10th Baltic Sea Tourism Forum

Insights on Futures of Baltic Sea Region Tourism 2030

Questionnaire results

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1. INTRODUCTION

This report summarises the results of the two online questionnaires conducted before and during the 10th Baltic Sea Tourism Forum held in Turku, Finland, in 2nd and 3rd November 2017. The Forum was dedicated to the theme *The Future of Baltic Sea Tourism*, and special focus was given to topical trends such as digitalization and cross-national cooperation. In order to generate discussion related to the topic, a futures dialogue consisting of two interconnected questionnaires was conducted. These questionnaires tackled possible and preferable futures of tourism in the Baltic Sea region in 2030. The purpose was on one hand to gather visions and insights on futures, and on the other hand to provoke thoughts and orientate discussion towards times that are ahead of us.

In order to take a head start to futures, the first questionnaire was conducted already before the Forum. Using an online questionnaire tool, 60 respondents reflected upon the probability and desirability of six statements concerning the possible futures of Baltic Sea tourism in 2030. Furthermore, they identified drivers that could enable such a future as well as barriers that could hinder the development. The result from the first round are provided in Chapter 2. They were collected and categorised for the second round, which took place during the first day of the two-day Forum in Turku. With an online platform, approximately 60 participants revisited the insights from the first round by ranking the significance of the main barriers and drivers for a successful Baltic Sea region tourism in 2030. They were also asked to comment on the urgency of the drivers, that is to say, how fast the developments should be advanced. The outcomes of the second round are presented in Chapter 3.

The results presented in the following do not aspire to make forecasts or predictions about futures of Baltic Sea region tourism in 2030. Rather, they provide visions and opinions of a specific group of people on how the world around us may develop and why. The organisers wish to express their sincere thanks and appreciation for all the respondents who participated in the dialogue before and during forum. This report is first and foremost intended to generate further dialogue on possible, preferable and probable futures of tourism in the Baltic Sea region. The results will also be utilised in future Baltic Sea Tourism Forums and other development projects. The questionnaires were commissioned by the organisers of the Baltic Sea Tourism Forum and conducted by Finland Futures Research Centre.

2. THE FIRST ROUND: DESIRABILITY, PROBABILITY, DRIVERS AND BARRIERS

The first questionnaire provided six statements about possible futures of coastal and maritime tourism in the Baltic Sea region in 2030. The statements were based on the vision and strategic action fields of Sustainable Blue Growth Agenda for the Baltic Sea region (also referred to as BSR from here onward)[1]. For each of the six statements the respondents were asked the following factors:

1) Probability of the statement on a scale 1-7
2) Desirability of the statement on a scale 1-7
3) Comments on the probability and desirability
4) Drivers supporting the stated future
5) Barriers hindering the stated future

The questionnaire was conducted online with Webropol questionnaire tool. It was open from 21st September until 29th October 2017. The questionnaire link was provided at the registration page of the Baltic Sea Tourism Forum. Next to the participants of the Forum, everyone interested in the possible futures of the Baltic Sea region were welcomed to share their visions in the first questionnaire. Altogether 60 responses were received to the questionnaire. The total number of respondents did not answer all the questions, as it was not mandatory. However, all the quantitative questions were answered by the whole group, so they are comparable to the extent that comparison is necessary. The open questions for the last statements gathered less responses than the first ones. At the final stage of the questionnaire the role of the respondents was asked. As seen in Figure 1, most of the respondents were from public sector (53%).

[1] Towards an Implementation Strategy for the Sustainable Blue Growth Agenda for the Baltic Sea Region. https://publications.europa.eu/fi/publication-detail/-/publication/60adf799-4f19-11e7-a5ca-01aa75ed71a1

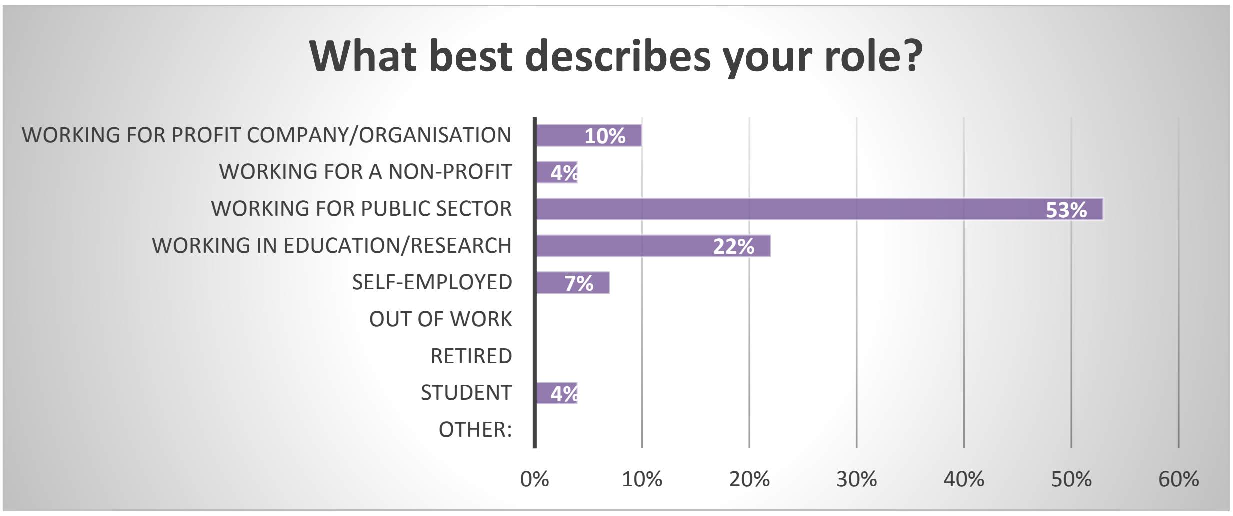

Figure 1. *Roles of the respondents of the first questionnaire.*

In the following, the results of the six statements are presented. Under each statement, the average of the probability and desirability and desirability are presented, with a summary of open text responses commenting the aforementioned. Then, the summary of barriers and drivers is provided.

It should be noted, that the statements to which the respondents were asked to react to, are not describing the possible futures very accurately, and thus they may have been interpreted in very different ways by the respondents. As the aim of the questionnaires has been to generate dialogue and provoke thoughts, accurate estimations were not considered needed. Furthermore, each of the statement describes one specific possible characteristic of future of Baltic Sea region tourism. The statements, as well as the respondents gathered, intertwine, as they are not mutually exclusive.

Statement #1: Sustainable growth and local added value

“In 2030, tourism in the Baltic Sea region is highly valued for its comprehensive sustainability; ecological use of resources, respect for socio-cultural authenticity and long-term economic operations.”

Probability and desirability of the stated future

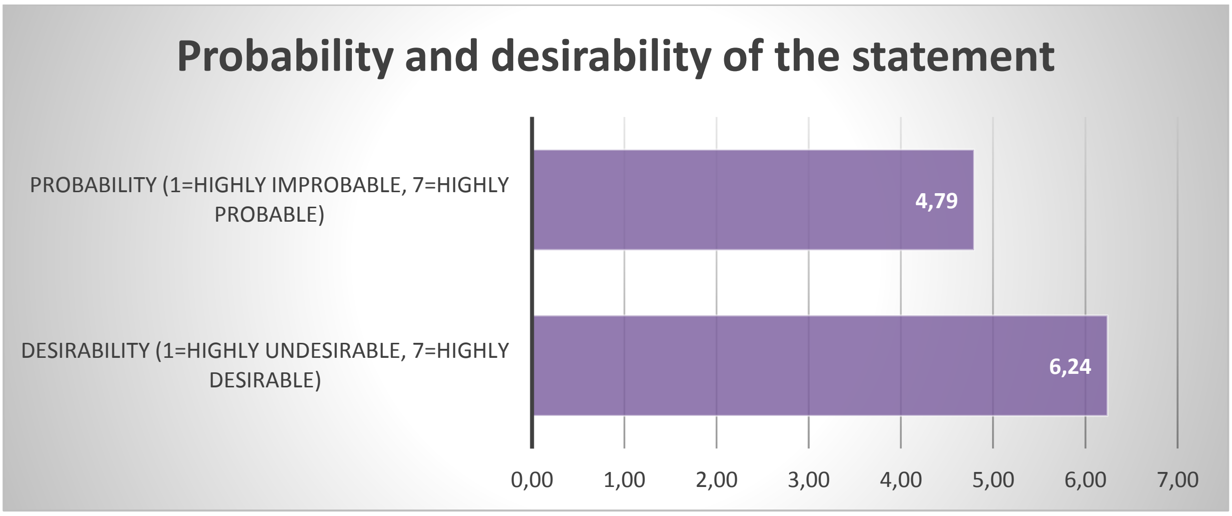

Figure 2. *The probability and desirability of statement #1.*

Comments on the probability and desirability

Out of the six statements, which were all considered rather preferable, statement #1 was seen as the most preferable one. Overall, sustainability was seen as a target that would **increase the value of tourism** in the BSR. In the best case scenario, sustainability goals would be **adapted and implemented on all levels**; local, regional and national. Sustainability was seen as a competitive advantage and adding value for tourism and also local actors. As sustainability is a **worldwide demand**, answering it would result in more income, although it might come from fewer customers. Sustainability would also support **small-scale, local and sectorial tourism,** all of which were considered to become more important in the future. One comment indicated that the surrounding countries of the area have not considered sustainability to a large extent, which would further give a competitive advantage to a more sustainable BSR. This future would also align with the Sustainable Development Goals by the United Nations.

The pressure brought about by **climate change** was considered to increase the transition towards more sustainable tourism. A clean environment would also be a valuable unique selling proposition in a world suffering from the effects of climate change. The development towards sustainability would be supported by investments on **concrete tools for measurement and monitoring**. The necessity of co-operation was emphasised in the responses.

Although a more ecological use of resources was considered as a probable, and even a self-evident future scenario by some respondents, there were more comments anticipating for futures where a sustainable is not probable or even a priority. One respondent estimated that if environmental sustainability is already high on the agenda for major tourist destinations, it becomes a factor that is **taken for granted** instead of becoming a competitive advantage.

It was also noted that **the goal may be too far**, as the environment is already facing severe challenges, i.e. the pollution of the Baltic Sea. **The lack of commitment** as well as the **lack of a political or organisational power** to lead the transition were considered to increase the improbability. Sustainability or its value may not be understood by everyone. The concept may also be understood in different ways. Furthermore, **the differing standards and implementation** of sustainability goals were estimated to differ between BSR countries, which may create mismatch and disagreement.

Interestingly, sustainability in terms of the environment was considered as a more probable goal to reach, whereas **the respect for socio-ecological authenticity** and **economical sustainability of operations** were seen as harder challenges. A robust strategy was seen as beneficial.

Solutions were also provided. One respondent suggested that the long-term policies should concentrate on ***tourists*** instead of ***tourism**,* meaning that next to developing business and infrastructure also the mentality of a traveller should become more sustainable. Overall, the transition towards sustainability was seen as a challenging and lengthy, yet a necessary and a desirable process, benefiting tourism, environment and communities in the BSR.

Drivers supporting this future

1. Customer and market demand
2. Climate change and global warming; BSR moderate in climate
3. New technologies
4. Joint social campaigns
5. Common policies
6. Cooperation and shared goals of BSR countries, NGO's, science, business and administration
7. Sustainable Development Goals (SDGs) by the United Nations
8. Increased tourism from China and worldwide
9. Ecological branding and eco-tourism
10. Better accessibility
11. High-quality services and products

12. Skilled workforce
13. Growing sustainability awareness and favourable attitudes
14. Clean environment
15. Political will and pressure
16. Open data and access to information
17. Commitment of different stakeholders
18. Practical and financial support in implementation of sustainable actions
19. Adaptation of circular economy

Barriers hindering this future

1. Lack of cooperation
2. Disregard for the environment and prioritising economic success over sustainability
3. Lack of long-term commitment
4. Insufficient economic resources
5. Increased environmental pressure from mass tourism
6. Pollution
7. Poor economic performance or economic depression due to seasonality
8. Poor implementation of sustainability programs
9. Lack of legislative or governmental pressure towards more sustainable solutions
10. Misunderstanding the concept of sustainability
11. Political inconsistency and instability
12. Nationalism and populism, me vs. us attitude
13. Migration flows as a threat to socio-cultural authenticity
14. Insufficient development of green technologies
15. Lack of expertise

Statement #2: Marketing and promotion

"In 2030, innovative marketing concepts (e.g., clean air tourism campaigns) and diverse promotion tools convey a clear, common Baltic Sea identity, which reaches successfully the relevant target groups."

Probability and desirability of the stated future

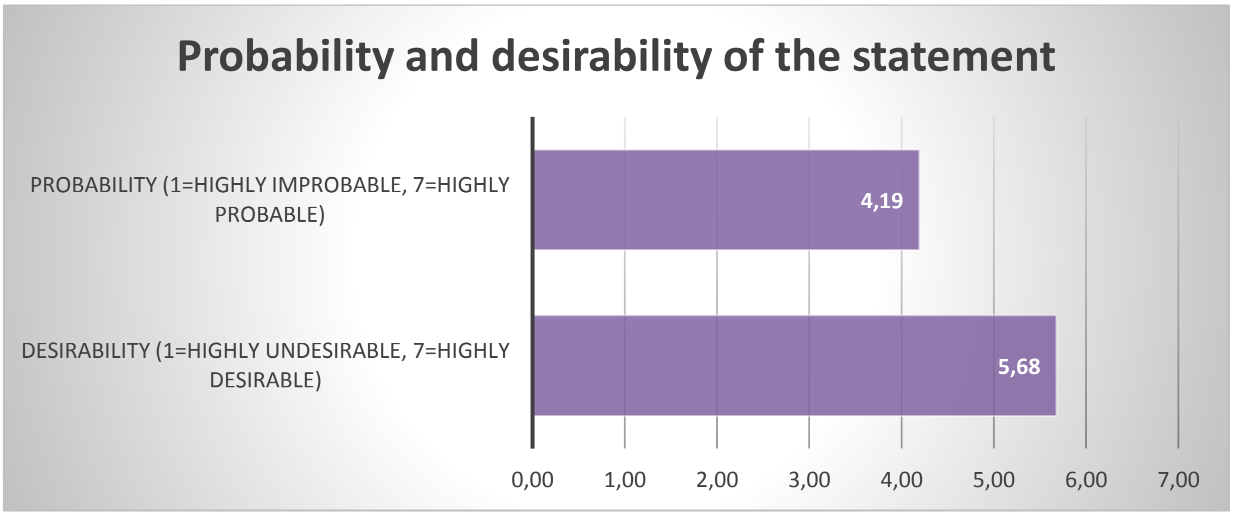

Figure 3. *The probability and desirability of statement #2.*

Comments on the probability and desirability

This statement was the second last in probability as well as desirability out of the six statements. A future where a common Baltic Sea region identity would prevail was questioned mainly because of the **diversity of the region**. Defining shared goals was stated to be difficult even between a smaller amount of countries or regions, let alone a common identity for the whole BSR. It was estimated, that different countries, and even regions would prefer their own identity over a more united one. Next to **differing goals and development stages** within the region, **the competition *between* Baltic Sea region countries** was seen as a possible challenge. Sharing costs between the countries would also be a challenge. One respondent considered a common identity redundant, as tourists tend to **visit specific destinations, cities and villages instead of a whole area**.

The field of marketing is currently witnessing big developments. Well allocated resources and innovative marketing concepts would help to achieve **better visibility**, which was seen desirable. Traditional destination marketing was anticipated to lose momentum, and consumers rely more on **word of mouth**

marketing as well as social media. A common identity was seen as a possibility in specific occasions, for example **long-haul solutions**. One respondent also noted, that marketing campaigns conveying a united BSR for tourists does not necessarily require a common identity as much as a **common Baltic Sea region image**. Accordingly it was suggested, that BSR marketing could be based on cooperative efforts promoting some specific **common features** of the area. Even though marketing was considered important, it was reminded that the **attractiveness of the destinations** is the most important selling point.

Drivers supporting this future

1. Customer demand
2. Technological and digital innovations
3. Co-operation of the Baltic Sea region and the development of the Baltic Sea Tourism Center
4. Increased tourism from i.e. Asia
5. Common interest
6. PA tourism
7. Barrier-free transnational business
8. Sufficient and relevant know-how and education
9. Competition
10. Authenticity of regions
11. Segmentation of markets
12. Prosumeristic approaches and LOHAS-lifestyles
13. Sufficient economic resources and funds
14. Well-functioning mobility
15. The lack of regional or national resources

Barriers hindering this future

1. Competition between Baltic Sea region destinations
2. The lack of co-operation and communication
3. Unwillingness to use new technologies
4. Insufficient resources or funds
5. The lack of long-term commitment
6. Strong and diverse national or regional identities and marketing strategies that are used instead of a common one for the whole area
7. Disagreements between stakeholders
8. Pollution
9. Short-sightedness
10. Poor marketing and communication; reaching customers is insufficient and there may be a mismatch between reality and promises
11. Nationalism
12. Common identity seen irrelevant by tourists
13. The lack of a common main target group
14. The lack of connections between the areas

Statement #3: Product and service innovation

"In 2030 novel business models attract visitors throughout the whole year."

Probability and desirability of the stated future

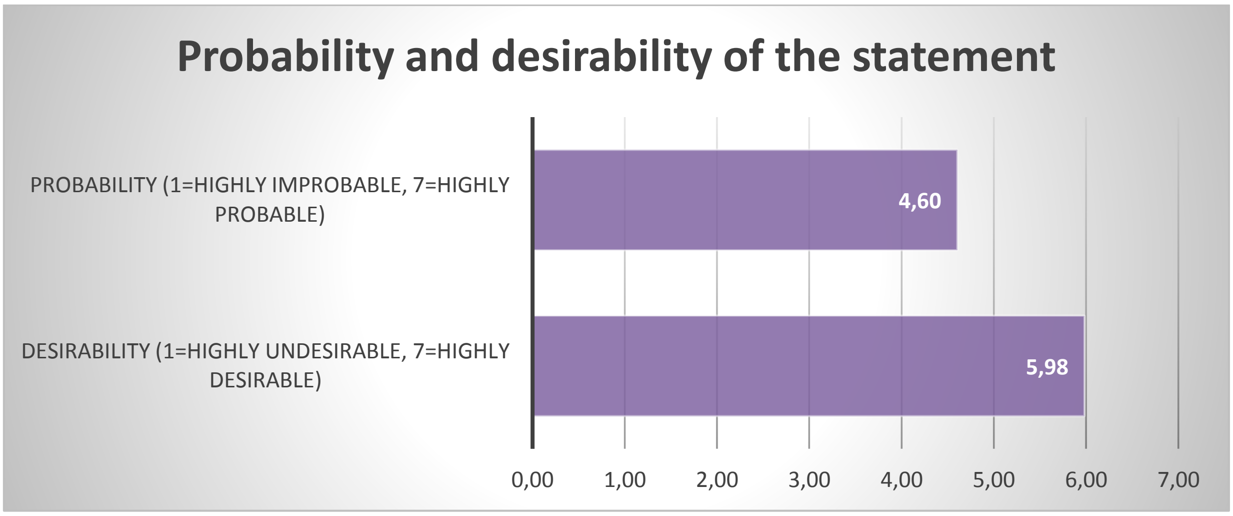

Figure 4. *The probability and desirability of statement #3.*

Comments on the probability and desirability

Global warming was estimated to have an impact the seasonality of tourism on the BSR, as **harsh winters become milder and summers warmer**. Furthermore, globally some places become too hot for convenient travelling, and BSR would gain more competitive advantage. **The pure nature** was also seen attractive, throughout the year.

The improbability of this kind of a future was seen as a continuation of business as usual. Whereas business travellers may visit the BSR throughout the whole year, **mass tourism was estimated to remain seasonal**. One respondent stated a disbelief towards the development of new innovative business models, adding that these efforts will not impact the future of tourism as much as global warming. However, not everyone considered the climate to change. According to some responses, the tourists would stay away during the winter, even though there would be novel activities. This is also a challenge related to **marketing**.

Year-round tourism was seen as a desirable future, as it is considered to be **more sustainable both in economic, environmental and social terms**, when compared to seasonality. A steady flow of tourism throughout the year would also decrease the challenges caused by over tourism. Furthermore, it would also guarantee **a more secure income** for the tourism sector. It was also remarked, that the BSR has **a lot to offer** for tourists throughout the year.

However, **attractive off-season products and ideas** are needed to make this future happen and tackle the challenges of seasonality. As a solution, **support and training** particularly for small businesses was suggested, as it may be difficult for them to invest in the development of creative services, concepts and business models. Again, **the importance of cooperation** was emphasised, for example in marketing strategies. As business travellers were seen as a target group already visiting the area off the season, focusing more carefully on this specific target group was suggested. Accordingly, it was notified that there is **a myriad of reasons and motives to** travel.

Drivers supporting this future

1. Customer demand for novel experiences and authentic destinations
2. User-friendly and accessible open data
3. Well-functioning infrastructure
4. Good price-quality ratio; flexible prices and off-season prices
5. Co-operation between countries and different sectors
6. Positive marketing
7. Increased tourism
8. Strategies
9. Safety
10. Attractive off-season services and products
11. Businesses striving for more stable income

Barriers hindering this future

1. Pollution and the poor state of environment
2. Insufficient resources
3. The lack of strategy
4. The lack of investments
5. The lack of long-term commitment
6. Unattractive climate with cold and rainy winter
7. Poor marketing and difficulties to change the brand
8. Information noise
9. The lack of innovative business models

Statement #4: cooperation between actors and destinations

"Destinations and actors cooperate in a cross-cutting and horizontal manner across the Baltic Sea region.
Local stakeholders are engaged in strategy processes."

Probability and desirability of the stated future

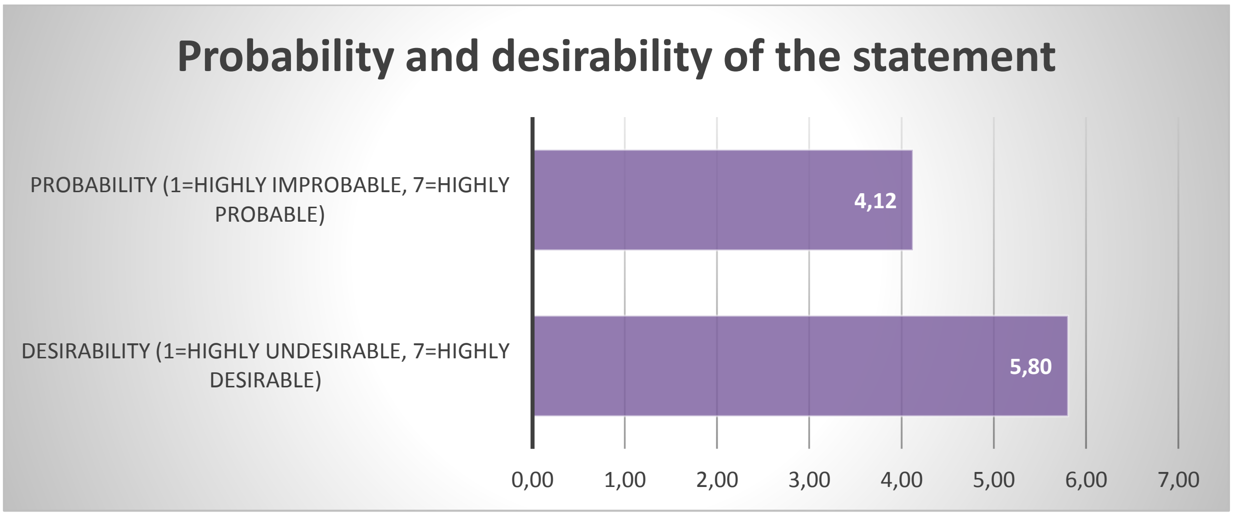

Figure 5. *The probability and desirability of statement #4.*

Comments on the probability and desirability

The future described in statement #4 was seen as the least probable one. This is particularly interesting, considering that cooperation was identified as a necessary driver for all the six futures statements. The comments referring to the future as a probable one noted that cooperation is **highly valued** and there are already **well established traditions** already existing. One respondent simply answered, that **"*This is the future*"**.

The improbability related to this future stems from **the lack of resources and time** to participate, short-sightedness and prevailing **negative attitudes** towards cooperation. A grand challenge would be the **engaging of all stakeholders**. For example, small organisations do not have sufficient resources to participate in strategy processes, even if they would be considered necessary. Cities and destination management organisations were mentioned as examples of key stakeholders to be involved, but who may not yet acknowledge the full potential of the effort.

Cross-cutting and horizontal cooperation was seen as desirable, as it would **help to meet the increased global competition.** Local actors were seen as valuable stakeholders, as they are also the ones offering the services. Were the stakeholders better included in strategy processes, proposed action plans would **better match the interests of business owners**. It was stated, that there is **a demand for a good platform for cooperation**.

Suggestions as first steps included **the identification** of a sufficient number of relevant local stakeholders, **an organisation to coordinate** the cooperation and **implementation of long term processes** instead of small-scale, short and voluntary-based projects. **Better connections** between cities and different BSR countries would allow visitors travel smoothly from one destination to another, which could be a natural mode of cooperation. In one response it was proposed that the cooperation would be more successful, if it is based on a set of **common general values** shared by the different stakeholders. This would create synergies, which are beneficial for all parties.

Drivers supporting this future

1. Existing cooperation of i.e. politicians, destination marketing organisations and business
2. Sufficient economic resources
3. Diminishing borders between communities and cities
4. Ambition to grow
5. PA tourism
6. User-friendly open data
7. Good governance and support from government
8. Sustainability as a mind-set
9. Shared and commonly defined general values
10. Start-up activities and mentality

Barriers hindering this future

1. The lack of long-term commitment
2. The lack of cooperation
3. Top-down development instead of bottom-up
4. Mistrust
5. Inability to reach local stakeholders
6. Political tensions in Baltic Sea region
7. The lack of coordination
8. Increased global competition
9. Complexity of networks
10. Aging society
11. The lack of marketing
12. Disinterest of stakeholders
13. Unclear goals and lack of strategies

Statement #5: Digitalisation

"In 2030, the customer experience is increasingly digital, using virtual and augmented reality."

Probability and desirability of the stated future

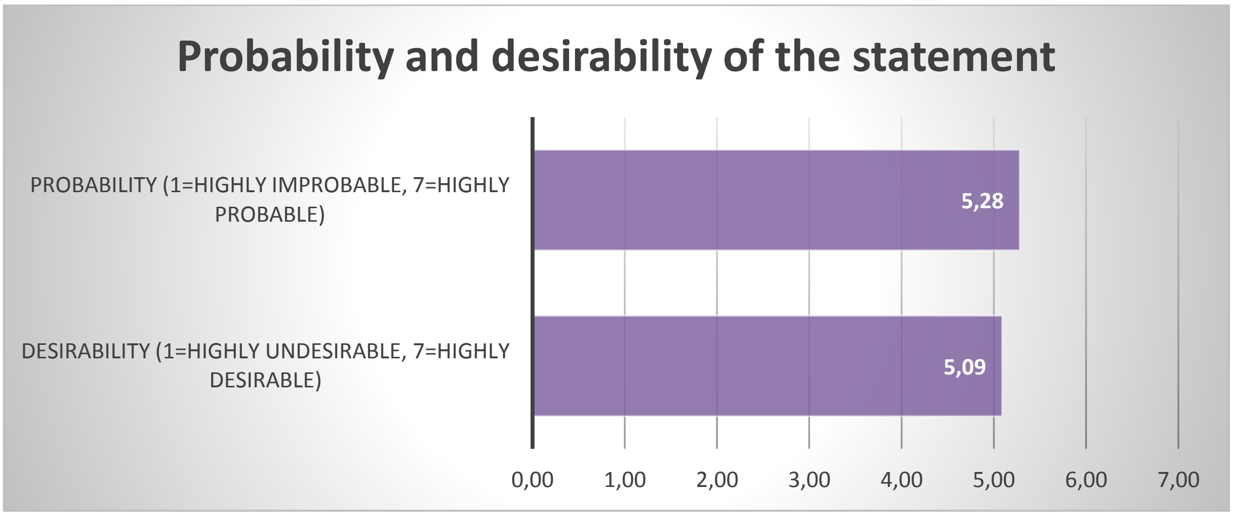

Figure 6. *The probability and desirability of statement #5.*

Comments on the probability and desirability

The statement describing a digitalised future of tourism was the only one that was seen as less desirable than probable. Indeed, this statement was the most probable and the least desirable one.

According to one of the respondents, however, this development is already happening. **The future will be increasingly digital**, and no one can prevent the development. Despite the statement being the least desirable, there was still a lot of potential seen in digital futures. For example, digital solutions would allow the development of **more customised products and experiences**. As there is strong technological know-how in the area, becoming a forerunner of digital tourism was seen possible. The new, tech savvy and smart phone equipped generations were stated to increase the speed of the development, and it was seen necessary to meet the **customer demands of the younger population**. For some, the virtual experience may actually be more interesting than 'the real life'. Augmented and virtual reality also enable **an access to far-away locations and even other time dimensions**, which is also eco-friendly.

On a negative side, virtual reality and augmented reality were seen as **gimmicks** that may give consumers **false promises and disappointments**. Furthermore, it was expressed that **real life experiences are still needed**, and digital technology was seen as **inferior to or even conflicting with authentic local**

experiences. Overall, the potential of virtual and augmented reality were also seen as somewhat counteractive to tourism, as they **may not stimulate 'real' tourist flows**. It was estimated that as people get tire of digital noise, **'human touch' and offline tourism** become more popular again. As a current sign the respondent mentioned the increasing popularity of tour operators and agencies. In general, it was questioned, if everything actually has to be digitalised in the first place. **The lack of access** to digital technologies could also put the smaller actors in an unequal position.

Drivers supporting this future

1. User-friendly open data and access to information
2. Development and adaptation of new technologies
3. Technological expertise in the area
4. Increased skills and know-how
5. Industry lobbying
6. Demand for new experiences
7. Reduced costs from technology mediated experience
8. Tech savvy generation of young users

Barriers hindering this future

1. Demand for real-life experience
2. Data privacy issues
3. Tiredness of gadgets
4. Insufficient resources
5. Outdated marketing strategies
6. Digital solutions are not flexibly adapted by everyone
7. The lack of education and expertise
8. Younger generations not interested in tourism
9. Insufficient economic resources
10. The potential of virtual reality and augmented reality is not adaptable to tourism

Statement #6: Required skills and knowhow

"In 2030, the training of skills and competences of Baltic Sea region tourism workforce is facilitated in close cooperation with educational institutes and private sector."

Probability and desirability of the stated future

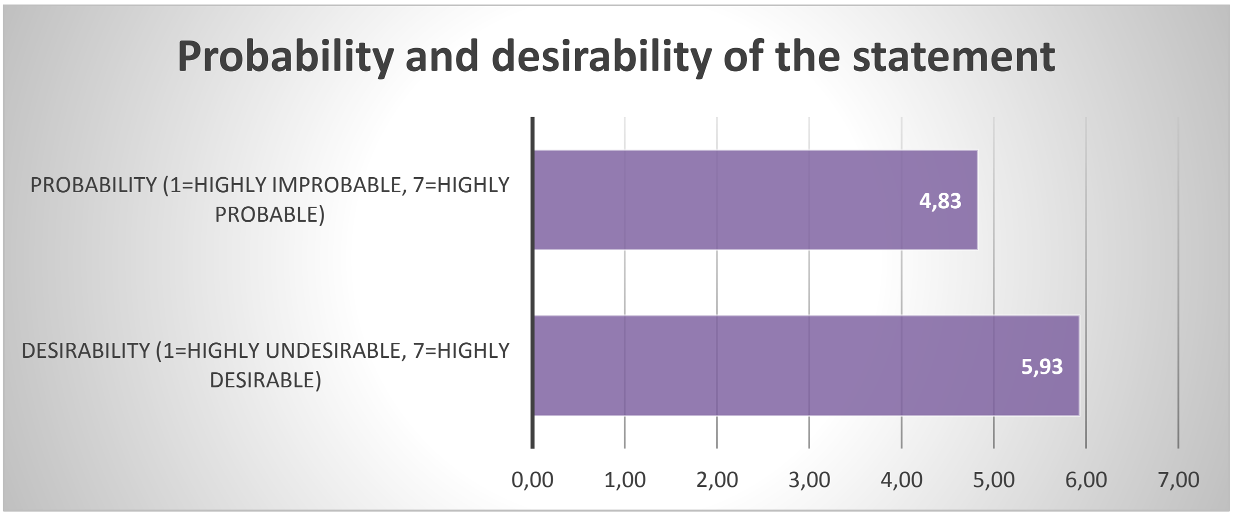

Figure 7. *The probability and desirability of statement #6.*

Comments on the probability and desirability

Cooperation was stated to be mutually beneficial to all the mentioned parties. Moreover, the support from educational institutes and the private sector would be important for flourishing tourism. They offer **valuable networks** and **well established practices** on how to reach results. Capacity building and life-long learning were mentioned to be **a source for economic success**. It was also seen that education may be **the most efficient way to develop better practices**, preferably integrated with practical experience.

Here, **the availability of the required resources** was estimated to be a key challenge. From a business perspective the cooperation would mean involvement in several activities, such as organising joint projects and designing curricula. Although in a long run the graduates would perhaps better match the demands of businesses, in a short term the cooperation calls for resources. Accordingly, **the lack of workforce** in the field of tourism was also mentioned to hinder the development. Furthermore, the concern of tourism as an attractive field to be employed in was expressed; *will there be enough people who want to work in BSR tourism in 2030?* Although the cooperation was said to be a common goal for different stakeholders, it was still estimated that there might be **a mismatch of interests**.

Drivers supporting this future

1. Co-operation
2. Joint curricula
3. Shared vision of competences and skills
4. Shared resources
5. Booming economy
6. Educational systems
7. Distant learning/training
8. Vital networks
9. Successful pilot-projects

Barriers hindering this future

1. The lack of co-operation between public and private sectors as well as BSR countries
2. Controlling states
3. Insufficient resources
4. Short-sightedness
5. The lack of interest and suitable partners
6. Competition
7. Changing environment
8. The lack of long-term commitment
9. Cultural differences
10. Political differences

Summarising the first round: 15 barriers and 15 drivers

Out of the six futures statements, five were seen as more preferable than probable. Overall, this indicates that the statements based on the Sustainable Blue Growth Agenda for the Baltic Sea Region are rather well agreed upon as preferable ones. However, in order to reach these goals, work and cooperation is required. It is also important to note that desirability may more often be considered from a point of view of the respondent as an individual, whereas the probability is seen to be influenced by a more complex and various set of factors.

These different factors were listed accordingly for each of the statements. As each of the six statements described a different outtake on futures, each of them also had their own characteristic drivers and barriers. However, there were some factors that were considered to have an influence to many or most of the futures states. One driver seems to rise above the others when looking at all the statements. **Cooperation** in many of its forms, between BSR countries, different stakeholders and sectors as well as neighbouring countries, was mentioned to be a supporting driver in five statements out of six. The importance of partnership aligns with the small gap between the probability and desirability of the statements. It is acknowledged that the preferred future will not be accomplished without collaboration. Interestingly, statement #4, which describes a future of cooperation between actors and destination, was estimated as the least probable. The following three barriers were mentioned to influence five out of the six stated futures; 1) insufficient economic resources, 2) poor marketing and 3) the lack of long-term commitment. **Insufficient economic resources** were related to unsustainable business models and poor economic performance in general, partly related to seasonality. The lack of resources would also force the tourism businesses to concentrate on short-term economic survival, which would not allow the development of new concepts and innovations. The inability to reach the right target groups was considered as a significant barrier, and also a challenge to tackle in a world where communication is constantly changing. In other words, outdated, **poor marketing** could prevent the success of otherwise attractive destinations. **The lack of long-term commitment** to cooperation, strategies or common goals was seen as a crucial barrier during the first round. In worst case scenario no one is committed to make the BSR tourism better.

All the results referring to the barriers and drivers in the first questionnaire round were clustered as 15 main barriers that may hinder and 15 main drivers that may enable successful Baltic Sea region tourism future. They provided a starting point for the second round of the futures dialogue conducted during the Baltic Sea Tourism Forum. The lists of 15 barriers and 15 drivers are presented in the following, with the brief explanations that were provided in the second round.

15 main barriers

1. **Lack of cooperation between BSR countries**

Cooperation between BSR countries is considered unnecessary. The countries see each other as competitors. The communication between the countries is minimal.

2. **Short-sightedness and lack of strategies**

Fast profit and results are prioritised instead of long-term strategies, operations and commitment.

3. **Interregional and international barriers**

Political, legislative, cultural and economic barriers between countries and regions prevent efficient cooperation.

4. **Poor shape of the environment**

There is a lack of genuine concern for the environment. Mass tourism creates pressure on the environment. Economic interests are prioritised over ecological sustainability.

5. **Insufficient economic resources**

Economic downturn, poor economic performance and lack of investments in the development of BSR tourism.

6. **Inefficient and unsupportive governance**

Lack of political and economic support from government and authorities. Development is top-down instead of bottom-up.

7. **Political tensions**

Political differences, strong national identities and even nationalism stand in the way of cooperation between BSR countries.

8. **Lack of attractive business models and services**

Service culture, products and business models fail to meet the fast developing customer demands.

9. **Underdeveloped off-season tourism**

Seasonality creates pressure on stable economic performance. Off-season product development is challenging. Winter does not attract visitors.

10. **Disinterested stakeholders**

Stakeholders are not engaged in the development processes. Advantages of cooperation remain unclear.

11. Poor marketing

Branding of the region is insufficient and destination marketing loses momentum. The right consumers and their individual needs are not reached or understood. There may be a mismatch between promises and reality.

12. Data privacy issues and issues with technology

Digitalisation results in data protection and privacy issues. Unwillingness and inability to adapt new technologies prevails and hinders development.

13. Increased global competition

BSR is seen less interesting than other regions.

14. Lack of relevant skills, expertise and education

Relevant expertise is not identified or it is not accessible. Education and training do not match the requirements of working life.

15. Mass tourism

The emphasis on mass tourism instead of small-scale tourism creates pressure on environmental sustainability.

15 main drivers

1. High-quality services that meet customer and market demand

Continuously developed services and products meet the high expectations and curiosity of individuals and larger groups. Customer demands are understood well and adapted dynamically in development processes.

2. Attractive and safe region

BSR is known for its clean environment, safety and peacefulness. BSR has a lot to offer for the increasing demand for new experiences and locations.

3. Accessible destinations

Diverse transport opportunities and well developed infrastructure guarantee accessibility for all. Good connections between BSR countries allow visiting more than one city at time.

4. Technological innovations and digitalisation

Technology and digitalisation are adapted dynamically. They provide novel experiences and services as well as a better access to destinations.

5. Good governance and political support

BSR tourism has national and regional political support. Policies are compatible with tourism strategies and support desirable, sustainable and long-term development.

6. Cooperation between countries, sectors and actors

BSR tourism is developed together, with shared resources. Cooperation takes place in different networks of countries, regions, different stakeholders, projects and sectors. Borders between communities, cities and actors are diminishing.

7. Shared vision and goals in BSR

Common goals are continuously discussed and developed. All sectors, countries and stakeholders are invited to participate.

8. Increased tourism

Tourism is estimated to increase in following years, especially from Asian countries.

9. Sufficient economic resources

Sufficient funds and sustainable financial situation ensure long-term economic operations and development.

10. Well-targeted marketing and branding

Target groups are reached and convinced efficiently. New forms of marketing are adapted and implemented well on time.

11. Skilled workforce and up-to-date education

Educational institutes provide high-quality teaching together with private sector and wide networks. The importance of continuous training for successful tourism is widely acknowledged.

12. User-friendly open data & access to information

Up-to-date information about destinations and services is easily available and serves the demands of different users.

13. Competition and ambition to grow

Global competition is met with ambition. Entrepreneurial mind-set, innovative attitude and investments fuel the development.

14. Competitive price-quality ratio

Affordable prices attract tourists especially off-season.

15. Long-term strategical thinking and commitment

Long-term strategies are developed together and commitment to them is strong on all levels.

3. THE SECOND ROUND: RANKING THE SIGNIFICANCE

The 15 common main drivers and 15 common main barriers influencing the futures of Baltic Sea region tourism identified in the first round provided the starting point for the second round of the dialogue. During the first day of the forum, participants were asked to revisit the results from the first round by ranking their significance for a successful futures of BSR tourism. Furthermore, they were asked to evaluate the state of urgency of the drivers they considered the most significant. The opinions were collected through a digital platform realised by Oy Fountain Park Ltd, which consisted of five pages.

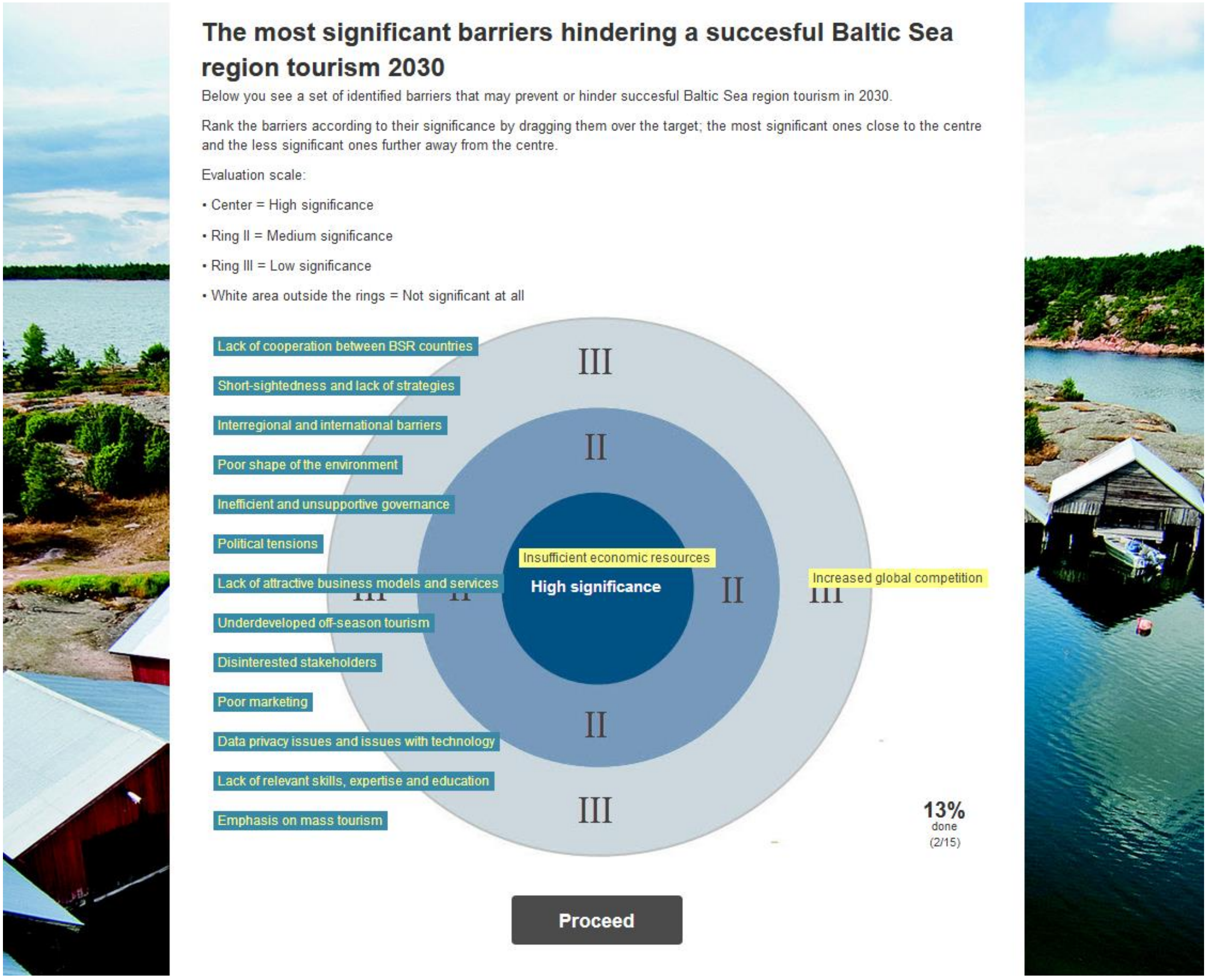

Figure 8. *Screen shot of an example answer given on the digital platform utilised in the second round of the dialogue. The first page of the digital platform questionnaire in the second round. Here, the participant is asked to evaluate the significance of the barriers hindering a successful Baltic Sea region tourism 2030. In this example answer, "Insufficient economic resources" is evaluated of high significance, whereas "Increased global competition" is evaluated to have no significance at all. 13 barriers on the left hand side have not yet been evaluated yet.*

On the first page of the questionnaire, as demonstrated in Figure 8, the respondents were asked to evaluate the significance of 15 barriers (listed at the end of Chapter 2) hindering a successful Baltic Sea region tourism in 2030. The respondents were asked to rank the barriers according to their significance by dragging them with their mouse or finger on a touch screen, so that the most significant barriers were placed close to the centre and the less significant ones further away from the centre. The centre of the figure was 100%, and the farthest white areas were 0%. The descriptions of each barrier, also provided in the previous chapter, became visible when clicking the title of the barrier. The results of this phase are provided in Figure 9. After the ranking, the second page provided a comparison of respondent's ranking vs. the average of all respondents. On the third page the participants were accordingly asked to rank the 15 main drivers (listed at the end of Chapter 2) according to their significance. These results are presented in Figure 10. Again, a comparative summary followed on page four. Finally, on the fifth page the respondents were asked to evaluate the urgency of the top 5 most significant drivers they had chosen in the previous phase. The given alternatives on how fast we should act on the identified drivers were 1) within the next year, 2) by 2020, 3) by 2025 and 4) by 2030. Figure 11 provides the results on the urgency of the drivers.

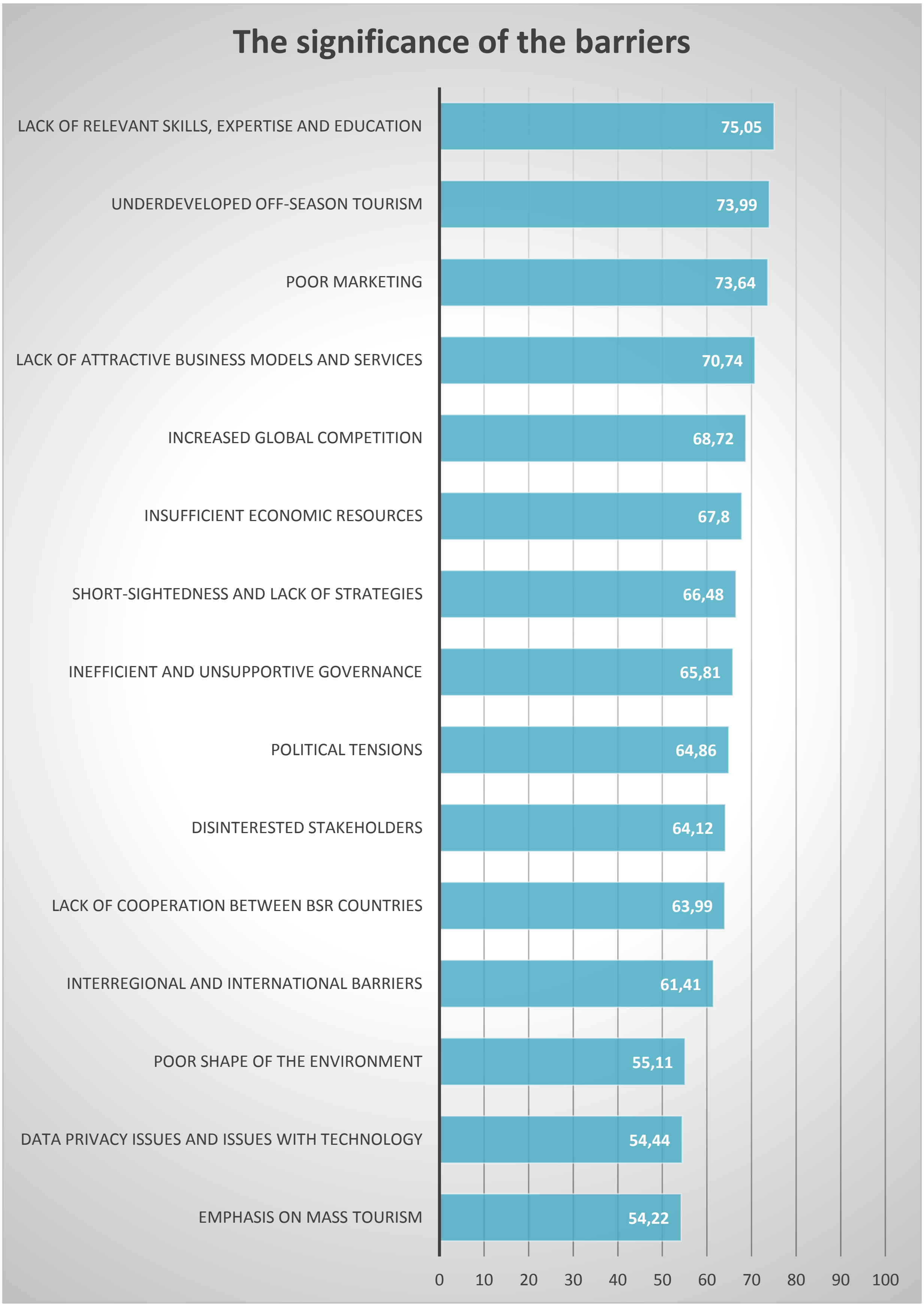

Figure 9. *The significance of the barriers that may hinder a successful Baltic Sea region tourism future. Scale: 0-100%, where 100% is the most significant.*

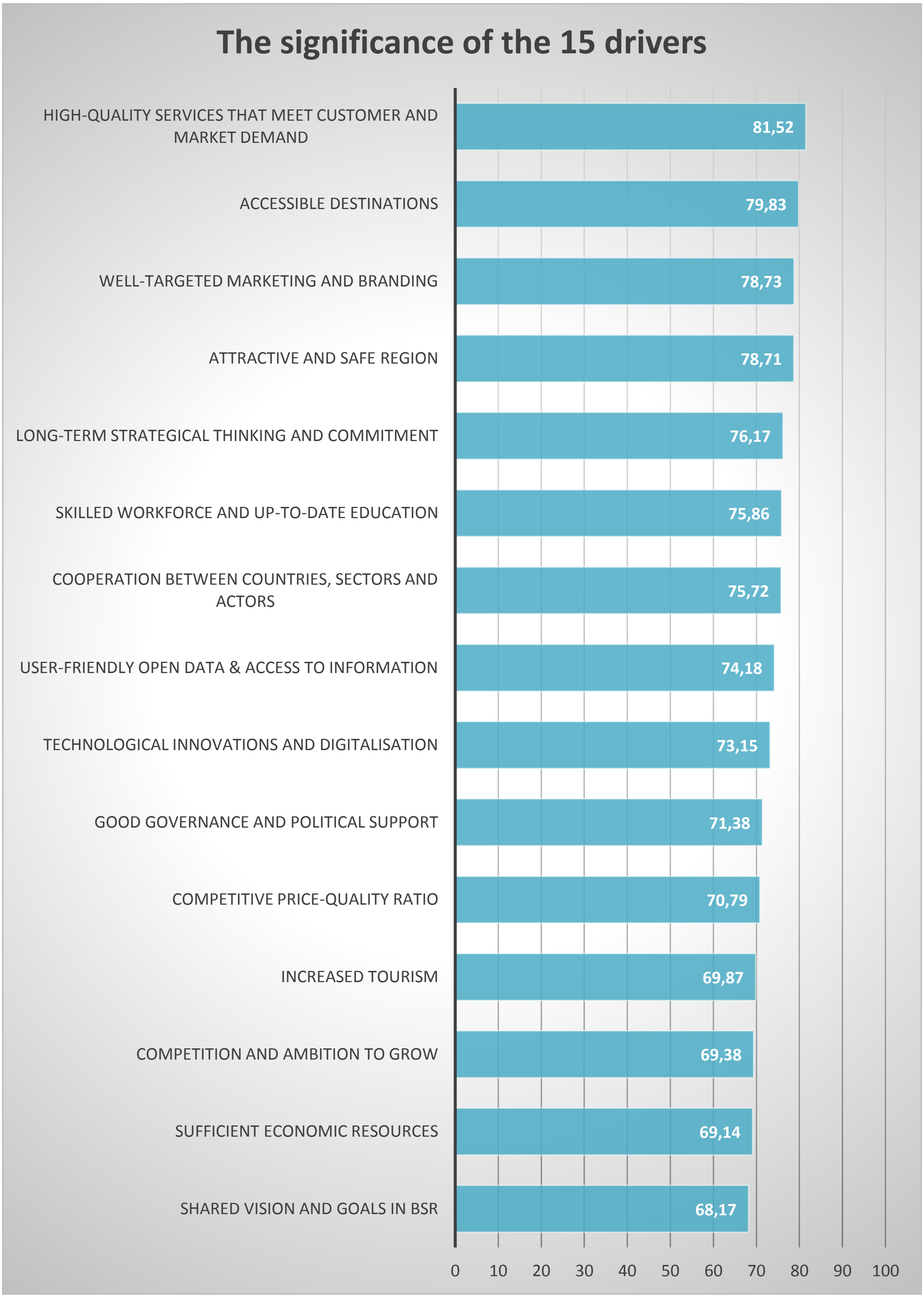

Figure 10. *The significance of the drivers that may enable a successful Baltic Sea region tourism future. Scale: 0-100%, where 100% is the most significant.*

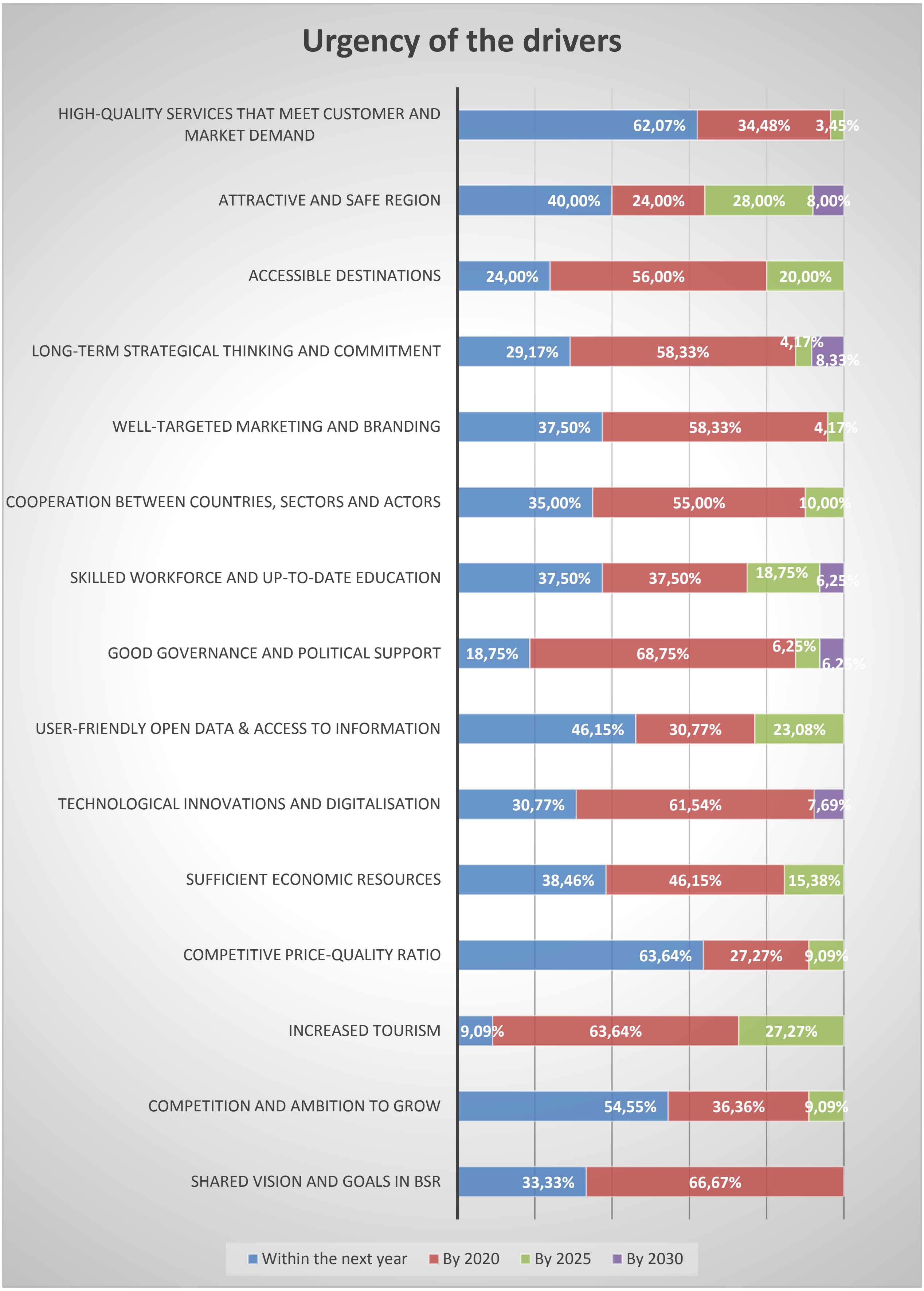

Figure 11. *The urgency of the drivers. Here the respondent ranked her/his top 5 most significant drivers according to how urgently she/he considered they should be addressed.*

Summarising the second round

During the second round respondents revisited the insights from the first round by ranking their significance in supporting of hindering preferable futures of Baltic Sea region tourism in 2030. The most significant barrier to hinder or even prevent a desirable BSR tourism future was **The lack of relevant skills, expertise and education**. During the first round it was described as the lack of relevant expertise, mismatch between the education and working life or the hardships in identifying the required know how. **Underdeveloped off-season tourism** was ranked as the second most important barrier. This factor was seen to cause unstable economic performance during the first round. The third most significant barrier was **poor marketing,** which was also estimated to impact futures widely in the first round of the questionnaire.

Overall, the drivers were seen as more significant for futures than the barriers, when comparing the average of all the rankings. The most significant driver supporting the desired future was considered to be **High quality services that meet customer and market demand,** which was described as services and products, which meet the high expectations of customers, during the first round. The respondents ranked **Accessible destinations** as the second most significant driver. In the first questionnaire, better transport opportunities between destinations and countries as well as well accessible infrastructure were emphasised. The third most significant driver was **Well-targeted marketing and branding**. This aligns well with the most significant barriers as well as the results from the first round, where the topic was described as efficiently reached target groups and up-to-date marketing results.

During the second round less importance was given to cooperation and shared goals. Rather surprisingly, **The cooperation between countries, sectors and actors**, a widely emphasised driver during the first round, was ranked as only the seventh most important one. Although the comparison between the rounds is not completely legitimate, as there was no quantitative evaluation during the first round, this observation is ponderable. Also interestingly, **Shared vision and goals in BSR** was ranked as the least significant driver during this round.

Finally the respondents commented on the urgency of the most significant drivers. The top two most urgent drivers enabling a preferred future are tightly connected to services and customer experience. The respondents considered, that **Competitive price quality ratio** was the driver that should be advanced most urgently. The second most urgent driver was **High quality services that meet customer and market demand**.

Overall it was seen that almost all of the drivers should be addressed no later than by 2020. The drivers that not seen as urgent were **Attractive and safe region** and **Increased tourism.** However, this does not necessarily mean that these drivers are seen as insignificant or unimportant. Instead, they may be seen as factors that cannot be solved within the next few years and demand for long-term commitment.

4. CONCLUSIONS

This report provided the results of the two intertwined, yet independent questionnaires on futures of Baltic Sea region tourism in 2030, conducted before and during the 10th Baltic Sea Tourism Forum in fall 2017.

As has been noted, the results of the two questionnaires do not aspire to provide predictions about futures. The purpose of the exercise has been firstly to gather visions and insights on futures. The results highlight the importance of cooperation, high-quality services, marketing and accessibility, among other things. The lack of relevant skills, economic resources and long-term commitment were seen as major barriers hindering a preferable future. To clarify, the results do not indicate a unanimous Baltic Sea region voice. For example the comments on the desirability of different statements during the first round provide different viewpoints and opinions on what kinds of developments are found preferable. However, there are great many things that are agreed upon, as shown above.

The second purpose has been and orientate discussion towards times that are ahead of us. With this in mind, we return to the data of the first questionnaire. Commenting the probability and desirability of a comprehensively sustainable Baltic Sea region in statement #1, one respondent stated that the sustainability goals should indeed be implemented in all levels from municipalities to states, adding that they should not remain merely as "*pretty words at seminars*". Although the role of forums and seminars as a platform of getting together is vital, discussing futures should not be cease in between these important occasions. The desirable future of Baltic Sea region tourism is defined and made continuously and together.