



Sustainable Transport and Tourism along the Danube www.transdanube.eu

STATUS QUO ANALYSIS / STATE OF THE ART EXECUTIVE SUMMARY



WP 3 / Action 3.2 and 3.3

ERDF PP2 Regional Government of Burgenland

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Jointly for our common future

Executive Summary

0. Introduction

The analysis was made in four main steps. First the status-quo of sustainable transportation and tourism was examined along with existing development plans and the legal and financial framework. The next step was a SWOT-analysis in these fields. A selection of good practices and a consolidation of the most important findings in a state of the art chapter followed as input for the development of the regional action plan.

The main tourism hotspot in PP2's project area is the national park "Neusiedler See – Seewinkel" and the surrounding region. Therefore the focus area consists of the districts of Neusiedl am See, Eisenstadt and Rust. For its connection function to the Danube, Lower Austria's district Bruck an der Leitha has been included whenever reasonable.

1. Status Quo Analysis

Regarding the demographic development an increase in population in the areas larger municipalities can be observed. Still, the population density is significantly below the national average. The regional GDP per capita (€ 24 400,- in 2009) does not reach the Austrian average.

Transportation

The main international gateway to the Neusiedler See region is the city of Vienna, with a broad choice of international connections by plane, train, bus as well as ship. A second international gateway to the region is the Slovakian capital Bratislava. Main entry point into the region with good connections to the international gateways is Neusiedl am See/Parndorf.

In the region an extensive network of regional trains and busses (especially during school days) allows to reach almost any destination in the region with public transport. The connections operated by the two railway operators Austrian Federal Railways (ÖBB) and GYSEV/Raaberbahn provide frequent trains with bicycle carriages. In addition to these railway lines several bus services are provided, partly with a lack of connections during weekends and school holidays and the disadvantage of operation times not suitable for tourists. Several municipalities offer city buses (e.g. Eisenstadt, Neusiedl am See) or micro public transportation systems (e.g. Gmoabus in Purbach or Breitenbrunn). A designated touristic bus service is the "GreMo Seebus". Introduced in 2011 this service connects main touristic hotspots in the "Seewinkel"-area during the summer months.

An extensive network of bicycle paths allows exploring the region on the bike. During the summer season (April to October) the bicycle rental system „Nextbike“ offers a simple and cheap possibility to rent a bicycle at 39 stations in the Lake Neusiedl area. Ferries across Lake Neusiedl and the Danube allow additional direct links to international cycling networks.

Lacking of a passenger port, the region between Vienna and Bratislava is not connected to the scheduled ship services on the Danube (e.g. the Twin City Liner or Hydrofoil connections between Vienna and Bratislava). Because of the same reason, the region is not included in most of the river cruise shipping tours.

Local tourism information offices provide the tourists with all necessary information about the possibilities to use sustainable means of transport in the region. Besides the local offices, the "b-mobil.info – Mobility Center Burgenland", located on the Domplatz in Eisenstadt, provides a wide spectrum of information regarding public transport and bicycling. In addition to the information office in Eisenstadt, the mobility information center

operates the website www.b-mobil.info, offering a comprehensive and up-to-date collection of information, materials and links.

Further mobility information and route planners can be found on www.oebb.at, www.anachb.at and www.vor.at. All these services are at least available in English. AnachB includes a bicycle route planner as well, another routing engine for bicyclists on www.b-mobil.info. Extensive information regarding bicycle tourism can be found on the touristic website www.burgenland.info and with a focus on centropo region on www.tourcentrope.eu.

Tourism

The main organization responsible for tourism development in the region is the Neusiedler See Tourismus GmbH. This company owned by the region's communal tourism associations promotes the region in Austria and foreign countries and offers services and information for tourists. With the brand "neusiedler see – Burgenland. The sunny side of Austria" various touristic offers in the Lake Neusiedl area are promoted. The focus of Neusiedler See tourism is on nature, culture, sports, wine&cuisine and health.

With a growth rate of more than 20% in the years 2000 to 2011, the importance of tourism as a key component for regional economic development has been increasing in Burgenland. The Neusiedler See region has a significant share of nearly 50% in overnight stays in Burgenland. 70% of the guests come from Eastern Austrian. The most important foreign market is Germany, with a share of 17% in guest's origins. 7% of guests come from other EU countries, mainly the neighboring Hungary, Slovakia and Czech Republic.

Every guest staying overnight in one of 720 partner hotels gets the "Neusiedler See Card". This card allows tourists to visit 46 touristic attractions and recreational facilities for free. The free usage of public transport (trains and buses) in the region is also included (additional charge for bicycles). There are packages including accommodation and several additional services, like guided hiking or bird watching tours. There is still a lack of packages including arrival with public transport.

Beside local tourism information offices, the Neusiedler See Tourismus GmbH has an office in Neusiedl am See. For information about the national park Neusiedler See there is an information center in Illmitz. The website www.neusiedlersee.com offers a lot of information regarding sights and activities in the region. There is also an online-tool to search for and book accommodation. The website is available in 8 languages.

Existing development plans and previous projects

The LEP ("Landesentwicklungsplan") 2011 is Burgenland's main regional development strategy and includes binding objectives and guidelines for development in the regions and municipalities. Under the vision "With the nature to new success" the strategy sets the framework for a sustainable development until 2020. In the field of tourism it defines that there should be a focus on health, nature, culture, sports and wine&cuisine. Existing offers should be further improved and new packages should be developed. One important objective is to lengthen the duration of stay of visitors in the region. Regarding mobility a main objective is to further improve the transnational accessibility especially by train. For regional transportation, sustainable and new forms of mobility (public transport, e-mobility) should be pushed.

More detailed objectives for the touristic development can be found in the Tourism strategy 2011-2015, which defines five strategic fields of action: Development of touristic offers, technology and knowledge, organizational development, perception of tourism and brand management.

Further concepts are existing for cross-border bicycle traffic (developed as part of the project GreMo Pannonia) and for railway transportation.

Beside existing development plans and strategies, previous transnational/cross-border projects created relevant outputs in the field of sustainable mobility in tourism. The project GreMo Pannonia (2008-2012) achieved results in the fields of bicycle traffic (above mentioned cross-border concept; feasibility study “Nextbike Sopron”; bilingual cross-border bicycle route planner), public transport (cross-border masterplan for Southern Burgenland; quality check of all train stations) and passenger information (mobility centers Eisenstadt and Sopron; passenger information systems; multilingual cross-border journey planner). Furthermore the achievement of running projects like MOG – Move on green (www.moveongreen.eu) and PaNaNet – Pannonian Nature Network have to be taken into account.

Organizational, legal and financing framework

With the Public Transport Association (VOR) an interregional body independent from the single transport operators acts as the key stakeholder for the coordination and further development of public transport offers. Besides the support for the development/improvement of public transport offers (taking into consideration the European, national and regional legislation) the VOR offers extensive information services for the population and visitors (www.vor.at; www.anachb.at).

In order to provide adequate financial resources, different institutions offer a variety of funding options. Depending on the focus of the project (mobility management for tourism and leisure, micro-public transport, cycling, etc.) the project initiators are supported with subsidies for the necessary investments as well as the first years of operation.

2. SWOT-analysis

Transportation

The main strength of the region is the well-developed public transport system, with frequent connections especially along the region’s main routes and to the international node Vienna. The extensive bicycle network with its good signage and service facilities is strength. Bicycle ferries and bicycle transportation on regional trains offer good services for tourists.

Problems can be identified in missing direct connection to Bratislava (change in Parndorf necessary) or missing bus services on weekends and during school holidays. Some cross-border bicycle connections have to be improved as well as the multilingualism in signage, information and maps. The missing connection of the region to river shipping services connecting the region with Vienna and Bratislava on the Danube is a weakness as well as the missing cruise ships not stopping nearby or offering trips in the region.

The general trend towards sustainable tourism and sustainable mobility is a great opportunity for Burgenland. Increasing international accessibility, the development of transnational corridors and also further development of EuroVelo 6 are positive external factors facilitating the interlinkage of Burgenland with its main incoming destinations.

Tourism

Mainly focusing on the topics nature, health, sports and wine&cuisine, the regions has clearly positioned itself clearly in the sustainable tourism segment. Good quality in accommodation and leisure facilities, attractive packages and easy-to-access information are further strengths.

Weaknesses can be found in the short duration of stay and the high seasonal fluctuation in touristic demand. The share of public transportation on the way into the region should be improved. Packages could be extended

to the neighboring regions. There are no trips or offers for tourists on cruise ships to visit the region. Only a loose cooperation between stakeholders in tourism and public transportation has been observed.

Several external factors have positive implications for the Neusiedler See region. Beside the unique landscape, fauna and flora, the terrain is perfect for cycling or horseback riding. The increasing awareness for sustainable tourism and the consumption of local/regional products fits very well with the region's touristic assets. Further positive aspects are the positive economic development in the Centrope region and the trend to short trips in the surrounding of big cities.

Beside these positive factors, a similar thematic focus in neighboring regions and the competition with cheaper offers have been identified as threads for the region. The "competition" between renewable sources of energy (especially wind power) and landscape quality for tourists has to be mentioned as well.

Development plans & results of previous projects

The government of Burgenland has developed and implemented several coherent strategies and plans for transportation and tourism. In several EU-projects regional authorities have played an active role and the positive impulses of cross-border cooperation have been recognized soon. Several innovative solutions in transportation (e.g. Nextbike system) or tourism (e.g. Neusiedler See Card) have been implemented and are continuously improved/extended.

Notwithstanding the many single activities developed and implemented to improve the transport system, an overall transport strategy is still missing. Some pilot projects had to be stopped because of organizational or financial problems. The missing cross-border cooperation perspective in the tourism strategy as well as the absence of cooperation partners in the Slovak Republic are some other threats to be mentioned.

Organizational and legal framework & funding options

The region has strong organizational structures to promote public transport and tourism. Unfortunately there is a lack of comparable organizational structures in neighboring regions, hampering cross-border cooperation. The importance of soft mobility is widely accepted among stakeholders. On the other hand there is no clear responsibility for a combined development of sustainable mobility and tourism and the cooperation between stakeholders in these fields is still weak.

A wide range of funding schemes support the development and implementation of sustainable mobility offers (not only in tourism). Due to limited financial resources on the local and regional level, the necessary public co-financing often provides a major obstacle for sustainable financing of new/improved mobility offers.

3. Factors of success (SoA-analysis)

As a result of the Status-quo, the SWOT-analysis and the identified good practices, general success factors have been identified. These factors are a valuable source of information for all further steps in Transdanube project for Burgenland and other project-partners.

Soft mobility offers and packages

To achieve an efficient organization a close cooperation between stakeholders is essential. Frequent knowledge exchange between the stakeholders in tourism and transport is a second factor for success. Local businesses should be involved in the initiatives and services.

Successful offers has to meet the demand of the tourists. Therefore a profound knowledge of target groups is crucial. Special requirements of tourists have to be respected and offers should match the identified needs of

the target groups. Synergies with other demand groups should be used in order to secure utilization of services and revenues.

All identified mobility needs should be satisfied with sustainable transport offers, not only parts of them. Operation times have to match with the demand of tourists (e.g. on weekends) and the linkage between different modes of transport has to be smooth, providing the necessary infrastructural as well as information.

Packages should include the public transportation into the region, within the region and back again. The region's thematic focus should be reflected in the offered packages and they should not stop at the border. Regularly checks of acceptance and touristic demand should enable a consequent adaption of offers.

Promotional activities of all stakeholders should be harmonized; an umbrella brand could be helpful. A common marketing strategy should be implemented. A continuous monitoring and the view of external experts help to improve packages and offers. All these offers should be accompanied by regular independent quality checks.

Transport and tourism information systems

In order to secure comprehensive, up-to-date information a strong cooperation between all relevant stakeholders has to be established – when developing the information system and during the operation phase. The organizational structures have to guarantee easy and on-time access to all relevant data and information.

Content, format and design have to be adapted to the needs of tourist. The languages to be provided should depend on the touristic catchment area (existing or intended).

The tourist should find all information for a sustainable trip in an one-stop-shop. That means information on transportation (e.g. including a journey planner) is combined with touristic information and booking possibilities. The information should contain the whole functional region, including the main international gateways to the region. The information must be up-to-date and should be easy accessible. Information should not only be available off-line (information centers, brochures etc.) and on internet platforms, but also via mobile devices.

In the field of information systems a continuous monitoring and regular knowledge exchange is essential.

Strategies and plans

While all stakeholders should be involved in the development of marketing strategies, one regional tourism association can often do a better job than numerous local organizations. A clear focus on target groups and the right mix of information channels could be further factors of success for marketing strategies.

All strategies have to be coherent in their aims and measures. The definition of clear responsibilities is a clear key for successful implementation. Once more the regular exchange of knowledge and the cooperation and involvement of stakeholders of all sectors has to be mentioned.