

# Accessibility of the Baltic Sea Region as a Tourism Destination

Results of a Study in the Framework of the  
EU-Project „Enjoy South Baltic!“

Karsten Heinsohn  
dwif-Consulting GmbH

Rostock, 04.05.2012



Part-financed by the European Union  
(European Regional Development Fund)



Alle Bestandteile dieses Dokuments sind urheberrechtlich geschützt.

© 2012 dwif-Consulting GmbH, München/Berlin

Dieses Dokument ist Teil der Präsentation und ohne die mündliche Erläuterung unvollständig.

# Enjoy South Baltic as part of the South Baltic Programme



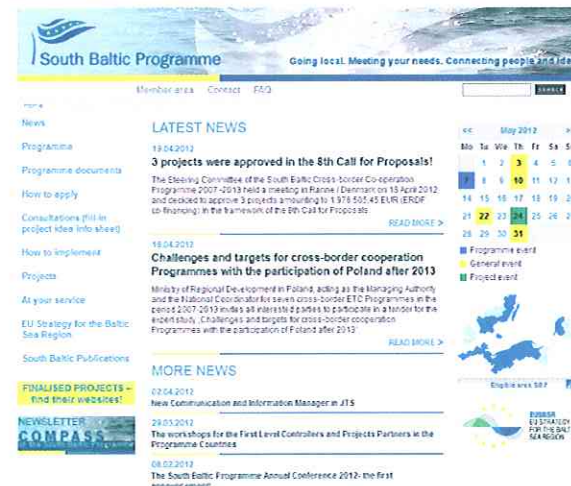
## South Baltic Cross-border Co-operation Programme 2007-2013 Going local. Meeting your needs. Connecting people and ideas

### Overall objectives

- ... strengthen the sustainable development of the South Baltic area
- ... increase its competitiveness
- ... enhance the integration among people and institutions

### Priorities

- Economic competitiveness
- Attractiveness and common identity



ENJOY  
SOUTH BALTIC



Part-financed by the European Union  
(European Regional Development Fund)

## Aim of the study

- ...analyse the **initial situation** of tourism in the South Baltic regions
- ...analyse the **strategic orientation** of the regions
- ...identify **potential and trends** in the South Baltic region

## Research methods/instruments

- » European Tourism Destination Index DESTIX
- » EURO-Benchmark
- » Quadrolingual Online Survey
- » Expert Interviews
- » Further analysis, desk research

ENJOY  
SOUTH BALTIC

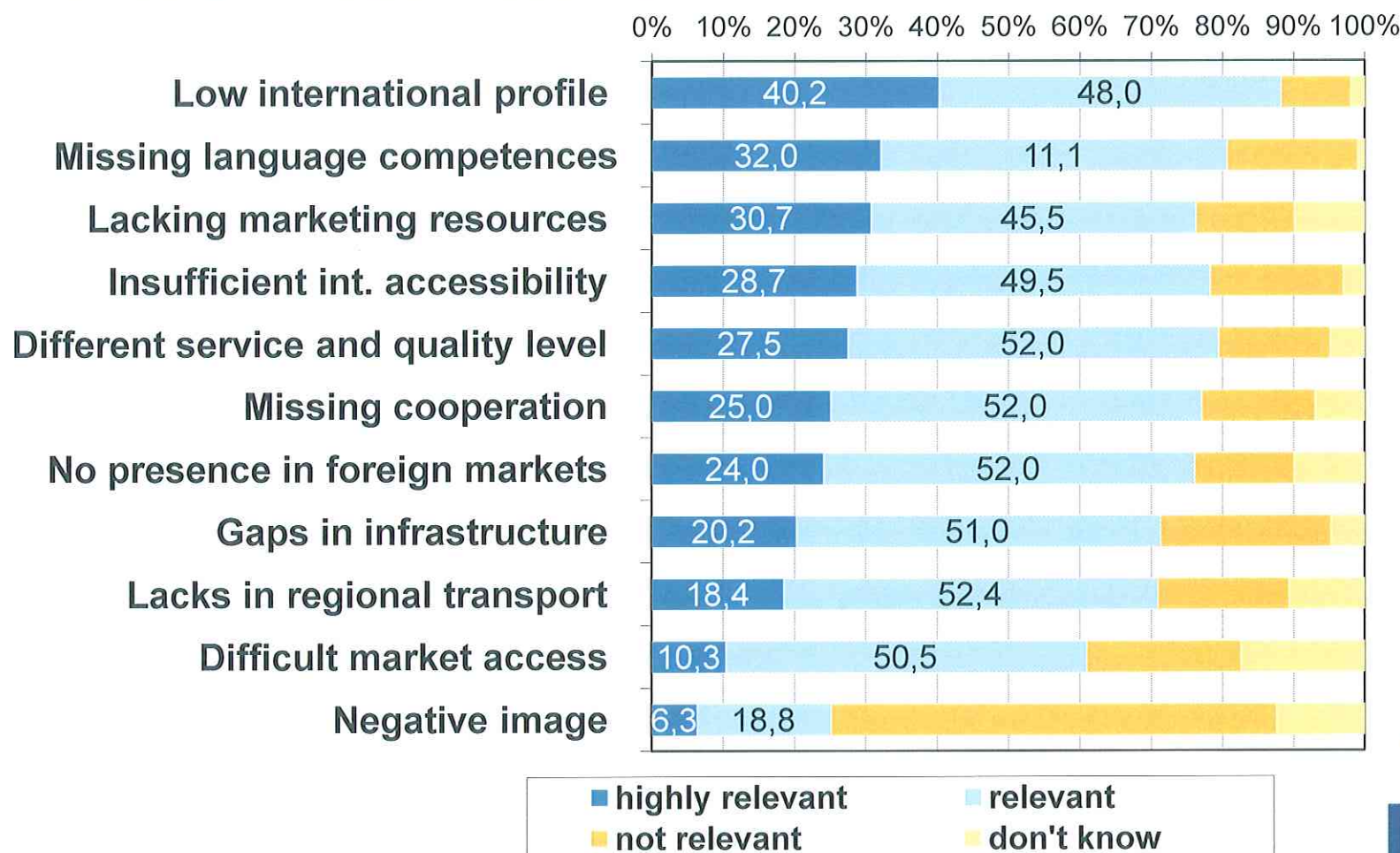


Part-financed by the European Union  
(European Regional Development Fund)



# Low international profile of Baltic Sea Area!

**“Where are the weaknesses and challenges in international tourism marketing of the Baltic Sea Area? “**



Source: dwif Online Survey 2011

**ENJOY**  
SOUTH BALTIC



Part-financed by the European Union  
(European Regional Development Fund)

**“Which tourism trends will have strong implication for the international marketing of your company / your destination within the next five years?”**



**ENJOY**  
SOUTH BALTIC



Part-financed by the European Union  
(European Regional Development Fund)

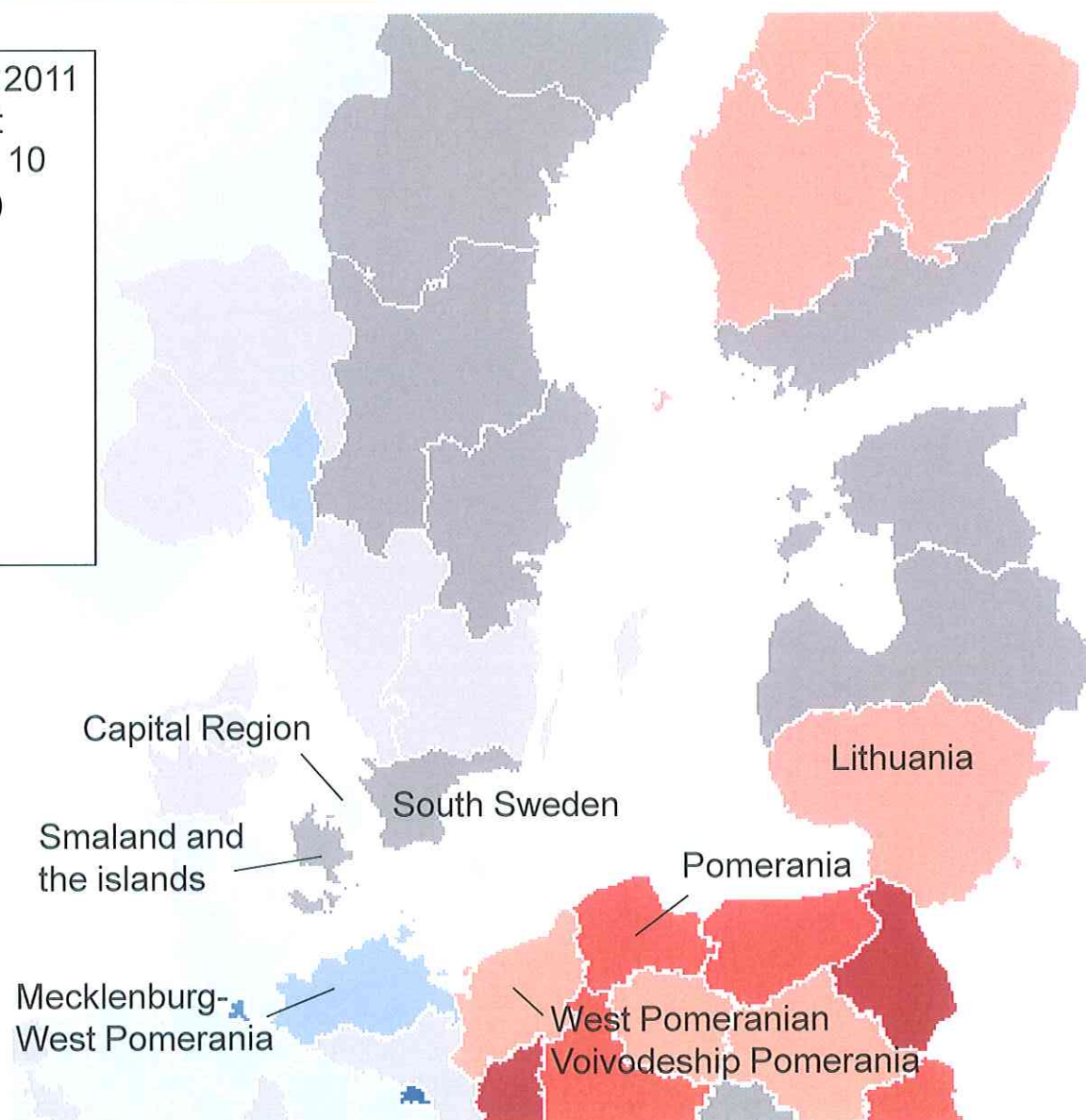
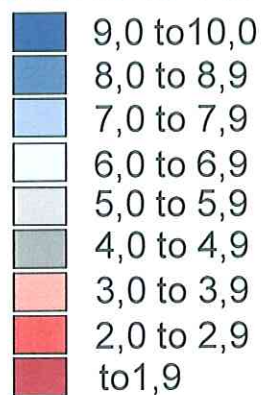
Source: dwif Online Survey 2011



# DESTIX for ESB!-Regions: Heterogenous Picture

## DESTIX (Regions) 2011

Overall Result  
Index Value 1 to 10



Source: dwif 2011

**ENJOY**  
SOUTH BALTIC



Part-financed by the European Union  
(European Regional Development Fund)

# Major Conclusions of DESTIX-Analysis and EURO-Benchmarking

- Low occupancy rates and decrease of bed places in many ESB!-regions
- Unequal tourism structures and development tendencies among ESB!-regions
- Recovery from severe realised losses expected
- Growth currently driven by Mecklenburg-Vorpommern and partly Polish regions
- Qualitative growth before quantitative growth!
- Tendency to slight overcapacities in Scandinavian regions

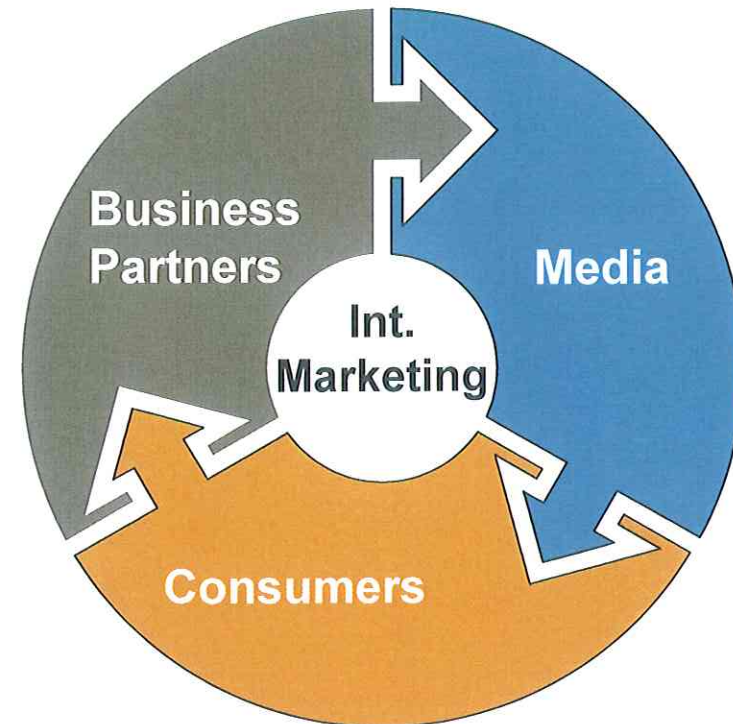


## International Marketing of ESB-regions

- Study and Sales Tours
- International Fairs and Workshops
- Press Tours
- International Press Work
- Online Marketing, multilingual websites
- Multilingual Brochures etc.
- Event Marketing

## Cooperation Activities with...

- National Tourist Boards
- Other regions or cities
- International Tour Operators
- Carriers (Ferries, Airlines), Airports
- Other tourism suppliers
- Transnational projects and networks



Source: dwif 2012, marketing concepts, expert interviews national /regional representatives

**ENJOY**  
SOUTH BALTIC



Part-financed by the European Union  
(European Regional Development Fund)

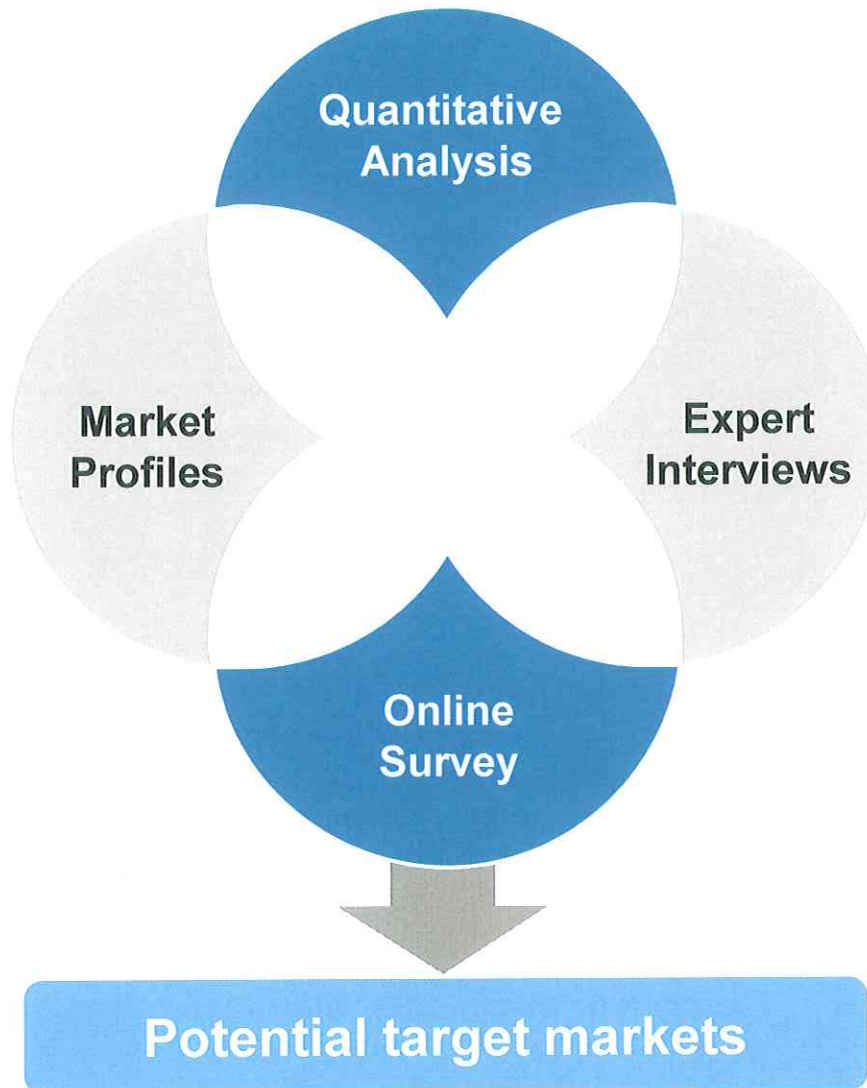


- » Fairs, events and online as most important instruments for international tourism marketing of ESB!-regions
- » International media and social media of growing importance in (crossborder) marketing
- » Currently focus on domestic markets, Germany and Scandinavia
- » Increasing importance of direct B2B-contacts to develop international source markets

ENJOY  
SOUTH BALTIC



Part-financed by the European Union  
(European Regional Development Fund)



## Quantitative Analysis

of potential source markets, based on statistical data

## Expert Interviews

with 22 professionals from tourism industry and marketing in PL, DE, LT, RUS, SE, DK and supraregional

## Online Survey

quadrolingual questionnaire addressed to more than 700 contacts

## Review of Market Profiles

as provided by National Tourist Boards

**ENJOY**  
SOUTH BALTIC



Part-financed by the European Union  
(European Regional Development Fund)

# Indicator-based Benchmark of International Source Markets includes 25 countries



Source: dwif 2012



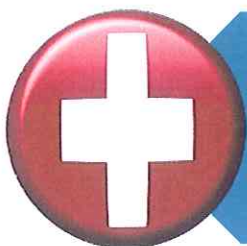
# Quantitative Analysis and Online Survey: Partly Different Rankings

		Top ranking dwif	Dynamic ranking dwif	Ranking Online Survey
<b>Germany</b>		1	19	1
<b>Denmark</b>		2	13	5
<b>United Kingdom</b>		3	9	10
<b>Norway</b>		4	3	-
<b>Switzerland</b>		5	5	3
<b>Sweden</b>		6	25	2
<b>Netherlands</b>		7	11	7
<b>France</b>		8	6	-
<b>Poland</b>		9	17	6
<b>Austria</b>		10	10	8
<b>Finland</b>		11	7	-
<b>Czech Republic</b>		12	2	-
<b>USA</b>		13	24	12
<b>Russia</b>		16	4	3
<b>Japan</b>		17	18	16
<b>China</b>		22	1	14

Comment: overview includes domestic markets of project partners

Source: dwif 2012

# Project Partners' Decision on 3 Target Markets

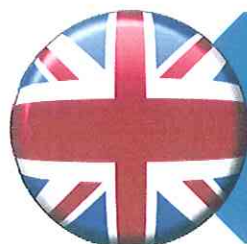


**Switzerland**

(transferable to Austria)



**Russia**



**United Kingdom**

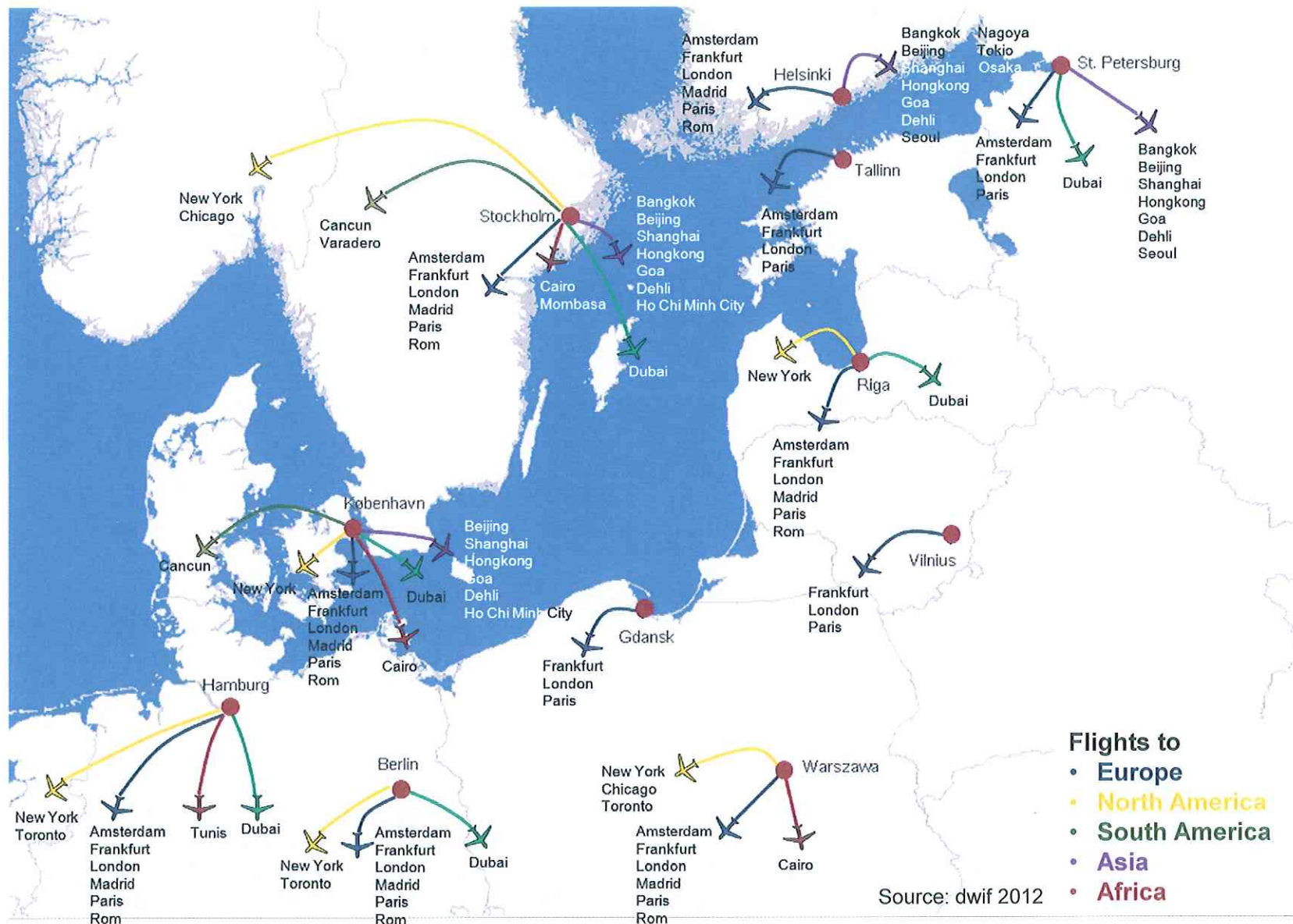
(partly transferable to Scandinavia)

**ENJOY**  
SOUTH BALTIC



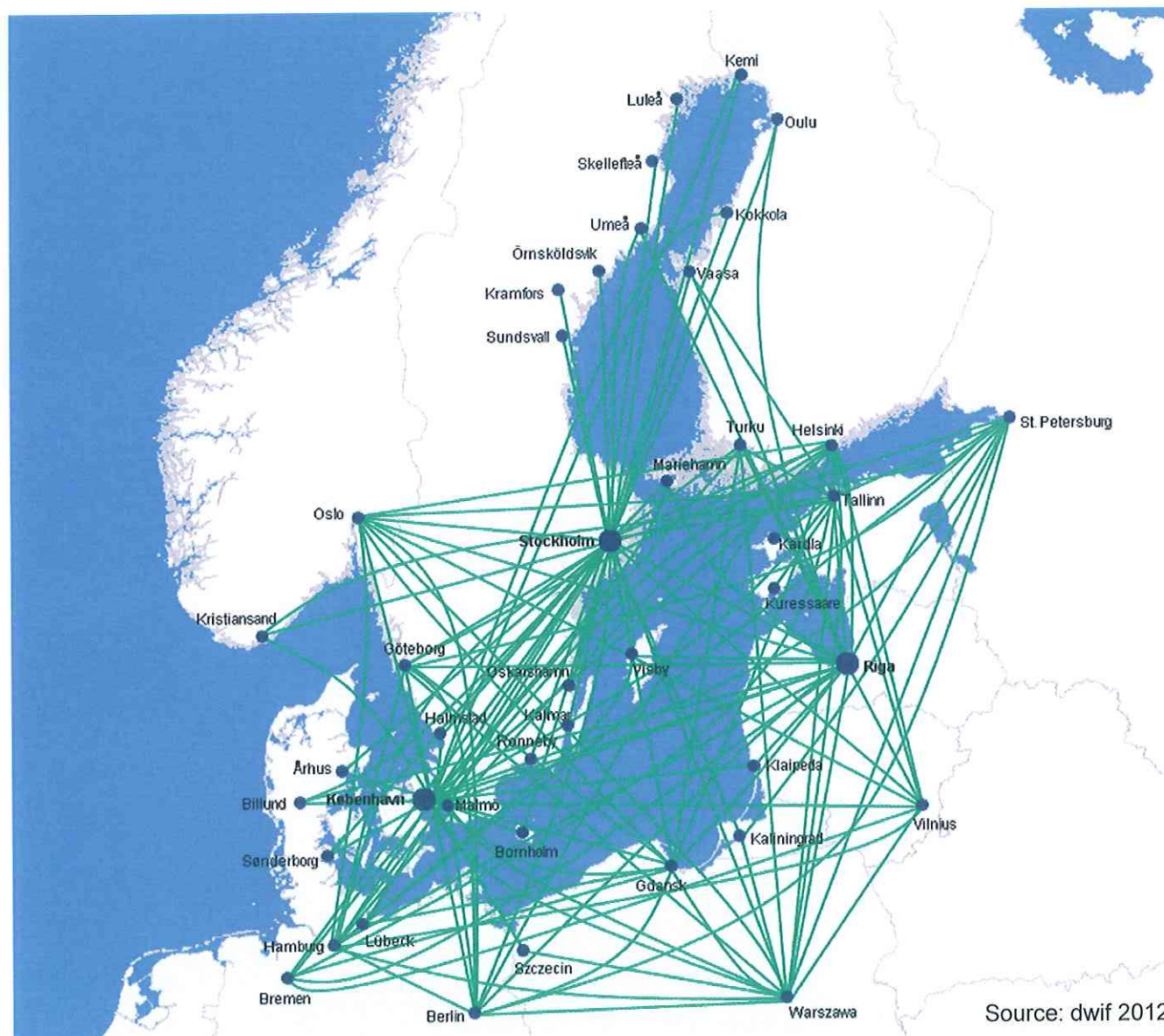
Part-financed by the European Union  
(European Regional Development Fund)

# Especially Scandinavian Airports Highly Relevant for International Accessibility of South Baltic Region





## Riga, Stockholm and Copenhagen also Important for Intra-regional Flight Connections



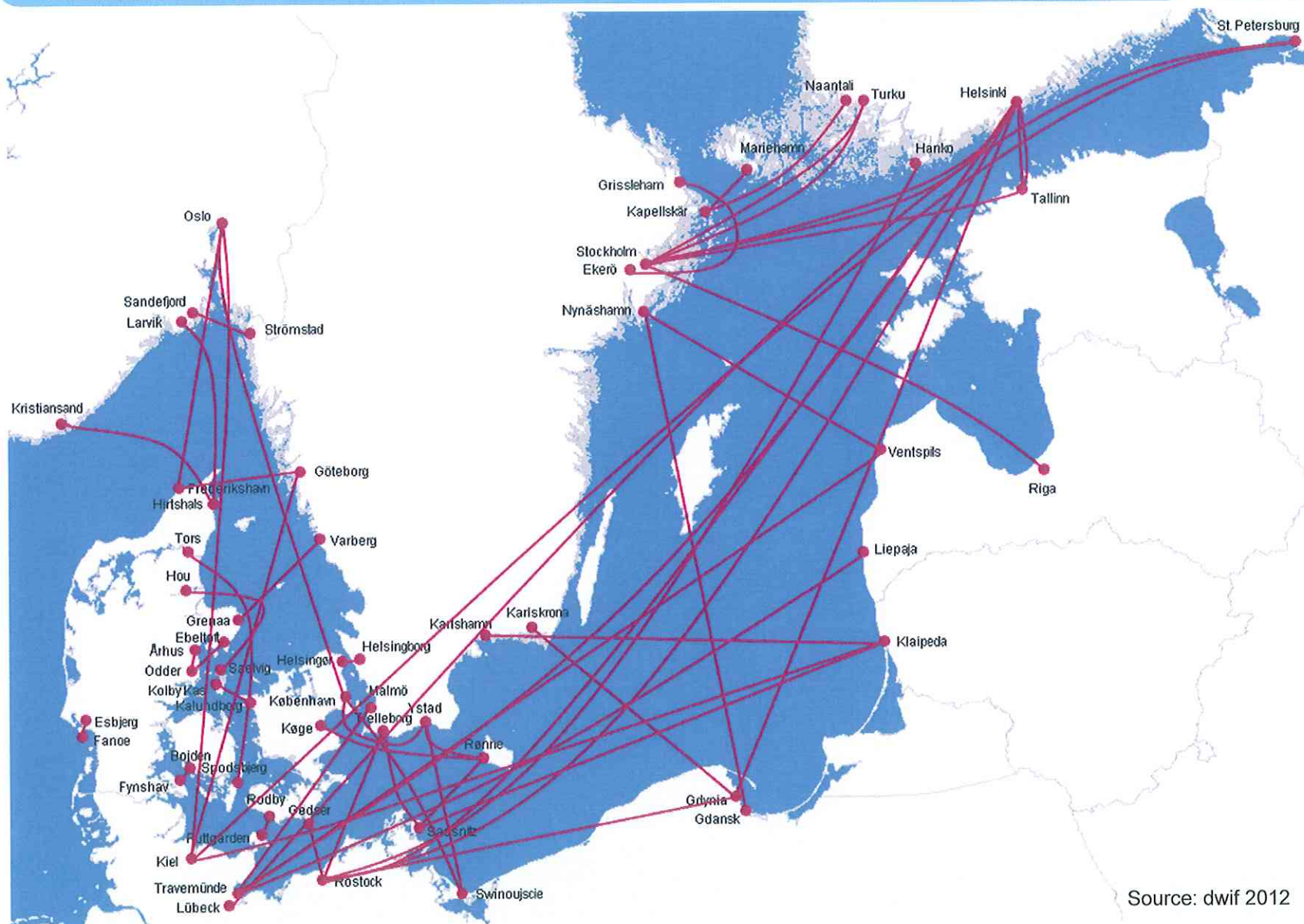
Source: dwif 2012

**ENJOY**  
SOUTH BALTIC



Part-financed by the European Union  
(European Regional Development Fund)

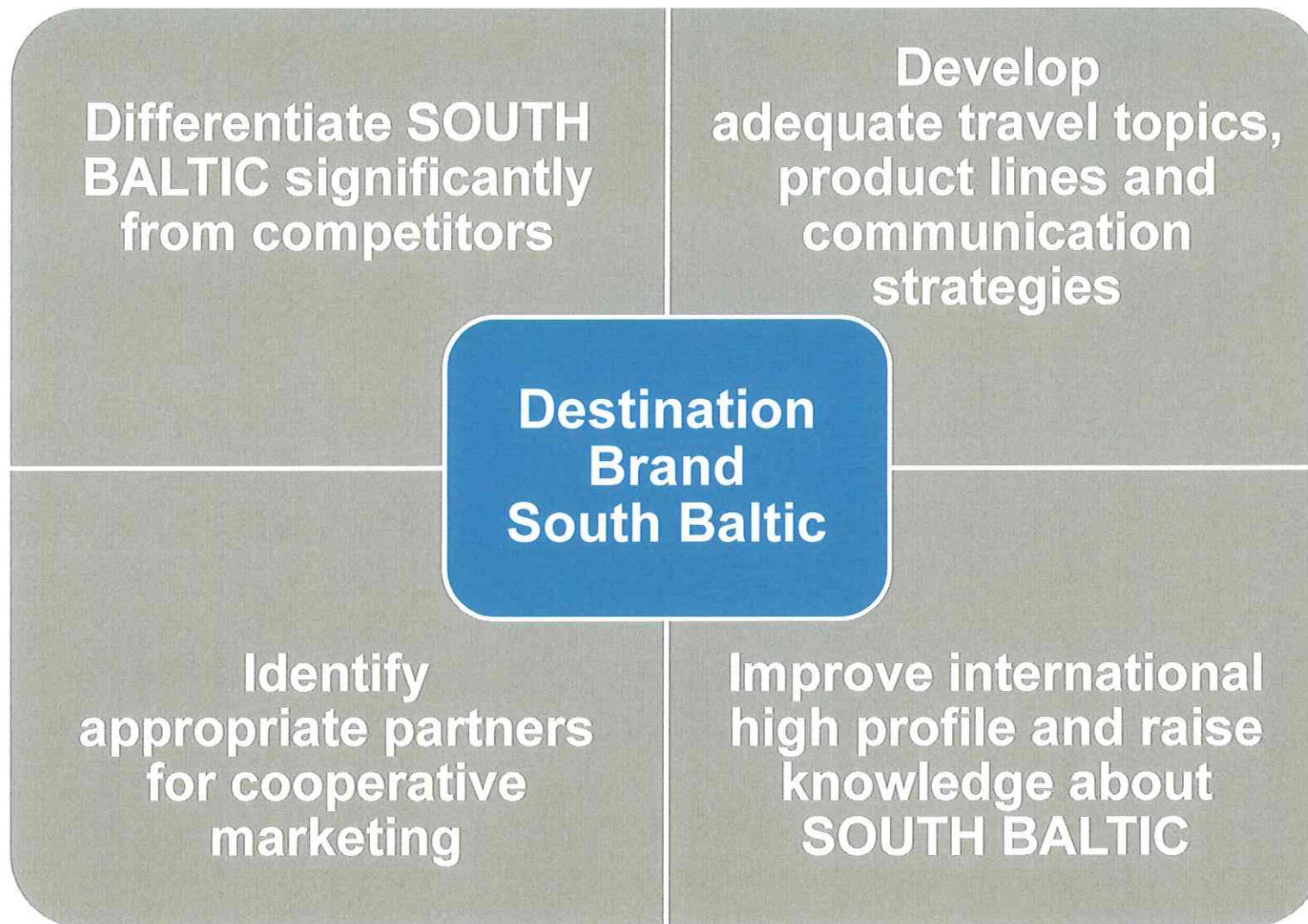
# Relevance of Scandinavian Ports for Intraregional Ferry Connections



Source: dwif 2012



# USPs and Travel Topics for the Baltic Sea Region






No USP, Image and Brand South Baltic yet!

**dwif**  
consulting



There is no joint image or brand **BALTIC** and much less a brand **SOUTH BALTIC** yet!



The **development** of the brand **BALTIC SEA** interferes with established brands like **SCANDINAVIA!**

ENJOY  
SOUTH BALTIC



Part-financed by the European Union  
(European Regional Development Fund)

Source: dwif 2012, Online Survey, Expert Interviews, Desk Research

# Culture, Nature and Maritime as USPs

## **CULTURE, mainly**

- Architecture, Design
- Cities (Copenhagen, St. Petersburg, Tallinn)

## **NATURE and MARITIME, mainly**

- Maritime Nature (coast, water, wind, beach)
- Unique Nature, National Parks
- Islands
- Sports

## **OTHERS, mainly**

- Wellness and Health
- Culinary



Source: Online Survey, dwif 2011

Pictures: Tourismusverband Mecklenburg-Vorpommern / Böttcher, Ramminger, Legrand; map: South Baltic Programme

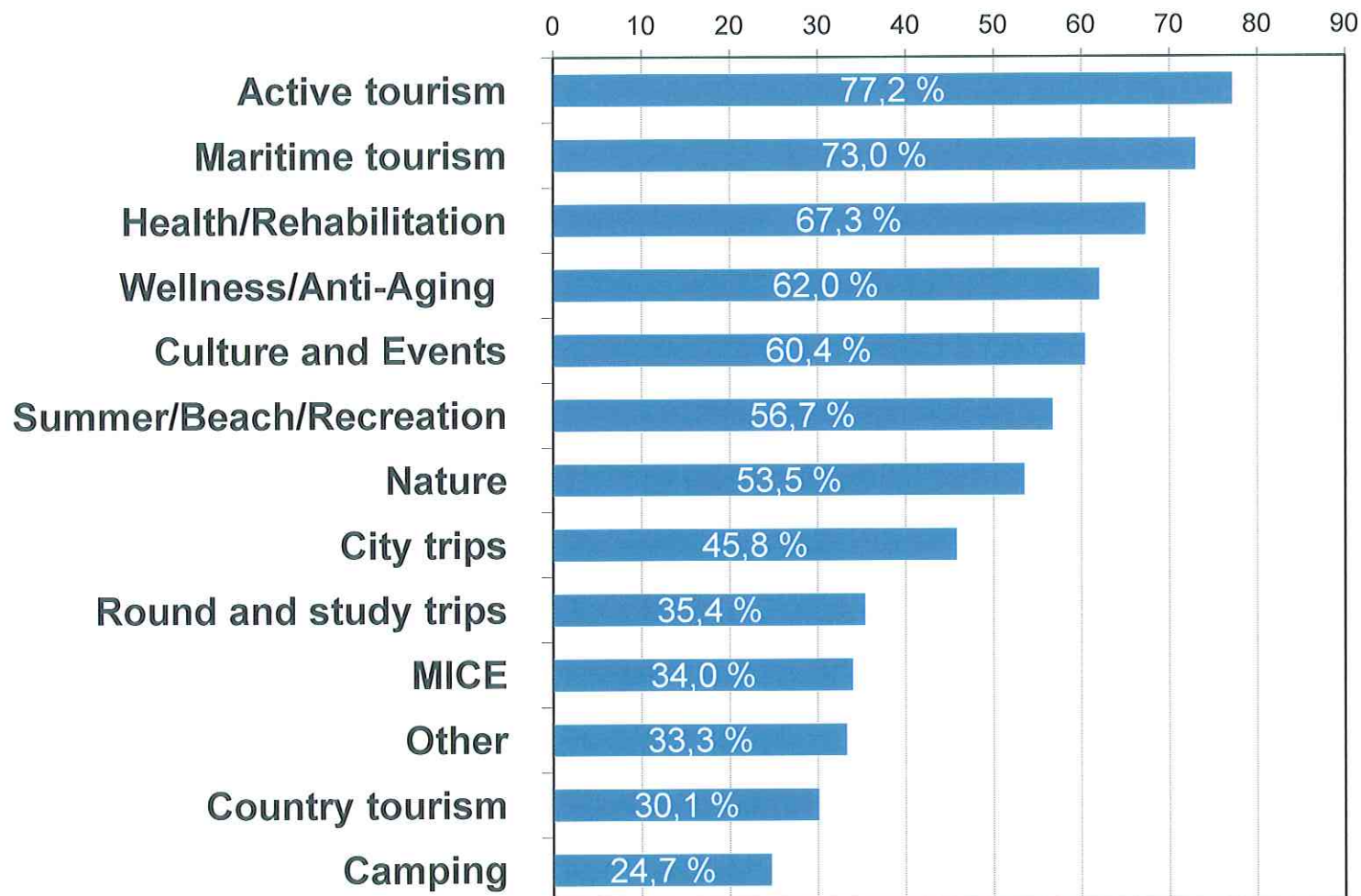
**ENJOY**  
SOUTH BALTIC



Part-financed by the European Union  
(European Regional Development Fund)

## Growth expected mainly for Active and Maritime Tourism

“Please indicate the expected future development of the following travel topics.”



Source: dwif Online Survey 2011

**ENJOY**  
SOUTH BALTIC



Part-financed by the European Union  
(European Regional Development Fund)



**CRUISE TOURISM**

**CULTURAL ROUND TRIP**

**HEALTH & SPA**

**ACTIVE TOURISM**

**ENJOY**  
SOUTH BALTIC



Part-financed by the European Union  
(European Regional Development Fund)

# Conclusions and Recommendations

- Considerable potential for **joint tourism promotion** of Baltic Sea region on international markets
- Promotion of the **entire Baltic Sea** instead of limitation to the „artificial“ area South Baltic
- Integration of **further partners** from the Baltic Sea area (gateways, tourism highlights) highly recommended
- **Good accessibility** of the Baltic Sea area as a basic requirement for tourism development
- Creation of joint themed **tourism packages**



# Landing-page Enjoy South Baltic

your search term  [Search](#) [EN](#) [EN](#) [DE](#) [RU](#)

**ENJOY**  
SOUTH BALTIC

Destination

ESB project

> [Culture](#) [Maritime](#) [Spa/Health](#) [Nature](#) [Travel facts](#)

[Must See](#) [Protected Areas](#) [Activities](#)

Special offers

Upcoming events

Part-financed by the European Union  
(European Regional Development Fund)

[f](#) [t](#) [Home](#) [Contact](#) [Imprint](#) © Enjoy South Baltic

Part-financed by the European Union  
(European Regional Development Fund)



**Thank you for your attention and  
our wishes for a great success!**

Karsten Heinsohn  
Senior Consultant

dwif-Consulting GmbH  
Marienstraße 19/20  
D-10117 Berlin  
k.heinsohn@dwif.de  
www.dwif.de

Picture: Tourismusverband Mecklenburg-Vorpommern

**ENJOY**  
SOUTH BALTIC



Part-financed by the European Union  
(European Regional Development Fund)