 394	31 054
<b>Expenditure (USD, Mn)</b>										
◆ Travel	6 915	7 857	7 013	7 121	7 628	4 739	6 033	5 712	5 339	5 629
<b>Average length of stay (nights)</b>										
◆ For all commercial accommodation services	3.09	3.01	2.94	2.90	2.89	2.95	2.85	2.86	2.78	2.72
<b>Domestic trips (ths)</b>										
Total						..	..	..	..	..
◆ Overnight visitors (tourists)	28 481	28 010	27 850	27 614	29 847	..	21 753	17 920	18 123	19 062
◆ Same-day visitors (excursionists)	..	..	..	..	..	..	..	..	..	..
<b>TOURISM INDUSTRIES</b>										
<b>Number of establishments</b>										
◆ Accommodation for visitors	7 845	7 705	7 557	7 235	7 657	2 956	2 924	2 993	2 957	3 277
* of which, "hotels and similar establishments"	4 559	4 482	4 469	4 300	4 612	1 999	2 001	2 042	2 036	2 154
◆ Food and beverage serving activities	105 007	113 044	119 976	119 547	122 166	57 171	56 612	56 991	55 065	55 730
Tourism balance (inbound minus outbound tourism expenditure) over GDP (%)	2.3	1.8	1.9	1.9	1.8	1.9	2.1	2.8	2.7	2.8

	Poland					Romania					Slovakia				
	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011
<b>International</b>															
<b>Guests (ths)</b>											18 975	19 205	..	..	..
Total (ths)	66 208	59 935	53 840	58 340	60 745	7 722	8 862	7 575	7 498	7 611	7 269	6 643	..	..	..
Overnight visitors (tourists) (ths)	14 975	12 960	11 890	12 470	13 350	..	..	..	..	..	11 706	12 562	..	..	..
Same-day visitors (excursionists) (ths)	51 233	46 975	41 950	45 870	47 395	..	..	..	..	..	..	..	..	..	..
<b>Expenditure (USD, Mn)</b>											2 026	2 589	2 341	2 228	2 431
♦ Travel	10 599	11 768	9 011	9 526	10 683	1 610	1 991	1 229	1 136	1 420	..	..	..	..	..
<b>Average length of stay (nights)</b>															
♦ For all commercial accommodation services	2.90	4.00	4.16	3.94	3.96	2.30	2.30	2.09	2.05	2.02	..	..	..	..	..
<b>Domestic trips (ths)</b>											6 242	5 842	4 996	4 844	5 324
Total	..	..	..	..	..	..	..	..	40 884	41 004	..	..	..	..	..
Overnight tourists	34 900	34 900	30 800	33 900	29 600	9 294	9 716	11 651	10 797	11 986	..	..	..	..	..
Excursionists	..	..	..	..	..	..	..	..	30 087	29 018	..	..	..	..	..
<b>TOURISM INDUSTRIES</b>															
<b>Number of establishments</b>											2 449	2 734	2 961	3 126	3 011
♦ Accommodation for visitors	..	46.8	..	39.0	..	..	..	..	..	..	1 701	1 744	1 720	1 692	1 645
* of which, "hotels and similar establishments"	..	33.1	..	15.6	..	4 163	4 362	4 566	4 781	4 612	15 032	15 430	13 619	..	..
♦ Food and beverage serving activities	..	196.1	..	..	..	..	..	..	..	..	..	..	..	..	..
Tourism balance (inbound minus outbound tourism expenditure) over GDP (%)	0.8	0.4	0.5	0.2	0.5	0.2	0.1	0.0	-0.2	-0.1	0.7	0.4	0.3	0.2	0.1

	Serbia					Ukraine				
	2007	2008	2009	2010	2011	2007	2008	2009	2010	2011
<b>International</b>										
<b>Guests (ths)</b>										
Total (ths)	..	..	..	..	..	26 162	28 827	24 033	24 114	24 535
Overnight visitors (tourists) (ths)	696	646	645	683	764	23 122	25 449	20 798	21 203	21 415
Same-day visitors (excursionists) (ths)	..	..	..	..	..	3 040	3 378	3 235	2 911	3 120
<b>Expenditure (USD, Mn)</b>										
♦ Travel	864	957	869	799	991	4 597	5 768	3 576	3 788	4 294
<b>Average length of stay (nights)</b>										
♦ For all commercial accommodation services	2.12	2.16	2.28	2.13	2.15	5.85	5.53	5.72	5.44	4.97
<b>Domestic overnights</b>	5 853	5 935	5 293	4 961	5 002	53 569	52 409	47 063	42 900	40 228
<b>TOURISM INDUSTRIES</b>										
<b>Number of establishments</b>										
♦ Accommodation for visitors	869	918	931	967	975	4 530	4 668	4 725	4 742	6 174
* of which, "hotels and similar establishments"	634	670	687	721	731	1 420	1 595	1 684	1 731	3 162
♦ Food and beverage serving activities	18 830	19 708	20 987	21 551	20 609	4 648	5 028	4 785	4 744	4 751
Tourism balance (inbound minus outbound tourism expenditure) over GDP (%)	-0.5	-0.7	-0.3	-0.4	-0.3	0.9	1.2	0.5	0.4	0.3

### 8.3 Tourism product in the Carpathian areas

#### Tourism products in the Carpathian areas

Products	Czech Republic	Hungary	Poland	Romania	Slovakia	Serbia	Ukraine
<b>Skiing</b>	Ski center of Pustevny and Beskydy, Javorníky	shorter loops and smaller ski centres (Matra,Bukk, Borzsony mountains)	numerous skiing trails, and resorts in Beskidy &Tatra mountains	4 Romanian ski centre are highlighted interationally, there is an improvement of skiing resort in the project of Superskiing in the Carpathians	1,000 ski lifts and 30 cable ways in almost 100 ski centres. wide range of activities (Ski mountaineering, freeride skiing, dog sleigh)	n/d	6 ski-resorts highlighted
<b>Rural tourism</b>	high Nr of rural accommodation, n/d about development	private accommodation quite developed, authentic rural accommodation is rare, some good examples can be seen in the mountain areas	high Nr of rural accommodation, but only a few can be defined as authentic agri-touristic accomm., tour operators specialized for rural / geo tourism	recently improved a lot, most popular Alba County, special-international tour operators	47 rural and agro touristic accommodations (inc. eco-sites, ranches, diaries) are selected by the NTO, rest of them in the mountain regions, with a wide offer of additional touristic products, and green label	some marked private, mountain accommodation on the webpage of National Park Djerdap	strong folk culture, local products, and tasting tours
<b>Slow movement</b>	Slow Food Czech Republic	Slow Food Hungary	Slow Food Poland	Slow food Romania	Slow Food Slovakia (? only a Facebook site) Small Carpathian Wine Route	Slow Food Serbia	n/d
<b>Quality of life measurement</b>	n/d	Budapest Model (special index to TQOL)	specific research to Poland	specific research to Romania	n/d	n/d	n/d
<b>Heritage/culture</b>	Valachian Open-air Museum	4 UNESCO heritage sites	5 world heritage site (inc. Krakow)	plenty of world heritage sites (eg. castles in Moldva, Medieval Fortified Churches of Transylvania; Painted Monasteries of	more than dozen of UNESCO sites, castles, churches, natural values.	culture of Lepenski Vir, ancient and medieval monuments	cultural, historical towns, castles (eg. Mukachevo, Uzhorod) folk culture

				Bucovina) schools of art, painting			
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Products	Czech Republic	Hungary	Poland	Romania	Slovakia	Serbia	Ukraine
<b>Geotourism</b>	hiking, biking	hiking, biking, canoing, caving	hiking, biking, canoing	hiking, biking, caving, ranger camps	hiking, biking, caving, windsurfing	hiking, fishing, hunting, biking	hiking, biking, caving, horse riding, caving, kayaking
<b>Adventure tourism</b>	paragliding	paragliding, adventure caving	rafting, snow scooters, dog sledding Nordic cross skating	canyoning, rafting	hang-gliding, freeride, rafting,	n/d	rafting, balloon flights, caving
<b>Ecotourism</b>	mainly in protected areas, organised trips eg (butterfly tour: Hu-CZ-SK), n/d about events, campaigns	mainly in national parks, the development of infrastructure is varied, cave tours in Aggtelek National Park is unique	mainly in protected areas, national parks, the development of infrastructure is varied, as well as events, campaigns	mainly in protected areas, national parks, the development of infrastructure is varied, though there are 6 guide companies with eco-touristic offers	plenty of educational paths in and outside of national and natural parks (well structured information on the website of NTO, though ecotourism – as product – is not highlighted)	Visitor Centre in Donji Milanovac	mainly in national parks with well-established and stable, providing hiking trails
<b>Health tourism - climatology</b>	mineral spring (eg. Luhačovice)	climate therapy in Matra mountain (mofetta, sanatorium)	mineral springs (eg. Krynica Spa), salt therapy (Wieliczka – researcher of salt therapy: Feliks Boczkowski)	climate therapy in Sovata, Parajd, Băile Bálványos) though health tourism is not highlighted on the site of NTO (only clinical tourism)	several spa towns, mineral springs, climate therapy (eg. Spa Vysoké Tatry-Tatranské Matliare, Tatranska Polianka spa, Starý Smokovec)	Gamzigradska Banja – mineral spa	climatology, salt therapy at Solotvyno salt lakes
<b>Carpathians position</b>	The Carpathians is not highlighted on the website of National Tourism organization (NTO) information is rare, and diffused.	The Carpathians is not highlighted on the website of National Tourism organization (NTO) information is rare, and diffused.	Several offers of guided tours, tour operators focuses on Polish Carpathians, as well as Lonely Planet, but the Carpathians as entity is not highlighted on the webpage of NTO, information is diffused.	“Explore the Carpathian garden” brand slogan of Romania	Mountain tourism, and the Carpathians’ position is highlighted on the website of NTO	The mountain regions are highlighted, Carpathians are mentioned among them, the information is very diffused on the website of NTO	Highlighted among the 10 most see destinations in Ukraine on the website of NTO, though not supported by maps, further information

## 8.4 Natural resources in the Carpathian countries

Natural resources	Czech Republic	Hungary	Poland	Romania	Slovakia	Serbia	Ukraine
<b>National parks, protected areas</b>	3	14	19	21	20	1	19
<b>Health tourism resources</b>	spa town of Luhačovice (respiratory illnesses)	spa towns and wellness hotels in the mountain regions (as Eger, Visegrád) and climate therapy in Matra	10 spa towns (eg. Rabka, Krynica - mainly mineral spring, but salt, climate therapy as well!)	plenty of spas (eg. in Harghita-mountain) climate therapy in Sovata, Parajd, Băile Bălványos) though health tourism is not highlighted on the site of NTO (only clinical tourism)	several spa towns, mineral springs, climate therapy (eg. Spa Vysoké Tatry-Tatranské Matliare Tatranska Polianka spa, Starý Smokovec)	Gamzigradska Banja – mineral spa	mineral healing spas (eg. Lumshori)
<b>Nature trails</b>	several hiking trails	several education trails, though the quality of hiking trails varies a lot	hiking trails, guided hiking trips, specialized tour operators	network of marked paths and trails mainly in national parks	network of hiking trails (well structured, deep information on the website of NTO)	hiking trails, visitor centre	groomed hiking trails or signs are very rare
<b>Biking paths</b>	several biking trails	biking trails popular mainly in the Danube-bend, and mountain biking in the mountain regions	bike trails at different level, type	organized adventure biking tours, “Dealul Mare Cycling Route” developed by Carpathians Tourism Cluster	long-distance, marked cycling paths	Eurovelo 6	organized cycling tours (mainly automobile roads)
<b>Sustainable tourism – strategic point of view</b>	Sustainable tourism is highlighted in the national strategy, eco-certification is under development, while Czech service quality system is under implementation	Sustainable tourism is highlighted in the national strategy, eco-certification of hotels, different certifications of destinations are improved locally	Sustainable tourism is highlighted in the national strategy, green hotel certification	Sustainable tourism is highlighted in the national strategy, two labels awarded for sustainable tourism products (Ecotourism Certification System, and a new one under development)	Sustainable tourism is highlighted in the national strategy	Sustainable tourism is highlighted in the national strategy (Low on Tourism)	Sustainable tourism is highlighted in the national strategy (Low on Tourism)

## 8.5 Megatrends of Tourism in Europe to the Year 2005 and Beyond

### Key challenges:

- **Demographic:**
  - Increasing division between time-rich and money-rich markets
  - Growing but more and more pressured leisure time
  - Number of trips growing but average length shrinking
  - Ageing population and increasing concern for health
  - Youth market seeks more active (adventure) holidays
  - Increasing demand for independent holidays
- **Environmental Issues:**
  - Readiness for crisis management and crisis recovery systems
  - Changes in tourist flows, i.e. popularity of so far off or low-seasons grow
  - Growing costs of maintaining basic 'natural' resources, e.g. beaches, ski areas
  - Growing likelihood of the introduction of climate and emission taxes
  - Rising demand for 'eco-tourism' and nature-based holidays
  - Information of and developments for sustainability
  - Increasing need for 'natural' (and local) products
- **Macroeconomic trends**
  - More and more competitive global environment
  - Rise of new destinations
  - Values influenced by globalisation and will lead to increasing number of 'global nomads'
  - Growing mobility affect tourism labour markets
- **Political factors**
  - Governments need to co-ordinate travel advisory services and draw up crisis recovery plans and systems
  - Destination image is linked more and more to health and safety
  - Raising retirement age levels may low down the growth of travel by seniors
  - Consolidation of internet offers
- **Culture**
  - Rising educational levels may lead to increasing need for cultural services
  - Motivations shift towards general interest, rather than very specific cultural goals
- **Travel experience**
  - More and more experienced travellers demand higher quality experiences
  - Fewer repeat visitors may make difficult to build loyalty

- Tourists may want to get rid of their “tourist” label
- Development and increase of ‘volunteer’ tourism
- **Lifestyle**
  - Travel is no longer luxury, it is accepted part of life
  - Need to develop more niche products
  - There may be less demand in some markets because travel will lose its ‘cachet’
  - Search for different experiences
  - Demand for spiritual, health and spa products grows
- **Marketing trends**
  - Growing influence and role of the internet
  - Need to know more about motivations and interests as well as more needed to be done about segmentation and positioning
  - Necessary to identify and exploit USPs and well as Unique Experimental and Symbolic Selling Propositions (UESPs and USSPs)
  - Focus on tailor-made and personalised products
  - Initiatives for ‘budget’ travel products and ‘trusted’ brands
  - New roles of travel agents and operators in the search for ‘added value’
- **Information Technology & Communications**
  - Growth of cheaper worldwide communications
  - Connections with other communities
  - Channel for searching for events and activities
  - Introduction of new search and mapping services
- **Transport trends**
  - Development of budget travel may help new destination to emerge
  - Opening of new air routes lead to development of new visitor markets
  - Not easily accessible destination may suffer
  - For shorter trip rail can become significant competitor to air travel
- **Second homes – residential tourism**
  - Growth in the self-catering holiday rental markets
  - Need limits to new development (European Travel Commission 2005)

## 8.6 Major Global Consumer Trends by GfK

GfK Roper Consulting (2007) introduced the key 18 current major global consumer trends identified in the Roper Reports as the product of 30,000 face-to-face interviews carried out each year with consumers in 25 different markets going back to 1997. The trends have been categorized in four key areas that drive consumer behaviour: geography, lifestyle, life stage and personal values. Indeed, many trends may be contingent on several of these factors at the same time.

### Geographic trends

#### 1. west to east and vice versa

Globalisation is entering a new phase. The emerging markets are no longer unknown blank spaces. Meanwhile, countless competitors have sprung up to challenge the traditional manufacturers in markets established over decades. This means that new products and services are not only migrating from West to East, but also from East to West and, consequently, we not only find the US Starbucks café chain in Beijing, for example, but also Chinese brand Haier refrigerators in Stockholm.

### Lifestyle trends

#### 2. home is where you are

Consumers use up-to-date technology everywhere, not just at home. They have access to modern technology and communication. For example, music and video products are now available in portable versions that allow similar experiences whether at home or on the go. Just think of MP3 players, iPods, the Blackberry mobile hybrid or the mobile operating system, Windows Mobile.

#### 3. convergence means flexibility

Convergence means “one for many” not “all for one”. For example, consumers watch movies in the cinema, at home on DVD, on their PCs and laptops, on portable DVD players or on other transportable devices like portable Playstations. Multiple platforms and a variety of technical options allow consumers to define and interact with their world in the way that is most convenient to them.

#### 4. mixing influences

Consumers all over the world are becoming more open to new taste experiences, although many of them are still very cautious about this. The increased level of interest in eating different foods is fuelled by long haul travel, TV cookery programs and different types of new restaurant. In the UK, for example, consumers are even invited to try fusion foods and exotic combinations like Tandoori chicken pizza.

#### 5. the pursuit of wellbeing

More than ever before, consumers know what they are supposed to do to live a healthy lifestyle. However, even with the best of intentions, many still find it hard to put this knowledge into practice. On the one hand, this inner ambivalence is mitigated by products which make it easier for consumers to lead a healthier lifestyle and on the other hand, we are seeing advertising messages pointing out that not everyone wants to live healthily all the time.

## **6. life on the go**

Consumers live mobile lifestyles. This does not mean that they are permanently on the move, but that international travel, shuttling between work and home, vacations and leisure all lead to mobility of attitude and mind as well as body. Clearly, there is overlap between this trend and the home is where you are trend, which is more about how technology can help those with mobile lifestyles to do similar things wherever they are. On the other hand, “life on the GO” also touches all other consumer goods categories. Foods like breakfast bars which are packaged to be eaten on the move are a perfect example of this consumer trend.

## **7. pragmatic materialism**

Consumers all over the world are becoming increasingly demanding. More and more, they want products which combine a number of positive features. Confectionery now has to be both tasty and healthy, a handbag must offer luxury at an affordable price, a pair of shoes must be comfortable and high quality, a computer game must offer connectivity and privacy.

## **8. new 4 old media**

Broadband cable has long ago surpassed dial-up and has already become the standard in growth markets like China and India. Unlike non-internet users and narrowband users, broadband users spend considerably more time online than with the traditional media.

## **9. word of mouth propaganda**

On the one hand, consumers are bombarded by advertising, which is often more cynical and less credible than it actually purports to be but on the other, consumers are under constant pressure of time and confronted by a vast spectrum of product choice. Consequently, consumers are avid for information which has been filtered. Word of mouth propaganda fulfils this need to the extent that consumers can trust the reduced volume of information from tried and trusted sources.

### **Lifestage trends**

#### **10. the changing household**

Over the past thirty years, the traditional nuclear family with a father, a mother and two children has become the minority. Conversely, the number of singles households, one-parent families and childless couples is rising. The importance of advertising and product development based on stereotypical clichés is subsequently becoming less relevant in today's society.

#### **11. an ageing population**

It is a well accepted fact that we are living longer, having fewer children and that, as a result, our societies are becoming increasingly geriatric. But what is old? What implications does ageing have for our lives? What does it mean for people who are already older right now? And how will the altered circumstances affect today's young people as they age? We need to start thinking about the answers to these questions now.

#### **12. urbanization and migration**

For the first time in history, 50% of the global population is urban. Third world countries now account for over 50% of global GDP. Both these upward trends are likely to rise further.

#### **13. as busy as can be**

Today's consumers lead extremely busy and complicated lives. For many, the everyday reality is a case of juggling home and work with other commitments. Work and life are not always in balance. For parents, particularly working women, this balancing act is often extremely exhausting and a major cause of stress. However, in the past few years, we have seen – at least in the Western world – the beginnings of an escalating resistance to the long working hours which have become the norm in recent times. On the other hand, in the developing nations, there is a growing conviction that working long hours will improve personal situations.

## **Value-based trends**

### **14. the desire for authenticity**

Some consumers are tending to resist products which they regard as over-hyped. There has been a focus on real craftsmanship and authentic products, on experiences over simple possessions.

### **15. striving for success**

In rapidly developing countries like China and India, there has been a massive shift towards striving for and the achievement of success.

### **16. global anxiety**

The previously unprecedented volume of global media and 24/7 news coverage has concentrated global attention on the serious issues of the day as never before: SARS and H5N1 pose a threat to health, Al Qaeda and Bin Laden are a present danger to public safety, outsourcing jeopardizes the economy and climate change threatens the entire world.

### **17. in pursuit of relaxation**

The more frantic life becomes, the more people try to escape its stresses and strains. People long to switch off and relax. Satisfying this need includes anything from low key relaxation to hardcore partying. This desire to switch off is not limited to the industrialized nations, but is evident everywhere. The more the standard of living of the middle classes rises in the developing countries, the more consumers pursue the symbols of a successful lifestyle.

### **18. consumers in control**

Consumers know exactly what they want. Given the opportunity, they are the best product developers. Ultimately, it is consumers who will decide how and which products meet their expectations. For example, in its advertising campaign, UK mobile phone company, Vodafone, invites consumers to "Create your own price plan!"

## **8.7 Babia Gora Declaration on Sustainable Tourism Development in Mountain Areas "Tourism in Mountain Areas and the Convention on Biological Diversity"**

### **Recommendations for the Implementation of Sustainable Tourism in Central and Eastern European Countries**

#### **General:**

1. The implementation of sustainable tourism should be based on long term strategies.
2. There is a need of capacity building of all stakeholders, especially authorities at all horizontal and vertical levels.
3. Local model projects should receive full support at the relevant local, national and/or international levels.
4. With regard to the distribution of information, there should be information exchange at all horizontal and vertical levels.
5. To achieve sustainable tourism, it is essential to develop and use indicators, to set up monitoring systems and promote research on carrying capacity.
6. Technical assistance should be provided by scientists/experts to local research and monitoring, as well as feasibility studies should be supported and promoted.
7. The external costs of tourism activities should be internalised in tourism prices at the local level, based on regional co-operation agreements.
8. Effective synergies between the Convention of Biological Diversity and other multilateral environmental agreements, inter alia, should be encouraged through the development of joint plans and programs, with due regard to their respective mandates, regarding common responsibilities and concerns.
9. The Convention on Biological Diversity and its provisions, including the active follow-up of its work programs and decisions made through national action programs, should be integrated into the programs and policies, in particular of the economic sectors of the countries, including initiatives which promote community-based sustainable use of biological diversity, and their integration into relevant cross-sectoral strategies, programs and policies should be strengthened.
10. The conservation and sustainable use of biological diversity, promotion and support of initiatives for hot spot areas and other areas essential for biodiversity conservation, and the promotion of the development of national and regional ecological networks and corridors should be strengthened.
11. Tourism activities and development should respect the ecological characteristics and capacity of the local environment in which they take place and should be restricted or prohibited in ecologically sensitive areas.

#### **Local level:**

12. A strong support is required to include local goods and services into offers provided to tourists.

13. Revenues created by functioning financial mechanisms (e.g. entrance fees) should be reinvested for the development of sustainable tourism at the same local level.

**Local and national level:**

14. For the involvement of all stakeholders (especially business, NGOs and public sectors), it is essential (a) to establish partnerships through e.g. round tables, agreements, steering/co-ordination committees, with a special focus on transboundary co-operation, and (b) to integrate local knowledge, heritage and values in all development initiatives;
15. For raising public awareness at national and local levels, it is necessary to support public awareness campaigns and to establish information centres.
16. Education, especially on ecotourism and conservation of biodiversity, should be strengthened at local and national levels.
17. National guidelines (principles, standards, etc.) and financial support should be provided to develop and maintain ecologically sound infrastructure (i.e. trails, waste management, waste water treatment, housing, etc.).
18. Socio-economic incentives should be provided to support sustainable tourism investments and activities.
19. National and local codes of ethics (based on the Global Code of Ethics on Tourism) should be developed.
20. Sustainable principles should be incorporated into planning and the design of transportation systems, and encourage tour operators and the travelling public to make soft mobility choices;
21. To further educate tourists and influence their behaviour at destinations, collaboration among outbound tour operators, incoming operators, other service providers and NGOs should be promoted at the destinations;

**National level:**

22. Certification systems, labelling and contests should be developed in order to support good practices in sustainable tourism at local level.
23. For an efficient management of sustainable tourism and for securing the maintenance of biodiversity a legal framework should be developed and strengthened.
24. A database of financial resources for sustainable tourism should exist at the national level and should be accessible to public.
25. Special financial schemes should be established by governmental authorities to support sustainable tourism.

**International level:**

26. Ways and means, within international regulations, should be found to support local production of goods and services, such as agricultural products, to conserve the traditional ways of land use and improve economic situation of local communities.
27. The CBD Tourism Guidelines should be generally adopted at the international level.
28. Lobbying for special funds to be used for the implementation of the sustainable tourism concept should take place at the international level. (BfN 2003)

## 8.8 Central and Eastern European Greenways program (CEG)

Central and Eastern European Greenways program (CEG) is a regional program under the umbrella of the Environmental Partnership for Sustainable Development (EPSD) – a consortium of six environmental foundations in Czech Republic, Poland, Slovakia, Hungary, Bulgaria and Romania. Within the larger and regional context, the CEG program is a framework for interlinking local civic initiatives aimed at conserving natural and cultural heritage and fostering sustainable tourism development in the region.

Greenways are multifunctional trails for non-motorized users typically leading along linear green corridors, historic trade routes, rivers and railways. They are managed by local people in order to encourage sustainable development and healthy lifestyle. Greenways provide a framework for community-based initiatives and projects related to nature conservation, cultural heritage preservation, sustainable tourism and mobility. Greenways seek to address needs of locals and visitors and to provide a positive contribution to the local economy.

All Central European Greenways are implemented according to the following principles:

1. Supporting and mobilizing local communities – encouraging local enterprise, creating jobs and additional revenue streams, restoring and protecting traditional vocations;
2. Natural and cultural heritage conservation and landscape protection;
3. Using local resources – accommodation and food, tourist services, guides and local products;
4. Cooperation between countries, regions, towns, villages and their inhabitants;
5. Helping local communities discover and strengthen their cultural and social identity, improving conditions and quality of life;
6. Providing information and opportunities for tourists to help them better understand the region, its challenges and local initiatives, activities, organizations;
7. Promoting non-motorized transport and environmentally-friendly tourism, recreation and sport;
8. Creating opportunities in urban areas for use of more sustainable forms of transport to help people move about on foot, by bicycle or by public transport instead of using their own car;
9. Encouraging people to be mobile, to improve their health and safety when travelling and to undertake active and responsible forms of recreation.



## Long distance greenways



## Local greenways



## Green Bicycle – East Carpathian Greenway (Poland, Slovakia, Ukraine)

The Green Bicycle – East Carpathian Greenway aims to build an international network of bicycle and other non-motorized trails focussed on the East Carpathians Biosphere Reserve (Polish part embraces the Bieszczady mountains range). The motivation is to provide local people and visitors with access to natural and cultural heritage areas. By engaging with local communities, the Green Bicycle has become much more than just a bicycle trail. It is a source of inspiration for action to protect heritage for those concerned about threats to the outstanding natural and cultural attractions of the area. The greenway has generated new community-based initiatives – recognized with the “Green Bicycle” logo – centred on handicraft workshops and galleries, local heritage products, school projects, eco-museums and other initiatives.

The Green Bicycle initiative started in Polish part of the East Carpathians in 2001 as a non-governmental initiative aimed at increasing local community involvement in economic development and protection of the outstanding natural and heritage values of the region. The project soon built up a constituency of support, who joined together to form a Local Partnership called the “Green Bieszczady”. The Partnership was created as a coalition of 32 NGOs, 10 local governments, 20 schools, 28 small and medium enterprises, the Bieszczady National Park authorities and the Polish Environmental Partnership Foundation. The leader of the greenway is Bieszczady Environmental Partnership Foundation located in Lesko, with professional help of the Bieszczady Cyclists’ Society. Although the initiative started in Poland, the Green Bicycle has been extended to the Slovak side (2004). At the moment the efforts are focused on working with Ukrainian side and building the Ukrainian part of the greenway.

The 900 km long Greenway is signposted with basic direction signs and signposts with the Green Bicycle logo. Main theme of the Greenway is the atmosphere of the remote “Carpathian borderlands”. The initiators of the project try to use distinctive character of this isolated area of Eastern Europe, that throughout the centuries, served as a melting-pot for different tribes, ethnic groups and nations. The East Carpathians bring together outstanding natural values and the colourful ethnic, historical and cultural heritage of the three countries: Poland, Slovakia and Ukraine. The core area of the UNESCO biosphere reserve (the first trilateral reserve in the world) protects old-growth forest and some of the least disturbed natural habitats in Europe, which are home to large carnivores.

Along with a greenway local coalition develops a program for promoting and distributing local products with the brand “Made in Bieszczady”. Another initiative coherent with the Greenway is the program for Schools called “Schools on Green Bicycle” developed in over 20 schools, promoting environmental attitude of children and young people in the region. In 2006 the leading NGO opened a social company called “The Carpathian Centre for Active Tourism – Green Bicycle” that runs and offers several ecotourist products along the greenway and gives certification to tourist services in the region using the “Green Bicycle” brand. The income generated by the company is going to be invested in local heritage initiatives and maintenance of the signposting of the greenway. See: [www.zielonyrower.pl](http://www.zielonyrower.pl).

## 8.9 List of Protected Areas in Carpathians (Carpathian Parks, 2013)

<p><b>Czech republic</b>            SPRAVA CHKO BESKYDY            SPRAVA CHKO BILE KARPATY            SPRAVA CHKO PALAVA</p>	<p><b>Hungary</b>            AGGTELEKI NATIONAL PARK            BUKKI NATIONAL PARK DIRECTORATE            DUNA IPOLY NATIONAL PARK            GODOLLOI-DOMBVIDEK PROTECTED LANDSCAPE AREA            HEVESI FUVES PUSZTAK PROTECTED LANDSCAPE            HOLLOKOI PROTECTED LANDSCAPE            KARANCS-MEDVES PROTECTED LANDSCAPE AREA            KELET CSERHAT PROTECTED LANDSCAPE AREA            KESZNYETENI PROTECTED LANDSCAPE AREA            LAZBERCI PROTECTED LANDSCAPE AREA            MATRAI PROTECTED LANDSCAPE AREA            TARNAVIDEK PROTECTED LANDSCAPE AREA            TOKAJ BODROGZUG PROTECTED LANDSCAPE AREA            ZEMPLENI PROTECTED LANDSCAPE AREA</p>	<p><b>Poland</b>            BABIOGORSKI NATIONAL PARK            BIESKIDU MALEGOO LANDSCAPE PARK            BIESKIDU SLASKIEGO LANDSCAPE PARK            BIESKIDU ZIWIECKI LANDSCAPE PARK            BIESZCZADZKI NATIONAL PARK            BRZANKI PASMA LANDSCAPE PARK            CIEZKOWICKO - ROZNOWSKI LANDSCAPE PARK            CISNIANSKO - WETLINSKI LANDSCAPE PARK            CZAMORZECKO - STRYZOWSKI LANDSCAPE PARK            DOLINY SANU LANDSCAPE PARK            GOR SLONNYCH LANDSCAPE PARK            GORCZANSKI NATIONAL PARK            JASLISKI LANDSCAPE PARK            MAGURA NATIONAL PARK            PIENINSKY PARK NARODOWY            POGORZA PRZEMYSKIEGO LANDSCAPE PARK            POPRADZKI LANDSCAPE PARK            TATRZANSKI NATIONAL PARK            WISNICKO - LIPNICKI LANDSCAPE PARK</p>	
<p><b>Romania</b>            APUSENI NATURE PARK            BUCEGI NATURAL PARK            BUILA VANTURARITA NATIONAL PARK            CALIMANI NATIONAL PARK            CEHLAU NATIONAL PARK            CHEILE BICAZULUI-HASMAS NATIONAL PARK            CHEILE NEREI-BEUSNITA NATIONAL PARK            COZIA NATIONAL PARK            DEFILEUL JIULUI NATIONAL PARK            DINOSAURUS GEOPARK            HATEG            DOMOGLED VALEA CERNEI NATIONAL PARK            GRADISTEA MUNCELULUI-CIOCLOVINA NATURAL PARK            MARAMURES MOUNTAINS NATURAL PARK            MEHENDETI PLATEAU</p>	<p><b>Serbia</b>            DJERDAP NATIONAL PARK</p>	<p><b>Slovakia</b>            BIELE KARPATY PROTECTED LANDSCAPE AREA            CEROVA VRCHOVINA PROTECTED LANDSCAPE AREA            HORNA ORAVA PROTECTED LANDSCAPE AREA            KYSUCE PROTECTED LANDSCAPE AREA            MALA FATRA NATIONAL PARK            MALE KARPATY PROTECTED LANDSCAPE AREA            MURANSKA PLANINA NATIONAL PARK            NIZKE TATRY NATIONAL PARK            PIENINSKY NATIONAL PARK</p>	<p><b>Ukraine</b>            CARPATHIAN BIOSPHERE RESERVE            CARPATHIAN NATIONAL NATURE PARK            CHEREMOSHISKYI REGIONAL LANDSCAPE PARK            CHERNIVETSKYI REGIONAL LANDSCAPE PARK            DNISTROVSKYI REGIONAL LANDSCAPE PARK            GALYTSKYI NATIONAL NATURE PARK            GORGANY NATURE RESERVE            HUTSULSCHYNA NATIONAL NATURE PARK            NADSIANSKYI REGIONAL LANDSCAPE PARK            POLYANYTSKYI REGIONAL LANDSCAPE PARK            ROZTOCHCHIA NATURE</p>

<p>NATURAL PARK  PIATRA CRAIULUI NATIONAL PARK  PORTILE DE FIER NATURAL PARK  PUTNA VRANCEA NATURAL PARK  RETEZAT NATIONAL PARK  RODNEI MOUNTAINS NATIONAL PARK  SEMENIC - CHEILE CARASULUI NATIONAL PARK  VANATORI NEAMT NATURAL PARK</p>		<p>POLANA PROTECTED LANDSCAPE AREA  POLONINY NATIONAL PARK  PONITRIE PROTECTED LANDSCAPE AREA  SLOVENSKY KRAS NATIONAL PARK  SLOVENSKY RAJ NATIONAL PARK  STIAVNICKE VRCHY PROTECTED LANDSCAPE AREA  STRAZOVSKIE VRCHY PROTECTED LANDSCAPE AREA  TATRA NATIONAL PARK  VELKA FATRA NATIONAL PARK  VIHORLAT PROTECTED LANDSCAPE AREA  VYCHODNE KARPATY PROTECTED LANDSCAPE AREA</p>	<p>RESERVE  SKOLIVSKI BESKYDY NATIONAL NATURE PARK  SYNEVYR NATIONAL NATURE PARK  UZHANSKY NATIONAL NATURE PARK  VERHNIODNISTROVSKYI REGIONAL LANDSCAPE PARK  VYZHNYTSKYI NATIONAL NATURE PARK  YAVORIVSKYI NATIONAL NATURE PARK  ZACHAROVANYI KRAI REGIONAL LANDSCAPE PARK  ZNESINNIYA REGIONAL LANDSCAPE PARK</p>
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## 8.10 International award schemes and initiatives

There are various award schemes that support sustainable approaches and provide acknowledgement, status and publicity for the winners. So far, these schemes and awards were not used by the Carpathian countries.

### ▪ **WTTC Tourism for Tomorrow Awards**

The Tourism for Tomorrow Awards recognize the world's leading examples of organizations and destinations that adopt these principles and translate them into real practice. Entries ranged from small- and medium-sized businesses to large global players from more than 40 countries worldwide. The four major categories are:

- Community Benefit Award
- Global Tourism Business Award
- Destination Stewardship Award
- Conservation Award

### ▪ **GreenGlobe21**

Green Globes' environmental reports demonstrate responsible behavior across the triple bottom line of economic, social and environmental management. Partnering with Green Globe will help businesses to increase and sustain profits whilst meeting Corporate Social Responsibility obligations.

### ▪ **Skål International Ecotourism Awards**

The Skål network collects individuals of travel and tourism, who are in senior position, therefore they have a influential role on what their company or organization is doing, which direction it goes to. The award application is based on:

- Contribution to the conservation of nature, environmental considerations
- Cultural heritage conservation
- Community involvement and benefits
- Educational features
- Results already achieved
- Business viability
- Innovation

Applicants can be:

- Tour Operators – Travel Agents
- Accommodation providers of any size and category
- Transportation
- General Countryside (Alpine Tourism, Underwater Projects, Beaches, Theme Parks, Scenic Mountains, Rivers, Lakes)

- Cities – Villages (Community and Government Projects)
- Educational Programmes – Media
- Global Corporate Establishments

- **TourBench - DestiNet**

This is an European monitoring and benchmarking initiative for reducing environmental pollution and reducing costs in tourism accommodation establishments. Hotels, camping sites and other accommodation establishments should identify their financial and environmental achievements as well as their potential for improvement. This requires a regular and systematic collection and monitoring of the amount, type and cost of energy, water and cleaning product consumption. The 'TourBench' System is available on the internet for free in several languages. The website has both a public and a private area.

- **SUTOUR (EELM)**

The acronym SUTOUR derives from „Supporting Tourism Enterprises for Eco-Labeling and Environmental Management“ meaning that tourism enterprises are supported in the introduction and continuous improvement of an environmentally-oriented management system. SUTOUR is being carried out by the Institute of Energy Economics and the Rational Use of Energy, University of Stuttgart, in collaboration with 16 partners from five countries.

- **Blue Flag for Lakes**

The Blue Flag Programme is a voluntary certification scheme for beaches and marinas, owned and run by the independent non-profit organisation, the Foundation for Environmental Education (FEE) formerly As of 2006 FEE has member organisations in 44 countries. The Blue Flag is a widely recognised eco-label for the public, decision-makers and tour operators. In 2006, more than 3100 beaches and marinas in 36 countries were awarded with the Blue Flag.

Recently some attempts have been made to apply the Blue Flag criteria to lakes, which would particularly be interesting for the lake destinations in the Carpathians.

- **BEST**

BEST was started in 1999 with a grant from the Ford Foundation and served as an incubator for a variety of activities aimed at encouraging the adoption of sustainable practices, stimulating the demand for such practices by travellers, and helping communities start pilot programs. In late 2003, BEST became a part of the Prince of Wales International Business Leaders Forum (IBLF) as a programme of the International Tourism Partnership, and continues to be a resource for everyone interested in the vital task of encouraging sustainable travel practices by the travel & tourism industry, communities, educators and individual travellers.

- **Center for Sustainable Destinations (National Geographic)**

National Geographic has started a new initiative called geotourism, i.e. it is defined as tourism that sustains or enhances the geographical character of a place – its environment, culture, aesthetics, heritage, and the well-being of its residents (The Geotourism Charter). Of the Carpathian so far only Romania signed the Charter. The Center provides suggestions for institutions, destinations and travellers, as well.

- **Touring Nature (Routes Assembly of European Regions)**

The 'Touring Nature' project aims at developing sustainable tourism in rural areas throughout Western, Central and Eastern Europe. It is driven by two main concerns:

- Environmental protection and the promotion of sustainable strategies
- Involvement of regional authorities and stakeholders; and interregional cooperation.

These core orientations are grounded on the observed trend of growing environmental expectations by European citizens and tourists and their eagerness to engage in holidays alternative to mass and seasonal tourism. The 'Touring Nature' project consists in setting up a network of rural areas throughout Europe, and promoting them to the European – and even International- potential visitors ([www.touringnature.com](http://www.touringnature.com)).

## 8.11 Dark Sky Parks

“An International Dark Sky Park is a location of exceptional nighttime beauty, dark skies education, and preservation of the nighttime environment. Each park shown below has gone above and beyond the requirements as stated in our International Dark Sky Park Guidelines.” (<http://www.darksky.org/night-sky-conservation/dark-sky-parks>)

### Certified International Dark Sky Parks

Name	Location	Year Established	Tier
Natural Bridges National Monument	Utah, USA	2006	Gold
Cherry Springs State Park	Pennsylvania, USA	2008	Gold
Galloway Forest Park	Scotland, UK	2009	Gold
Zselic National Landscape Protection Area	Hungary	2009	Silver
Goldendale Observatory Park	Washington, USA	2010	Silver
Clayton Lake State Park	New Mexico, USA	2010	Gold
Hortobagy National Park	Hungary	2011	Silver
Observatory Park	Ohio, USA	2011	Silver
The Headlands	Michigan, USA	2011	Silver
Big Bend National Park	Texas, USA	2012	Gold
Death Valley National Park	California, USA	2013	Gold
Chaco Culture National Historical Park	New Mexico, USA	2013	TBA

### Certified International Dark Sky Communities

Location	Year Established
Flagstaff, Arizona USA	2001
Borrego Springs, California USA	2009
Isle of Sark, Channel Islands, UK	2011
Homer Glenn, Illinois USA	2011

### Certified International Dark Sky Reserves

Name	Location	Year Established	Tier
Mont Mégantic	Quebec, Canada	2008	Silver
Exmoor National Park	Devon and Somerset Counties, England, United Kingdom	2011	Silver
Aoraki Mackenzie	New Zealand	2012	Gold
NamibRand Nature Reserve	Namibia	2012	Gold
Brecon Beacons National Park	Wales, UK	2013	Silver

## 8.12 Carpathian Sustainable Tourism Indicators

This set of indicators has been developed based on the Indicator System for ‘Sustainable Tourism Destinations’ of the *Tourism Sustainability Group (TSG) – DG Enterprise (Final Draft 2<sup>nd</sup> November 2009)*.

### I. Basic definitions \*:

<b>Tourist</b>	At least one overnight stay
<b>Same Day Visitor</b>	No overnight stay
<b>Visitor</b>	Tourists + Same Day Visitors

\* According to the European Community methodology on tourism statistics

([http://epp.eurostat.ec.europa.eu/portal/page/tourism/documents/IRTS\\_2008\\_UNEDITED\\_0.PDF](http://epp.eurostat.ec.europa.eu/portal/page/tourism/documents/IRTS_2008_UNEDITED_0.PDF))

### II. Definition / framework for this set of indicators

<b>Destination</b> (Target unit)	For this set of indicators a destination is a region, which markets its tourism in a common way. The indicators are meant to fit also from small(est) destinations to the Carpathian level.
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**There will be a need for destinations to use data and information from a variety of sources such as:**

- Official sources and statistics
- Business Surveys
- Visitor Surveys
- Host Community Surveys
- Plus new destination studies to be developed

### III. Destination Description and key Data

1. Name of Destination	
2. Category of Destination City, municipality, district, province, protected area (Attach delineation of territory, incl. boundaries of PAs)	
3. Location within the Carpathians	
4. Population size/Residents	
5. Area in sq. km	
6. Number of tourism enterprises in the destination	
7. Annual number of tourist arrivals	
8. Annual number of overnight stays	
9. Annual number of same day visitors	
10. Total number of enterprises (all sectors)	
11. Number of beds	
12. Direct employment in tourism	
13. Total employment (all sectors)	
14. Number of second/rental homes	

### IV. Core indicators

Number and Title	Wider Topic Area	Measures
		1. Number of tourist nights per month.
		2. Daily spending per tourist.
		3. Number of same day visitors per month.
		4. Daily spending per same day visitor.

<p style="text-align: center;"><b>No 1</b></p> <p style="text-align: center;"><b>Tourism Volume and Value</b></p>	<p style="text-align: center;">Tourist impact presence</p> <p style="text-align: center;">Same-day visitor impact presence</p>	<p>5. Relative contribution of tourism to the destinations economy i.e. tourism generated income as a percentage of total GVA (gross value added) of the destination</p>
<p style="text-align: center;"><b>No 2</b></p> <p style="text-align: center;"><b>Tourism Enterprises Performance</b></p>	<p style="text-align: center;">Productivity competitiveness of businesses</p>	<p>6. Occupancy rate in commercial accommodation per month and average for the year.</p> <p>7. Percentage of tourism enterprises participating in cooperative marketing.</p> <p>8. Average REV PAR (Revenue per available room) in destination</p>

<p style="text-align: center;"><b>No 3</b></p> <p style="text-align: center;"><b>Customer Satisfaction</b></p>	<p style="text-align: center;">Fulfilment of customer expectations</p>	<p>1. Percentage of visitors that are satisfied with overall experience.</p> <p>2. Percentage of repeat/return customers (within 5 years).</p> <p>3. Value/price rating by visitors.</p>
<p style="text-align: center;"><b>No 4</b></p> <p style="text-align: center;"><b>Community/Social Impact</b></p>	<p style="text-align: center;">Carrying capacity of the destination</p> <p style="text-align: center;">Community acceptance</p>	<p>4. Number of available beds per 100 residents.</p> <p>5. Number of tourists / visitors per 100 residents.</p> <p>6. Number of second/rental homes per 100 homes.</p> <p>7. Percentage of local residents who are satisfied with tourism in the destination (per month/season).</p> <p>8. Percentage of local residents directly or indirectly benefiting from tourism.</p> <p>9. Percentage of employees in tourism holding relevant qualification at basic, intermediate or higher level.</p> <p>10. Percentage of tourism enterprises where the employees receive any training.</p>

<b>No 5</b>  <b>Quantity and Quality of Employment</b>	Contribution of employment to resident population	1. Direct tourism employment as percentage in total employment.
		2. Percentage of jobs in tourism that is seasonal.
		3. Percentage of “non resident” employees by month.
		4. Local unemployment rate by month.
		5. Percentage of employees in tourism who indicate they are satisfied with their jobs.
		6. Ratio of average wage per employee in tourism to average wage in destination.
		7. Percentage of employees in tourism holding relevant qualification at basic, intermediate or higher level.
		8. Percentage of tourism enterprises where the employees receive any training.
<b>No 6</b>  <b>Gender Equality</b>	Gender equality	1. Average wage in tourism for women compared to men’s employment.
		2. Percentage of men and women in tourism employment.

<b>No 7</b>  <b>Equality - accessibility</b>	Inclusion for those with special needs	1. Percentage of sites considered accessible.
		2. Percentage satisfaction level of customers with disabilities.
		3. Percentage of hotels with accessible rooms.
		4. Participation in recognised accessible information schemes (0 – 100%).
		5. Percentage of visitor attractions/sites that are recognised information schemes (0 – 100%).
		6. Availability of local public transport system and vehicles that are accessible for wheelchair users (bus, tram, metro, light railway, taxi, mini bus) (Yes/No) to each modal category.
	Reducing the impact of travel	1. Average length of stay of tourists (nights).
		2. Average length of stays same day visitors (hours).
		3. Average km travel by tourists to and from

<b>No 8</b>  <b>Reducing transport impact</b>	per visit/stay	home to destination.
	Reducing the impact of travel per visit/stay	4. Average Km travel by same day visitors from and to destination.
		5. Percentage usage of different modes of transport (Public/private and type) for arriving tourists and same day-visitors.
		6. Percentage of visitors using local/soft mobility services (definition of soft).

<b>No 9</b>  <b>Climate Change</b>	Mitigation and Adaptation re climate change	1. Percentage of tourism infrastructure (hotels, others) located in “vulnerable zones” e.g. flood risk, avalanche.
		2. Presence of destination climate change adaptation strategy and plan
		3. Percentage of tourism enterprises that are involved in “adaptation” response and actions.
		4. Percentage of tourism enterprises involved in climate change mitigation schemes such as CO2 offset, low energy systems, etc.
<b>No 10</b>  <b>Sustainable tourism management practices in tourism enterprises</b>	Measuring good management practices	1. Percentage of tourism enterprises/establishments in the destination with externally verified certification/labelling for environmental / sustainability and/or CSR measures.
		2. Number of establishments with sustainability report in accordance with Global Reporting Initiative (GBI).
<b>No 11</b>  <b>Solid waste management</b>	Reducing waste	1. Percentage of tourism enterprises involved in waste reduction activities.
		2. Waste volume produced by destination (tonnes per person per year).
		3. Volume of waste recycled percentage or per person per year (preferably per month).

<b>No 12</b>	Improving quality of local	1. % Sewage discharge treated in destination.
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<b>Sewage treatment</b>	environment	
<b>No 13</b> <b>Water Management</b>	Managing water resources	2. Fresh Water consumption (in litres) per tourist night).
		3. Percentage of tourism enterprises participating in water saving actions.
		4. Percentage leakage rates in destination.
		5. Percentage of tourism enterprises using recycled water.
		6. Percentage of recycled water used in the destination.
<b>No 14</b> <b>Energy Usage</b>	Energy Management	1. Per capita consumption of energy from all sources (overall and by tourist sector – per person per day).
		2. Percentage of tourism enterprises participating in energy saving actions.
		3. Percentage of enterprises and public entities using at least 50% renewal energy.
<b>No 15</b> <b>Landscape and Biodiversity Protection</b>	Quality of landscape and biodiversity	1. Ecological potential of the destination (guidance EEA).
		2. Percentage of destination (geographical area in km <sup>2</sup> ) that is designated for protection.
		3. Existence of positive trends in land use changes and the amount of urban and agricultural/industrial sprawl and other related negative land use changes.
	Quality of local environment	4. Percentage of local enterprises committed to actions to support local biodiversity and landscape protection, conservation and management.
		5. Percentage of visitors and residents complaining about litter and other environmental pollutions in the destination.
<b>No 16</b> <b>Lights &amp; Noise management</b>	Maintaining and improving tranquillity Saving dark zones	1. Existence of local strategy and plans to reduce noise and light pollution (Y/N.)
		2. Percentage of visitors and residents complaining about noise and light pollution.
		3. Community and private business measures to reduce noise and light

		pollution (Y/N).
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<b>No17</b>  <b>Inclusive Management Practices</b>	Effective destination management and access to information for consumers	1. Presence of a destination management organisation or institutional arrangements that involving public and private stakeholders in decision making processes for tourism development and promotion.
		2. Percentage of Community satisfied with community involvement and their influence in the planning and development of tourism.
		3. Existence of sustainable tourism strategy/ action plan for the destination (with agreed monitoring and evaluation arrangement).
		4. Does your visitor information contain details about state of environment, public transport, labelled accommodation, protected areas etc.
<b>No 18</b>  <b>Development Control</b>	A strategic approach to tourism planning and development control	1. Existence of land use or development planning including evaluation of tourism impact and detailing the development and constraint issues in relation to tourism.
		2. Existence of the visitor management plan with capacity limits and analysis of current position (% of max capacity).
		3. Percentage of area subject to control land use planning and development control within the destination.
<b>No 19</b>  <b>Tourism Supply Chain</b>	Spreading the economic benefit to other local enterprise	1. Percentage of the local enterprises sources a minimum of 25% of food and drink produce and products.
		2. Percentage of local services and goods sourced locally.
		3. Percentage local tour handlers and guides used within the destination

<b>No 20</b>  <b>Protecting and enhancing local cultural identity and</b>		1. Number of cultural and heritage monuments
		2. Percentage of residents who believe that tourism is: <ul style="list-style-type: none"> <li>a) Damaging</li> <li>b) Helps maintain</li> <li>c) Helps improve</li> </ul>

<b>assets</b>		The cultural offer and assets of the destination
		3. Percentage of residents who believe that tourism is: a) Damaging b) Helps maintain c) Helps improve The heritage offer and assets of the destination
		4. Percentage of residents who believe that tourism is: a) Damaging b) Helps maintain c) Helps improve The distinctiveness and local identity of the destination
		5. Percentage of events audience that were local residents, tourists, same day visitors
		6. Percentage of residents who believe that tourism is: a) Damaging b) Helps maintain c) Helps improve The quality of life of local residents in the destination
		7. Percentage of events that are based on traditional culture and local assets

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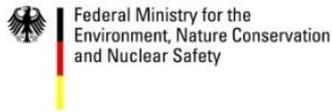
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