

Study Baltic Sea Region as Tourism Destination in the Internet

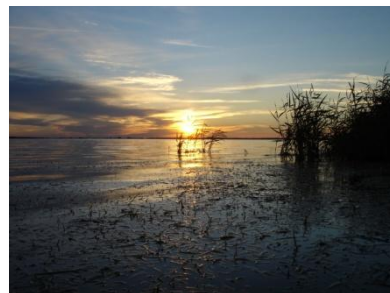
Study commissioned by the State Chancellery Mecklenburg-Vorpommern
Coordinator for Priority Area Tourism
EU-Strategy for the Baltic Sea Region

Warnemünde, May 3rd 2012



According to the TOR:

- Evaluation of only English websites
- 10 national tourism organisations
- 1-3 destinations per country (e.g. cities)
- Theme- and network specific sites
- Websites of private service providers
- Criteria such as themes, content, information provided, currentness, user friendliness and booking options, interactivity and web 2.0
- Recommendations for a common website



1

Approach

2

Findings

3

Recommendations

Evaluation criteria:

Basic criterion

- only websites which provide English language (up to 5 per country, 66 in total including additionally selected websites due to their domain name)

Themes (quantitative evaluation)

- rural tourism
- cultural and natural heritage
- cultural routes
- nature parks
- nautic tourism including marinas and landside information

Usability

- information quality
- news and currentness
- booking tools
- maps
- web 2.0
- languages

Specific/ further questions:

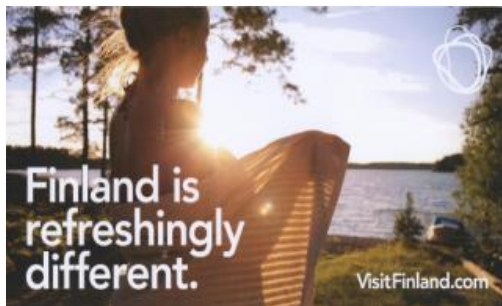
- transnational products and related information?
- UNESCO World Heritage marketed as tourism product?
- land- and water based products and related information linked?
- Baltic Sea region perceptible as tourism destination?
- If so, under which aspects?
- Findings and arguments for a common website?

Number of websites:

Evaluation of websites in all Baltic Sea States

Additionally evaluated: websites which seemed to be relevant due to their domain name

In total:



1

Approach

2

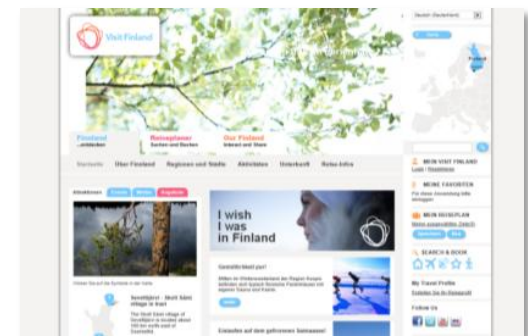
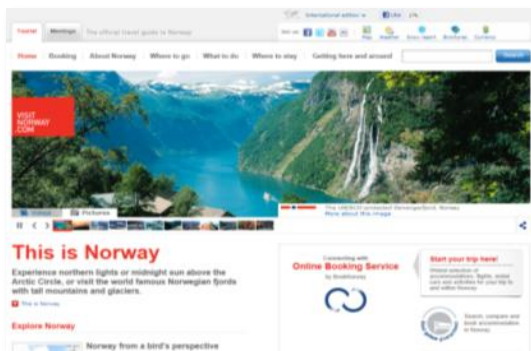
Findings

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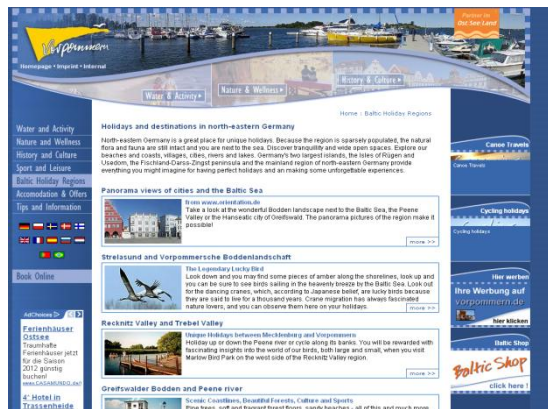
The web-based tourism offer in the Baltic Sea region appears imbalanced

- Differences regarding the utility and quality of information
- Significant differences regarding marketing of cultural and natural heritage, the currentness, offer of languages and integration of social media
- Outstanding: Norway national tourism website with good usability and interactivity, but also nature and culture based attractions including UNESCO heritage sites, tourism related themes and even sufficient information for nautical tourists/ marinas



The term “Baltic” is less used for tourism promotion in the Baltic Sea region than the terms “Nordic” and “Scandinavian”

- Some websites are using the term „Baltic“ to promote their own national destination (e.g. region Vorpommern in Germany, but also websites from Estonia, Latvia and Lithuania)
- The terms “Nordic” or “Scandinavian” appeared more frequently since they were intensively used by the Scandinavian destinations



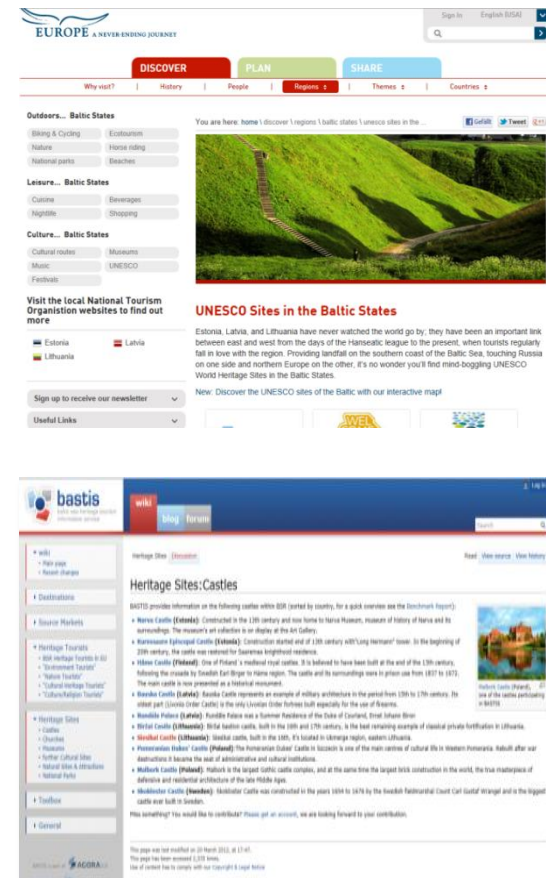
www.vorpommern.de



www.latvia.travel

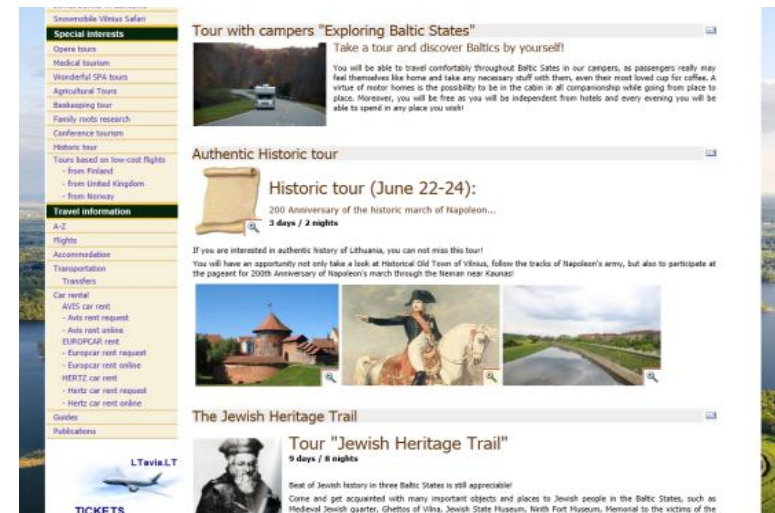
UNESCO world heritage is rarely marketed as tourism product

- Terms such as “national heritage“ or „cultural heritage“ and especially “cultural monument” are very rarely used on websites
- In case UNESCO sites were mentioned, they were in most cases not marketed as tourism products
- In some cases cultural monuments were shown, but not explained, that sites are listed under UNESCO World Heritage



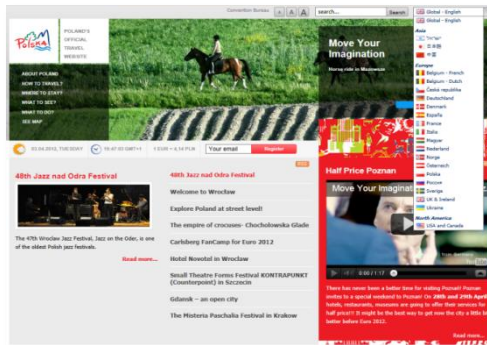
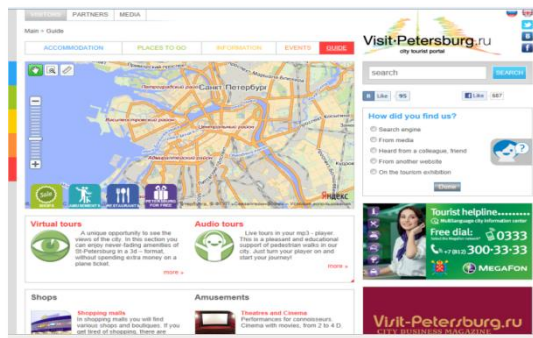
Transnational tourism products are the exceptional case

- Websites are rather promoting their related national destinations without linkages to the comprehensive Baltic Sea area and the related cultural context
- Exceptions are thematic routes (“amber”, “brick stones” etc.) or especially the websites of the three Baltic countries (Lithuania, Latvia and Estonia)
- Example/ good practice:
tourslithuania.com offers different transnational products, such as the Baltic Highlights (7 days), a camper tour exploring the Baltic states or the 9 days Jewish Heritage Trail



The usability of Baltic Sea websites is relatively high

- Mostly current and relevant information provided
- Booking tools sometimes difficult to handle or not working
- Maps only in few cases with interactive applications
- Web 2.0: facebook dominating with 48 websites, youtube 37 websites, tripadvisor 33 websites
- In some cases up to 8 languages (!)



Websites of national tourism organisations are in general more informative

- Better quality in terms of „themes“ und „usability“ as well as „interactivity“/ „social internet“ than other evaluated websites



1

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Further potential to be developed (1/2)

Imbalanced tourism offer/ but specific similarities:

Countries are basically active in similar themes, which are more or less linked to the common history and nature of the Baltic Sea region

Which themes? (umbrella themes nature, culture, water with diversification at country/ destination level, e.g. Hansa, Chalkstone, Amber, islands etc.)

Which related products do represent themes best?

“Baltic Sea”, “Scandinavian”, “Nordic”/ confusing and weakening a common destination brand in future:

The Baltic Sea should be perceptible as comprehensive tourism destination

How to create a clear picture of the destination? One name, which related information as basis for a common communication strategy (e.g. typical coastal landscapes, main harbour cities, accessibility by car/ ferries, train and by air etc.)?

Further potential to be developed (2/2)

UNESCO world heritage/ common identity as common potential:

UNESCO sites and transboundary linkages should be made visible accordant to their importance for the identity of the region

Which linkages and which related routes to be arranged within the Baltic context? (e.g. bookable tourism products, related hotels and restaurants or campsites, accessibility)

Only **few transnational tourism products**:

The crossing of national borders alleviates the broader view of themes, historic sites and linkages and landscapes with their specific ecosystems

Where do transnational products make sense in order to make the Baltic Sea more visible as one tourist destination? Do they represent the key sales arguments of the Baltic Sea? (e.g. cruises, nautic tourism offers, car and cycling routes, city-hopping packages by air etc.)

Baltic Sea Website

Baltic Sea Destination

Baltic Sea Themes

Destination Area

Accessibility

Baltic Sea Image

Entry Gate

News and web 2.0

- Actual information (e.g. weather, ferry connections etc.)
- Hints and comments of tourists

Representative products

- Three products/different segments
- Regional and thematic diversity
- Annual selection

National Tourism Organisations

- Interactive map
- Each destination with different image
- Each destination one „ambassador“

Essential points to be considered for further action

- Agreement on a comprehensive Baltic Sea website (NTO's, selected tourism companies/ pilot products)
- In depth analysis of the existing situation (source markets/ target groups, statistics, accessibility)
- Image survey (samples) and findings of projects (e.g. market research of NTO's, "AGORA 2.0", "Enjoy Baltic")
- Survey on key sales arguments and existing/potential suitable products
- Joint workshop (e.g. ITB 2013) with representatives of national tourism organizations and selected representatives of the tourism industry
- Website concept including Image/ branding strategy (to be discussed with tourism representatives of the region, e.g. national tourism administrations).
- Financing, management and operation of the website (e.g. kick-off project 2014?)
- Contracting and briefing/ supervision of a service provider
- PR and promotion of the website including selected pilot products (min. 3 different segments)

Thank you very much for your attention!

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