The Black Forest Tourist Region: 
Actual Changes of Demand, 
Supply and Organization

STADELBAUER, Jörg*

Key words: tourism, global change, climate change, Black Forest, accommodation, recreation

I Introduction

1) Position among the German tourist destinations

Germany is one of the leading nations in the international tourism industry. It holds an eminent position in a double sense. On the one hand, Germans like to travel around and are visitors all over the world, so that they add the second highest amount to the financial turnover of international tourism and, therefore, sometimes are called vice-champions in tourism. On the other hand, Germany offers many attractive destinations and hosts a large number of visitors, even if it only occupied the 8th place in regard to the number of international arrivals in 2006 with 21.5 million arrivals and the 7th place in earnings from tourism in 2005 (29.2 billion $-US). The international presence of Germans is supplemented by a significant domestic tourism, which experienced a remarkable growth in the last few years, since individual incomes are shrinking and international travelling seems to be affected by a higher risk since 11/9.

The Black Forest (Schwarzwald) is one of the most important German tourist regions and the most frequently visited one among the low range mountains (Korff, 2008). Regarding the State of Baden-Württemberg, nearly 44.6 percent of the registered overnight stays and 39.6 percent of visitors' registrations concentrate in this region, which in the delimitation of the Black Forest Tourism Ltd includes not only the Black Forest mountains themselves, but also large parts of the Upper Rhine valley. 265 communes are participating in this organization. These figures only reflect the significance of the Black Forest for tourism. Additional importance is gained by nearby recreation. The urban agglomerations of Stuttgart in the North-East, of Karlsruhe in the North-West, of Freiburg in the South-West and of Basle and Zurich — both in Switzerland — in the South direct a part of the nearby recreation demand to the Black Forest.

Nearly 80 percent of the guests staying in the Black Forest for at least one night originates from Germany, one fifth are foreigners. They mainly come from Switzerland, the Netherlands and France. To a remarkable extent, Swiss people visit the Southern Black

* University of Freiburg, Germany
Forest where they influence the real estate market of second homes. In 2006, continuing demand originating from foreign countries led to an increase of income gained from tourism in Baden-Württemberg, whereas in 2007 the inner demand increased to a higher amount. But in the last three years, the Black Forest region received little profit from this increasing demand in the German South-West. Taking under consideration the high significance of the Black Forest tourism for the regional economy, it seems worth to examine the causes, the consequences and the responding strategies.

2) Potentials

Looking at the basis of the Black Forest tourism, the main potential consists in the low range mountain landscape. It is characterized by poor soils, positively evaluated qualities of fresh air, a scenic landscape mosaic of wooded areas and open-land, low level of urbanisation, good accessibility by highways and railroads, old popular traditions and a diverse rural structure. At the fringe of the mountains and in the central and northern part mineral and thermal waters are the basis for spa tourism, namely with health resorts like Baden-Baden, Badenweiler, Wildbad, Bad Rappoldsau, Bad Peterstal, Bad Herrenalb and others. In the High Southern Black Forest centres of ski sport were established looking for international acknowledgement. Among the urban agglomerations at the fringe of the Black Forest, Freiburg considers itself as “capital of the Black Forest”. The town with 218,000 inhabitants offers 4,900 beds in hotels and guesthouses and counted 1.28 million overnights in 2008.

3) Images

It may be asked for which type of landscape the Black Forest stands in international comparison. Each stay in the Black Forest environment generates images, which are gained from the regional potential and communicated to other people and create new images themselves. Advertisement and tourist promotion work with such images, which are well known to us and are effective through recognition (Korff, 2005). In the year 2006, even the German Post underlined a certain image of the Black Forest by a special stamp. These images include the mixed forest of fir, spruce and beech, which in several cases was superseded by re-forestation of spruce during the 19th century. Only in recent decades the former composition has been reactivated for ecological reasons. Among the positive images we find the huge Black Forest farmsteads, which seem to represent a certain rural prosperity. Last but not least, the rich cuisine with several regional specialties belongs to the positive experiences of all visitors.

II Leading questions

At the first glance, the Black Forest seems to represent a consolidated tourist destination, but there are some problems that cannot be ignored. The Black Forest is urged to react to some actual challenges. Considering that middle-income social groups dominate among the visitors, at least three directions of needed adaptation can be identified:
(a) Black Forest tourism developed in a rural environment as economic annex to a less competitive mountain agriculture based on livestock farming and forestry. Due to
external influences, this type of economy experienced significant changes during the last decades. The agrarian politics of the European Union, a surplus of wood and the competition of less expensive foreign tourist destinations reduced the tourist demand. The adaptation caused a series of strategies aiming at a realistic presentation of the regional structure to the visitors. Risk scenarios like winters poor in snowfall for the future are postponed because they would create negative images counterproductive for tourism. Therefore, the concepts for actual tourism are derived from general regional development strategies for Central European low range mountain regions.

(b) The Black Forest is well known on a national and international level, but the pressure exerted by globalisation needs new, interregional marketing strategies. It seems necessary to develop a “Black Forest” brand. Such a strategy does not always correspond to the aims of individual communes and groups of communes, which aim at their own profile in competition with neighbouring communes. For example, at present, ten communes of the High Southern Black Forest sub-region try to develop their own brand “High Black Forest”\(^2\). The organisation of the Black Forest marketing must develop a product which fits to the market in the balance between regional and communal marketing efforts.

(c) On a global level, tourism strategies have to cope with phenomena of global change. The tourist region Black Forest seems to be adequate for the urban demand, but new challenges result from the second demographic transition in post-industrial societies (relative over-aging), the recent diversification of life-styles (which causes a diffuse structure of demand) and the actual climatic change (global warming, increase of winter precipitation in a phase of reduced snow security).

Therefore the following paper is concentrated on answers given by the regional tourism industry to the named challenges of socio-economic rural development, globalisation and global change.

III Methodology and data problems

The paper is based on an overview of different studies concerning the Black Forest tourism. It analyzes statistical data, follows approaches of qualitative empirical study and aims at a complex problem analysis. The main focus is less a detailed case study than a general overview referring to some problems of the Central European low range mountains. Nevertheless, the case study of Hinterzarten shall deepen the general approach.

Unfortunately, statistical data suffer from a remarkable insufficiency: The official statistics in tourism only register the number of guests and overnights of accommodations offering more than eight beds. But it is a specialty of the Black Forest tourism, that private accommodation and holiday apartments cover a high share of the supply. To a large extent, they are not included into the official statistical data records, because many hosts cannot offer more than eight beds. A rough calculation supposes that the official data have to be corrected by an
additional third up to a half if all overnight opportunities will be taken into account.

IV A short view back to the history

Black Forest tourism has a long tradition going back to Roman times, when thermal springs at the edge of the mountains were used for recreation (e.g. Baden-Baden, Badenweiler). In medieval times some more thermal springs in the Northern Black Forest were developed. This tradition experienced a first culmination in the 19th century, when high society members regularly visited the health resorts. At that time the first summer recreation resorts arose. Their significance increased with railway construction to the mountains (Korff and Mohr, 2008, p. 278). At the beginning of the 20th century winter tourism added new accentuations because of a remarkable snow security in the Black Forest. As a consequence, a bi-seasonality developed which remained dominant after World War II, in the first half of the 20th century. Two decades of nearly unbroken increase followed during the 1960’s and 1970’s. Beneath new guesthouses and hotels the additional offer “holidays at a farmstead” gained in importance, followed by holiday apartments. The decline of the tourist demand starting at the end of the 1980’s caused the closing of several guesthouses and hotels with low-standard rooms and reduced the number of guestrooms and apartments which did not meet the changing pretensions of visitors. This decline was postponed for a few years by the reunification of Germany when the Black Forest ranged high in the demand of visitors from Eastern Germany. The short increase at the beginning of the 21st century was brought about by foreign guests, but meanwhile the small rise in the number of visitors is mainly caused by domestic tourists.

Whereas accommodation was primarily concentrated in rural inns, soon supplemented by private accommodation and guesthouses, the supply meanwhile is more and more differentiated. Big hotels for the mass tourism stand side by side with exclusive four and five star hotels and exclusive restaurants operating in a high price segment. The private accommodation in well-known recreation resorts was completed by accommodation on a farmstead, furthermore holiday apartments in a rural and non-rural environment. The informal sector like holiday settlements and apartments, camping places and youth hostels thus adds to the formal sector of accommodation.

V Actual structures, tendencies and problems

1) Destinations and accommodations

The Black Forest is not a homogeneous tourist region but shows a remarkable spatial differentiation (Fig. 1):

(a) In the Northern Black Forest, health tourism in spas and exclusive gastronomy predominate, well known even beyond the boundaries of Baden-Württemberg and dependent on a well-situated inner and foreign clientele.

(b) In the Southern Black Forest health tourism concentrates in climatically favoured spas and highly certified health climate resorts, which orientate themselves to the bi-seasonality of summer recreation and winter sport.

(c) In the transitional area between Northern
Fig. 1 Tourism in the Black Forest region, 2005
and Central Black Forest, a group of mineral and thermal spas reflect a relatively adequate seasonal development of arrivals and overnights, but they highly depend on the development of the health sector (financial support of cures).

(d) In the Central Black Forest many isolated farmsteads offer “holidays on a farmstead” or at least accommodation in guestrooms or holiday apartments.

If we analyze the number of guests, the Southern Black Forest suffered from a decrease of overnights between 1995 and 2005, the Northern Black Forest from losses of the spas caused by state measures to reduce the costs in the health system. Recent changes concern the duration of stay. The trend goes from the two to four weeks long stay at one place to several short journeys during the year. In 1987 the mean duration of stay equalized 4.4 days whereas today 3 days are normal and only the older people remain for a longer period at one place. In consequence, the occupancy rate of private rooms remains low and rarely exceeds 30 percent.

One of the main problems of the Black Forest tourism exists in the low adaptation of communes and enterprises to the inter-generational change. One can argue that the relative over-ageing of the population does not need such an adaptation and that an orientation of the Black Forest to the older generation is a specific chance, but there are few attractions for younger people in the sphere of sport and event tourism. A certain boom can be observed in the field of wellness tourism which in the Black Forest adds to the existing profile.

2) Seasonality

The Black Forest started its tourist career as summer recreation area. Nearly 100 years ago, the second season was “discovered” when winter sport became more and more popular and paintings of the snow-covered landscape added new images to the perception. Since that time, efforts have been undertaken in order to extend both, the summer and the winter season. At least in the highest parts, the Black forest tourism consists on the concept of bi-seasonality comprehending hiking and recreation tourism in summertime and ski tourism in wintertime. This fundamental scheme up to now dominates the rhythm of offers. In the highest parts of the Southern Black Forest approximately one third of guests and overnights results from ski tourism in winter. The bi-seasonality exists until now although the chances for winter sport have decreased in the statistical trend of the last ten to fifteen years. Some decades earlier, there were intentions to extent the winter season until Easter, even if artificial snow-making had to substitute natural snowfall. Increasing demand for winter sport opportunities during the 1960’s and 1970’s caused the construction of many ski lifts, which should be profitable until now. The summer season has been extended until autumn (so-called golden October). Special offers and tariff reduction have attracted more visitors in those months that traditionally are weaker in demand.

3) Problems of recent development

The recent structure of tourism causes several problems for the region:

(a) The efforts of communes lying on low alti-
tude to participate in winter tourism neglect the actual climate change. Therefore, adaptation is necessary in favour of those kinds of sports that do not depend on snow and ice or must be supported by artificial snow-making. The participation of the High Black Forest in international ski events has already lost its significance during the last years. The winter 2008/2009 must be seen as exceptional in the duration of snow cover.

(b) Most of the recent offers fit to families with children or the elder generation, but to a minor part younger people and young adults. Trendy sports, event and fun tourism or infrastructure promoted by actual life-styles are not absent totally, but in most cases are disputed and cannot easily be realized by the communes. Actual problems of growth result from this fact. The project of a large bath centre co-financed by several communes and located at Titisee-Neustadt is a recent attempt to meet some of these wishes. Another path is initiated by the communes Hauern-Höchenschwand-Schluchsee, which at present analyze the potentials for a barrier free tourism to be developed for handicapped persons.

(c) Tourism is a second basis of rural farmsteads whose agriculture does not produce enough income for the survival. In this context, tourism is the mean strategy of adaptation based on measures for the development of rural regions (Mohr, 1998a, 1998b). Concepts of an ecologically orientated tourism work to the same direction. Some concepts realized in the Black Forest are initiated and subsidized by the European Union in the frame of the programme LEADER, by the Federal programme "Improvement of the agrarian structure and of coast protection" and by the State of Baden-Württemberg (measures of rural development).

VI Reactions to general trends

1) Global climate change: Adaptation to global climate change

In most of the last winter periods, the Black Forest experienced the risks of actual climate change. In the future, the winter season will probably see less snow security. Since more then ten years snow security has been reduced above all in the first winter months. Therefore the offer of ski recreation during Christmas and New Year holidays can only be maintained artificially by snow-making on slopes and pisten. The main period of natural snowfall has switched to late wintertime and early spring and has been reduced to a shorter period. The winters of 2006/07 and 2008/09, which were relatively rich in snow, could distract from this problem for a short period only.

Already more than ten to fifteen years ago it has been seen that this shortening of the winter snow security period caused ecological damages. Ski lifts are still working even if the snow depth does not reach the 15 cm minimum until the grass is damaged through the thin snow layer by the sharp edges of skies. Soil erosion and degradation of vegetation are the beginning of long lasting damages of natural ecosystems (Ries, 1996a, 1996b). Artificial snow-making is affected by new challenges caused by the rise of prices for energy. It
seems inevitable that the raising costs are passed on to the users. Until now, an active deliberation of potential consequences of climate change is insignificant. A research study carried out at the Department of Human Geography of the Freiburg University clearly demonstrates, that the sensibility of the responsible persons in the communes is still minimal (Matern, 2006).

2) Globalisation of tourism industries: Adaptation to globalisation necessities

Black Forest tourism combines the work of a lot of individual and collective actors. We mention on the one hand suppliers of accommodation and food — from the private lessors’ and farmers’ families to the entrepreneurs of big hotels, on the other hand actors in the field of management on the communal level, within the other administrative units or in unions and companies, above all the Black Forest Tourism Ltd. They all recognize that the Black Forest tourism needs support and further development, but the strategies discussed are quite different.

Independently of the adaptation to global change an internal organisational adaptation to the needs of global presence on the tourism market can be observed, e.g. on the big tourism fairs like the yearly International tourism fair in Berlin. Actually, the tourism region is developing a brand “Black Forest” which the Black Forest Tourism Ltd intends to establish internationally. It partially starts from existing stereotypes, but also tries to construct a concise pattern of imagery. Most recently, ten communes of the Southern High Black Forest founded another company aiming at promoting the brand “High Black Forest”. Thus, several attempts are working side by side or sometimes also against each other in order to strengthen the position of Black Forest tourism in the worldwide competition.

In this context, it seems interesting to have a short look on the language of advertising and promotion which accompanies the globalisation process. Stereotypes based on well-known objects serve as codes of advertising in different intensity. Examples are the red Bollenhut, the cuckoo clock and the Black Forest cherry gateau, furthermore as an element of the landscape the Black Forest farmstead. In reality, the Bollenhut is part of the rural garb in three neighbouring protestant communes (Gutach, Wolfach-Kirnbach, Hornberg-Reichenbach) of the Central Black Forest only and the red form is restricted to young girls between the ecclesiastical confirmation ceremony and the marriage. Neglecting the multitude of rural garbs, movies and advertising made the Bollenhut since at least six decades to a symbol and code for the whole Black Forest. The cuckoo clock is only one of several products of the Black Forest wood carving and precision engineering, which is based on the variety of forestry resources. This variant of the Black Forest clock is a worldwide known symbol for handicraft so that also cheap products with plastic parts from the low wage countries can be found on the markets (Stadelbauer, 2004). The Black Forest cherry gateau symbolizes the variety of the Badish cuisine as a product of handicraft and taste upgraded by the addition of high percentage cherry water (“kirsch”). Recipes are part of familiar tradition and — at the same time and in different quality — a globalized element of the
life quality in South West Germany.

Finally, the Black Forest farmstead, a mansion with large hipped roof which can be understood as safeguard for men, livestock and harvest, became a symbol of the Black Forest landscape, probably communicated by pictures of some regional painters like Hans Thoma, Karl Hartmann and Hermann Dischler (Mohr and Stadelbauer, 1992; Laule and Mohr, 2002, pp. 161f.). It is true again that there exists a large variety of forms (Schilli, 1953, Schnitzer, 1989). The presentation of this type of farmsteads in the open-air museum Vogtsbauernhof belongs to the main tourist attractions of the Central Black Forest.

3) Activities in regard of ecology and sustainability: Adaptation to the needs of rural development

There exist several attempts to safeguard the sustainability of the Black Forest rural landscape in favour of tourism:

(a) In the sphere of regional and landscape planning, there is no comprehensive planning for the Black Forest as a whole surpassing the planning on the level of the State of Baden-Württemberg, because the mountains are part of different planning regions. But the Black Forest programme of 1973 made a first attempt. It is a product of the planning euphoria of the 1970's, but the principle to maintain a minimum agricultural area which has to be preserved from being re-covered by forest is valid until today.

(b) As for the developing programmes initiated for rural areas two rural regions take profit from the regional development programme LEADER of the European Union. This programme does not finance huge projects, but small exemplary construction works which give some communes in the Northern and in the Southern Black Forest the chance to realize plans of public or private initiatives. Most of them also affect tourist goals. An example is the farmers' market at Höchenschwand.

(c) The management of two regional nature parks as large scale protected areas (Southern Black Forest since 1999, Black Forest Centre/North since 2000) lays specific stress on a combination of a regional development oriented to conservation of nature and landscape with the demand of land-use formulated by the population and the tourist land-use by visitors. Both initiatives may be classified as successful attempts. The "House of nature" (Feldberg) and the Nature Park House (Ruhstein, Black Forest highway) try to give the population an idea of conservation. Theme trails play an eminent role in the communication process. They do not only inform but they also want to give impulses for own explorations.

(d) Since the early 1990's, the idea of ecotourism has been spread in the Black Forest (Wegner et al. 1996). Apart from many details the significance of regional agrarian products and the traditional agriculture must be mentioned. The farms themselves and local restaurants try to use this potential.

(e) Another initiative may be mentioned. In order to reduce the individual traffic, a special mobility card has been introduced, the
so-called KONUS card. Nearly all communes charge a visitor's tax to the guests. For the payment of this tax, the visitor receives a card which allows the free use of nearly all busses and regional trains. This card found a broad acceptance, especially among older visitors.

As the significance of a combination of agriculture and tourism has been accepted as basis for the maintenance of mountain agriculture, all measures concerning the improvement of tourist initiatives add to the development of rural areas. Since 1970, the supply with guest beds and the networking of farmstead offering accommodation increased to such an extent, that at present nearly 300 Black Forest farmsteads cooperate in the frame of a working group covering the whole of Baden-Württemberg (Korff and Mohr, 2008, p. 281).

Niche economy seems to be a last refuge for all economic branches struggling for survival. In the Black Forest tourism seeks for such niches but tourism itself is a niche for the farms (Mohr, 1998a, 1998b). Horse-riding for visitors, Iceland pony riding for kids, marketing in favour of regional products within farmers' shops and on market places, the development of cheese-making and the cooperation of some farms on a cheese route, the presentation of regional products in restaurants are examples for a combination between agricultural and tourist activities.

4) Demographic change

The actual demographic development sees a lack of children in an aging society. Nevertheless, adaptation to the needs of young people is necessary. Trendy kinds of sport may favour the diffusion of sport tourism. I mention mountain biking, free climbing; Nordic walking etc. As nature sports may cause ecological conflicts, special management systems must be implemented using modern information technology, if visitor flow management is intended (Krämer et. al., 2004).

VII An example: case study Hinterzarten

Among the Black Forest communes, Hinterzarten is one of the best studied. There only live approximately 2,600 inhabitants3), but the commune made a name for itself in communal politics. The actual significance of tourism — according to the Baden-Württemberg statistical office in 2007 99,056 overnight visitors or 439,733 overnights with small decrease in comparison to 2006 — is mainly a product of the 20th century. At the beginning of the 1980's, the number of overnights in accommodations with more then eight beds was a little higher and counted nearly 600,000 (Laule and Mohr, 2002, Schröder, 2002a).

1) Starting point

The accessibility of the high Black Forest significantly improved after the construction of the so-called hell valley railway in 1887. It improved the connection between Freiburg as nearest central place and Hinterzarten in a way that Hinterzarten at the turn of the 19th to the 20th century developed as destination for excursions and nearby recreation and as place for retired persons, especially for retired academicians from Freiburg (Schröder, 2002b, p. 153; Laule and Mohr, 2002, p. 165). At the same time Hinterzarten gained more and more reputation as winter sport location. The paintings of
Hermann Dischler and Karl Hauptmann promoted the winter sport (Mohr and Stadelbauer, 1992). The development of restaurants and small retail trade enterprises near the railway station were further steps for the tourist centre between the two world wars. In 1960, Georg Thoma won the gold medal of the Nordic combination during the Olympic games of Squaw Valley and founded the myth of a sport commune continued for over 40 years by other sportsmen like Sven Hannawald. Thus, Hinterzarten gained more and more popularity. The construction of ski trails and significant mass events like the Black Forest ski marathon promoted the development of the winter sport place. The ski jumping-hill was re-constructed several times. Today, the Nordic ski centre of the German Ski Association continues this tradition. When the commune was certified as resort with healthy climate in 1964, the settlement structure definitively changed toward a tourist destination. The demand for second homes increased rapidly, and the construction of new houses was helpful for the local construction trade. At the turn from the 20th to the 21st centuries, the commune once again experienced a population gain by immigration.

Jobs in the tourist industry already increased between the two world wars. In 1946, only one third of the working force was occupied in agriculture, half of all in services. The tertiary sector expanded to 78% in 1987 while professional occupation in agriculture and forestry was reduced to 4.3%. Finally, Hinterzarten has definitively become a tourist commune. In 1999, it registered 2,897 beds for visitors and 580,093 overnights; the average duration of holiday stays was longer than the average of the Southern Black Forest.

2) Communal measures

The development underlines the importance of communal engagement. At the beginning, the commune had to bear the organisation of tourism. In 1949, the Tourism Association was founded which made progress with the post-war development. During the 1950's, the commune fundamentally decided to make tourism the basis of communal development. One of the most prominent decisions concerned the layout of future construction works: houses should be built in the traditional Black Forest style with hipped roof. This decision was opposed to the home-style of the architect Vetter who propagated houses with uniform inclination and colour of the roofs. Unlike the neighbouring commune of Titisee, new buildings respected the traditional style and modern materials do not dominate the appearance of the settlement. If the hipped roof is one of the Black Forest stereotypes, Hinterzarten was produced as typical Black Forest settlement. One year before the healthy climate resort certification, a new resort assembly hall was constructed, which since that time is used for different purposes. The prediction made the commune underline qualitative elements, which served as basis for the resort development plan of 1989 (Laule and Mohr, 2002, p. 177).

3) Changes in supply and demand

Up to the 1970's the supply with accommodation has been enlarged continuously. Since that time, a shift between different kinds of accommodation is obvious: The number of pri-
vately offered rooms is decreasing due to the inter-generation change of the landlords, due to insufficient modernisation and due to conversion to vacation apartments. The number of guesthouses also diminished. Today, nearly 4,300 beds are available in all kinds of accommodation. The number of second homes also increased; they are mainly used by former visitors or retired persons. The respect of tourist needs and demands is demonstrated by the actual offer of the “four beauties”: mountain-biking, family vacation, wellness, hiking and Nordic walking give the main accentuations. Winter sport is based on a net of 100 km cross-country skiing trails and another 100 km winter hiking trails.

4) The need of adaptation

We mentioned three aspects of necessary adaptation. Which are the related strategies in Hinterzarten?

(a) The change of the rural economy has made progress. Agriculture does no longer play the predominant role, tourism dominates in regard to occupation and GDP generation, but the commune abstained from the location of productive industries apart from traditional handicrafts and those industries related to tourism.

(b) Concerning the marketing strategy, Hinterzarten tries to do the splits: On the one hand advertising is related to the individual commune and its independence, on the other hand the commune co-operates with regional unions up to the Black Forest tourism Ltd. The inauguration of a new High Black Forest Tourism Association in October 2008 is a new attempt in the search for an intermediate way.

(c) The challenges of future climate change are seen, but they are evaluated less dramatically in regard of the actual marketing strategy. The commune places its hopes in bi-seasonality and aims to meet the wishes of winter sport tourists.

5) And the neighbourhood

There are significant contrasts to the neighbouring Titisee, part of the township Titisee-Neustadt, where mass tourism played an important role since the late 1930’s. During the boom after World War II, a series of modern buildings with retail and souvenir shops or restaurants was constructed along the street from the railway station to the Titisee board. In its marketing strategy, Titisee tries to attract tourist groups, including those coming from Japan.

VIII Perspectives for the future

What are the perspectives of the Black Forest as a tourist region? (Fig. 2)

Tourism meanwhile is the most important economic activity of the Black Forest region, but it can only prosper if the rural agrarian basis continues to exist. Therefore, development programmes co-financed by the State of Baden-Württemberg and the European Union are the starting point of adaptation strategies. Even future strategies have to be based on this concept. Only if the supply is pluralistic, it meets the differentiated needs, wishes and demands of the pluralistic, post-industrial society with very diverse lifestyle concepts. In this context, a second resource must be taken under consideration besides agriculture, which it comprehends. The Black Forest presents

— 52 —
itself as a very specific landscape living from the gentle dramatisation of scenic presentation. The grown-up agrarian and forest landscape needs continuous adaptation and modernisation, but must not neglect the traditions of the cultural landscape and the architectural, technological and mental heritage (Korff, 2005). The balance of the demands formulated by different lifestyle groups will cause further differentiation of supply, but these must be subordinated under the peculiarities of the Black Forest landscape and its regional diversity. Thus, the landscape of farmsteads in the Central and High Southern Black Forest must not be overloaded with unwieldy infrastructure in comparison to some early industrialised edge locations, but it asks for landscape conservation (Konold, 2008).

At present, the Black Forest feels the consequences of global developments and general trends in tourism. Clearly defined target groups or behaviour schemes do not exist any longer, but we can observe a large variety of different and rapidly changing patterns. Characteristics are reduction of the duration of individual journeys in favour of a larger number of short visits, raising claims and expectations combined with sharp perception and calculation of price and performance and — finally — short-term booking via internet, in accordance with weather situation.

The paper started with mentioning large numbers and phenomena of mass tourism. It cannot be overseen that both exist in the Black Forest. But detailed analysis demonstrated that the region meets the demands of individual tourists too: diversity of potentials, differentia-
tion of accommodation supply, different development strategies, individuality of communes even under the common roof of a powerful organisation seem to correspond to the plurality of post-industrial lifestyles, to combine internationality and regional attachment, to sell ecological adaptation for moderate prices in order to be attractive in a global market. This — probably — is a specialty of the Black Forest as tourist region.

**Notes**

3) 2007: 2651 inhabitants.

**References**


Schröder, E. J. (2002b): Hinterzartens demographischer und sozio-ökonomischer Wandel von einer Landwirtschafts- zu einer Tourismus-
STADELBAUER, J.: The Black Forest Tourist Region: Actual Changes of Demand, Supply and Organisation

165


黒い森観光地域：需要及び供給、組織の実態の変化

シュターデルバウアー・イエルク*

キーワード： 観光、地球規模の変化、気候変動、黒い森、宿泊施設、レクリエーション

黒い森地域は、ドイツにおいて最も重要な観光地の一つである。その組織化された範囲には Upper Rhine Valley（上流のライン川渓谷）を含み、Land Baden-Württemberg（バーデン・ヴュルテンブルク州）（南西ドイツ）に観光で宿泊する人のほぼ半分を受け入れ、自然の範囲の中では約４分の1（1,050万人の宿泊者）を受け入れる。潜在する魅力は、新鮮な空気、開かれた土地と森がおりなすモザイク、アクセスのよさ、古くからの伝統と豊かな農村部の構造を持つ低い山地の風景にある。ミネラルを含む温泉は、Baden-Baden（バーデンバーデン）または Badenweiler（バーデンヴァイラー）のように国際的にもよく知られた温泉の基盤となっている。

黒い森は、国内外からの客にとって定着した観光地だと考えられているが、次の3つの分野において対外的な問題に対応しなければならない。

(a) グローバル化の過程では、『黒い森』というブランドに基づいたマーケティング戦略が必要であるが、それぞれの特徴を生かしたい自治体あるいはコミュニティ協同組合の要望と対立する。
(b) 黒い森における観光は、酪農や林業を基本とする山間部農業の経済的な補完産業として発展してきたが、その重要性はだんだんと失われてきている。観光市場は地域に埋もれているものや生産品を求めている。
(c) グローバルな変化で考える場合、グローバルな変化への対応が必要であると考えられる。

工業化社会の後にある人口構成の変化、ライフスタイルの多様化、地球温暖化の深刻さに対しては、地域的な規模での回答が求められている。

黒い森における観光の歴史について簡単な調査を提示し、将来の発展に関していくつかの規制があることを指摘するために、最近の構造に関するいくつかの重要なデータを発表した。

(a) 1世紀前には、冬の観光は、夏の娯楽的観光に次ぐ2番目の季節として発展していた。しかし、近年は、雪があるという保証が減少し、人工雪を作ることが必要となり、ウィンタースポーツはその意義を失っていく可能性が高い。
(b) 観光に関するインフラは、主に子どものいる家族及び中高年世代のニーズには適しているが、おもしろさやイベントを求める若い世代の要望に対してはあまり応えていない。したがって、伸び率は下がっており、新しい戦略が必要である。
(c) 地域発展プログラムは、農業、林業及び観光産業における持続性を求めている。それらは農村社会全体における収入の重要な資源である。

重要な対策は、Schwarzwald Tourismus GmbH（黒い森観光株式会社）によるコミュニティ協同組合の再組織化、既に知られたイメージと新しいアイデアに基づいた観光商品の組み合わせ、世
世界的な気候変化に対応するマーケティング戦略にみられる。農村経済は、主に観光客の要望に焦点をあてながら、農業と観光を組み合わせたすっきり経済に向かって発展している。

これらの一般的な考察は、High Black Forest（黒い森の中心部）における主な観光自治体の一つであるHinterzarten（ヒンターツァーテン）の例を取り上げて掘り下げていく。結論として、将来的の発展に向けた影響について議論する。

* フライブルク大学