Strategy Paper

Sustainable Tourism Development in the Baltic Sea Region

Second draft, 12.10.2011

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Drafted by

NIT - Institute for Tourism Research in Northern Europe
Wolfgang Günther
Fleethörn 23, 24103 KIEL
Phone: +49 431 666 567 0
E-Mail: wolfgang.guenther@nit-kiel.de

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1. Introduction

On request of the European Council in 2009 the European Commission published the EU-Strategy for the Baltic Sea Region in the COM(2009) 248/3 to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. This Strategy seeks to provide both a co-ordinated, inclusive framework in response to the key challenges facing the Baltic Sea Region and concrete solutions to these challenges. It is accompanied by a detailed action plan (last Version from December 2010).

The Action Plan comprises 15 priority areas which represent the main areas where the EU Strategy for the Baltic Sea Region can contribute to improvements (either through tackling the main challenges or through seizing the main opportunities). In each priority area selected examples for activities - so called *cooperative actions* and *flagship projects* i.e. projects with high significance - are presented. In the Priority Area No. 12 (To maintain and reinforce attractiveness of the Baltic Sea Region in particular through education, tourism and health) one of the two cooperative actions is called *Highlight and optimize the sustainable tourism potential* [by establishing an environmentally-friendly tourism strategy at the level of the Baltic Sea Region (including Russia)] and one of the flagship projects is called *Develop strategies for a sustainable tourism* (12.10) and leaded by the University of Greifswald (Germany). This Strategy Paper on Baltic Sea Region sustainable tourism development is part of the implementation of this Flagship Project.

Aiming at the sustainable development of tourism the Flagship Project 12.10 furthermore is well in line with Baltic Sea Regions and CBSS long-term vision of sustainable development in the BSR. Consequently, the CBSS took up the flagship issue also in their Sustainable Development Strategy 2010-2015, which had been worked out by the members of the CBSS Expert Group on Sustainable Development – Baltic 21 and partners in Baltic 21 Lighthouse Projects as well as other relevant stakeholders in the Baltic Sea Region in early 2011. Hence, this Strategy Paper is also a contribution to fulfill this CBSS Sustainable Development Strategy.

Background of the Strategy Paper

The EUSBSR Strategy Paper BSR Sustainable Tourism Development is not the first attempt to support sustainability in tourism development on a pan Baltic level. It can build on a process which started already with the preparation of the base setting Baltic 21 Tourism Sector Report in 1998. The Baltic 21 Tourism sector was also the driving force for the application for funding of the first Baltic 21 Lighthouse Project AGORA to INTERREG III B Baltic Program. In this project the AGORA Strategy for Sustainable Tourism Development was published. This Strategy Paper is to a large extending based on this AGORA strategy.

Meanwhile the three Baltic 21 Lighthouse projects AGORA, AGORA 2.0 (www.agora2-tourism.net) and EcoRegions (www.baltic-ecoregion.eu) (all part-financed by the EU Baltic Sea Program; INTERREG III/IV B) conducted already numerous activities which stimulate sustainability in tourism development in the BSR:

- AGORA sustainability check for tourism projects,
- AGORA guidelines for market research, product development or strategic cooperation;
- AGORA 2.0 Baltic Sea Heritage Tourism Information Service (www.bastis-tourism.info)
- EcoRegion database of good practices for regional initiatives towards sustainable development and
- Support of 10 Model Ecoregions.

In parallel the EU Tourism Sustainability Group "Action for more sustainable European Tourism" started working and presented their final report in February 2007, which laid ground to the EU Agenda for a sustainable and competitive European tourism (COM/2007/0621 final).

Also the last EC communication on tourism (COM(2010) 352 final: "Europe, the world's No 1 tourist destination – a new political framework for tourism ") confirms the willingness to support the development of sustainable tourism in two of four priorities for actions:

- Promote the development of sustainable, responsible and high-quality tourism;
- Consolidate the image and profile of Europe as a collection of sustainable and high quality destinations;

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All these documents had been taken in account while drafting this Strategy Paper.

2. What is sustainable tourism?

There are numerous different definitions and interpretations of sustainable tourism dependent on the different circumstance under which they had been worked out. The probably most widely-referenced definition of sustainable tourism from the Word Tourism Organization UNWTO states that sustainable tourism is tourism that *"meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to the management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems" (UNWTO, 1996*).

This definition is also used as basis for this Strategy Paper: It is near to the sustainability definition of the Brundtland report (World Commission on Environment and Development, 1987), which serves as reference also for the CBSS Strategy on Sustainable Development 2010-2015: "*development that meets the needs of the present without compromising the ability of future generations to meet their own needs*".

The EU Agenda for a sustainable and competitive European tourism (EC, 2007) names a set of principles which are also well applicable for the Baltic Sea Region und expressively supported by this Strategy Paper:

Principles for sustainability in tourism in the BSR

☐ Take a holistic and integrated approach - All the various impacts of tourism should be taken into account in its planning and development. Furthermore, tourism should be well balanced and integrated with a whole range of activities that affect society and the environment.

☐ Plan for the long term - Sustainable development is about taking care of the needs of future generations as well as our own. Long term planning requires the ability to sustain actions over time.

☐ Achieve an appropriate pace and rhythm of development - The level, pace and shape of development should reflect and respect the character, resources and needs of host communities and destinations.

☐ Involve all stakeholders - A sustainable approach requires widespread and committed participation in decision making and practical implementation by all those implicated in the outcome.

☐ Use best available knowledge - Policies and actions should be informed by the latest and best knowledge available. Information on tourism trends and impacts, skills and experience, should be shared across Europe.

☐ Minimise & manage risk (the precautionary principle) - Where there is uncertainty about outcomes, there should be full evaluation and preventative action should be taken to avoid damage to the environment or society.

☐ Reflect impacts in costs (user and polluter pays) - Prices should reflect the real costs to society of consumption and production activities. This has implications not simply for pollution but for charging for the use of facilities that have significant management costs attached to them.

☐ Set and respect limits, where appropriate - The carrying capacity of individual sites and wider areas should be recognised, with a readiness and ability to limit, where and when appropriate, the amount of tourism development and volume of tourist flows.

☐ Undertake continuous monitoring - Sustainability is all about understanding impacts and being alert to them all the time, so that the necessary changes and improvements can be made.

3. Cooperated Social Responsibility (CSR) in Tourism

Cooperated Social Responsibility (CSR) gains more and more relevance among tourism stakeholders. It is closely linked to sustainable development: The overall goal of CSR is to maximize an organizations contribution to sustainable development. "The essential characteristic of social responsibility is the willingness of an organization to incorporate social and environmental considerations in its decision-making and be accountable for the impacts of its decisions and activities on society and the environment." It is important to underline that CSR is not alone about running selected sustainable projects but to consider social and environmental concerns in the core business of the enterprise and along the entire supply chain.

It implies …
*   both transparent and ethical behavior that contributes to sustainable development,
*   is in compliance with applicable law and is consistent with international norms of behavior,
*   is integrated throughout the organization,
*   is practiced in its relationships
*   and takes into account the interests of stakeholders."

(*Source: Guidance on social responsibility: ISO 26000:2010*)

As this approach is well supported also by numerous tourism enterprises it provides a promising perspective also for sustainability in the BSR tourism industry.

4. Sustainable Tourism potentials and challenges in the BSR

Potentials for sustainable tourism in the BSR

First of all the Baltic Sea Region is a region with an outstanding Nature and Culture. This offers an attractive potential for tourism in general and for sustainability in tourism in specific.

The CBSS Sustainable Development Strategy further pointed out "the region's steadfast commitment to sustainability has produced a strong track record when it comes to sustainable development in both principle and practice." This holds true also for tourism. Numerous projects on sustainable tourism generated a diversity of experiences and know-how. There are designated experts on sustainability in tourism in BSR research and educational institutions as well as in public authorities, tourism associations and private companies. An increasing number of tourism stakeholder commit their self's to sustainability in tourism because they are convinced that this is the best way to develop tourism of the region and offer corresponding products. Travel industry suppliers are developing new green programs and foresighted governments are creating new policies to encourage sustainable practices in tourism.

More and more tourism enterprises in the BSR independent of their size perceive their social and environmental responsibility and take respective measures to improve their performance. Cooperated Social Responsibility (CSR) has the potential to become a common guideline for the tourism industry. This would also mean a major step towards sustainability in BSR tourism.

But sustainability in tourism is also on the rise on the demand side: In many European countries consumer demand on responsible products is growing. In some countries products referring to sustainability register double-digit growth rates annually while the average tourism industry growth is considerably lower.

According to a study ("Is there Demand for Sustainable Tourism") compiled for the World Tourism Forum Lucerne 2011 by scientist of the Lucerne University 2011 (Wehrli et al., 2011) there are clear preferences in favor of sustainable tourism products. Although the respondents are not willing to pay a substantial premium for the inclusion of specific attributes, there is some evidence that potential customers of sustainable tourism products demand completely sustainable products and they are less price sensitive for such a product. The study concludes that sustainable tourism is an interesting market segment with a target group of 22% sustainability aware tourists who consider sustainability as important when booking a holiday. Comparable numbers had been found in an online survey commissioned by WWF Germany and conducted by FUR (WWF, 2009): Here more than 25% of the respondents declared that they will book travel offer considering certain ecological standards in future.

Challenges for sustainable tourism in the BSR

Despite these promising potentials also sustainable tourism in the Baltic Sea Region at first has to face the same challenges of a dynamic and highly competitive market as the remaining tourism:

- Social and demographic development (e.g. the impact of demographic change, changes in the structure of households, behavior and expectations of customers and rising price sensitivity)

- Changing political framework (e.g. environmental policy and its consequences (tax on aviation fuel), measures to relieve unemployment or structural disparities or the latent threat of insecurity in holiday destinations)

- Economic uncertainty (e.g. financial crisis, flat growth in disposable income for large sections of society and the diminishing middle classes)

- Technical development (e.g. adaptation to the development of information & communication technologies (ICT) and their increasing use by consumers and tourism industry, changing transport systems & traffic infrastructure)

- Changing nature and the environment (e.g. consequences of climate change, nature catastrophes, poor water quality and an ongoing loss of biodiversity)

- Increasing global competition (e.g. upcoming new destinations, disadvantage of high seasonality in the BSR compared to other destinations)

Considering current trends of tourism in Europe for next ten years (ETC, 2006; FUR, 2010), it is most likely that a continued growth of tourism in the Baltic Sea Region as in the past is not self-evident. It will continue, but probably with smaller growth rates, if the destinations around the Baltic Sea are able to maintain their position in the global competition and if the economic and political situation allows potential customers to travel.

Changes will most likely rather take place in the structure of tourism demand in the sense that tourism demand and consequently the tourism offer will (have to) become more differentiated. Furthermore, global competition in the tourist industry will often be decided by price. At the same time, however, a tourism offer of a good quality standard is required in order to win customers over and to retain them.

Factors for future success of the tourism sector in the Baltic Sea Region include realistic objectives, a pronunciation of strengths and a precise management of capacities. Relying on the advent of a strong increase in tourism around the Baltic Sea carries the risk of creating more capacities than necessary, causing severe economic, social and ecological problems (Winkler, Karen & Lohmann, Martin (2009)).

Apart from this general economic, social and political framework there are specific challenges for sustainable tourism development in the field of knowledge management in the Baltic Sea Region. There is a limited or at least heterogeneous knowledge about…

a. sustainable tourism and its potentials among tourism stakeholders and suppliers
b. market and consumers demands in particular in SMEs
c. BSR sustainable tourism products among potential customers (e.g. because of a lacking visibility of the products)
d. marketing of sustainable tourism products in particular in the management of cultural and natural heritage sites
e. potentials and methodologies of new information and communication technologies and their practical application

To cope with these general and specific challenges it will need concerted efforts of committed tourism stakeholders in the BSR with a high ability to adapt to the changing environment. Hopefully the promising potentials mentioned above might stimulate enough tourism stakeholders to join forces, to act together in a more visible and synergic way and to push the sustainability in tourism development in the Baltic Sea Region.

5. Vision, goals and aims and for Sustainable Tourism in the BSR

Vision:

As a basic orientation the following vision describes the long-lasting perspective for sustainability in tourism development in the BSR:

☐ Tourism provides a decisive contribution to develop the BSR to a region where ecology and economy work together in a balanced and integrated manner to sustain societies, nature and culture

☐ Sustainability is the guiding principle and standard practice in all types of tourism in the Baltic Sea Region.

☐ BSR Tourism is a vital business sector providing adequate added value and social foundation for the local and regional people.

☐ Tourism activities do not endanger the natural and cultural heritage of the BSR but actively contribute to their conservation.

Goals

This vision is linked to three overriding goals for sustainability in tourism development in the Baltic Sea Region. These goals had been formulated already by the Baltic 21 Tourism Group (see Baltic 21 Tourism Sector Report 7/98) and confirmed by the agora strategy for sustainable tourism development in the BSR (agora 2007):

☐ To sustain a sound environment, safeguarding the recreational quality of natural and man-made landscape and integrating natural, cultural and human environments;

☐ To promote and sustain the competitive quality and efficiency of the tourism business

☐ To create satisfactory social conditions for tourists and the local population

Aims

The three goals are broken down in eight aims for sustainability in tourism in the Baltic Sea Region:

1. Consistency

Sustainability in the sense of this paper is not meant as a feature of selected types of tourism. It should be understood as guiding principle for all tourism activities along the tourism value chain and should be reflected also in political decisions, funding requirements and planning regulations relevant for tourism on international, national, regional and local level.

Furthermore it is important to ensure the compatibility of sustainable tourism, recreational and activity policies with other broader interests as e.g. energy development, spatial planning or nature conservation, environmental protection and the judicious use of natural resources

2. Competence

Sustainability in tourism needs a high level of competence on supplier's side as well on the customer side.

Hence, on one hand activities are needed to raise the awareness and competence concerning sustainability in tourism among potential guests to make them competent and conscious customers, able to distinguish more or less sustainable tourism products.

On the other hand on the suppliers side also profound knowledge is required e.g. on customers demand and market development, on sustainability in product development and on the distribution of sustainable products, but also on the vulnerability of species, habitats and ecosystem and the historical background of cultural sites.

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3. Responsibility

BSR Tourism "sells" culture and nature. A responsible mindset in the use of the natural and cultural heritage in specific but also of the ecological and social environment in general is essential for a sustainable tourism development.

This also includes aspects as
- Reduction of energy consumption/use of renewable energy
- Biodiversity management
- Maintenance of cultural heritage
- Responsible capacity planning
- Consideration of the social situation on the visited site

4. Transparency

Economic, ecological and social costs of tourism products, activities and public as well as private policies have to be visible and comparable for the customer and the public.

Transparency is a precondition for conscious and responsible decision for sustainability.

5. Visibility

Customers can only give credits to a sustainable service, when they can find it and understand its specific quality. Hence it has to be visible at places where the respective target group is looking at and has to be presented in an adequate and convincing way. The fast developing communication technologies, web services and social media offer new opportunities for such presentations that have to be used also for sustainable tourism marketing.

6. Cooperation and Involvement

Development of sustainability in tourism in the BSR is a challenging and comprehensive task which needs contributions and support from more or less all tourism stakeholders. It will be crucial to make as many people as possible in the region be part of the process and also benefit of it.

As sustainability requires a cross sectorial approach by definition in particular partnerships and cooperation horizontally and vertically across sectors will stimulate sustainability in tourism development. An improved dialogue between of the private tourism industry and educational institution as well as research institutions and public authorities is crucial.

7. Quality

Travellers are experienced and well versed in the organizational aspects of their trips and the distribution systems that service them. They are increasingly competent and technically capable to compare and distinguish between products of different quality. They expect high quality experience and service at all levels of expenditure (ETC, 2006).

8. Continuity

Developing the BSR tourism towards sustainability will take time. For a steady progress it will be important to ensure that this process will not lose momentum. Unfortunately many activities are part of public funded temporally limited projects. After closing the projects quite often the gained experiences as well as the personal capacities are not further used. This hinders an efficient progress and leads to interrupted unsatisfying working processes also for the people involved.

Examples for activities to reach these aims are provided in Annex 1.

6. Indicators, monitoring and evaluation of the Sustainable Tourism Strategy Paper

The purpose of the Sustainable Tourism Strategy Paper is to support and stimulate sustainability in tourism development in the Baltic Sea Region. Hence, the success of the paper is given by the development progress towards sustainability in Baltic Sea Region tourism – either on political and administrative level (integration of sustainability in national or regional tourism development plans or (spatial) planning or funding regulations) or on operational level (e.g. tourism offers meeting sustainability criteria, tourism enterprises committed to CSR). To describe the degree of sustainability of these tourism activities it is necessary to have an appropriate scale: Criteria and/or indicators for sustainability in tourism.

Indicators for sustainability in tourism

There are numerous approaches providing criteria and/or indicators for sustainability of tourism either on product level, suppliers' level, destination level, project level or political level. For Example:

- Global Code of Ethics for Tourism (UNWTO,1999)
- Indicators for the development of sustainable tourism in the Baltic Sea Region
  (Baltic 21 Tourism Task Force, 2001)
- Indicators of Sustainable Development for Tourism Destinations (UNWTO, 2004)
- AGORA Sustainability Check for tourism Projects (AGORA, 2007)
- Destination Indicators of the EU Tourism Sustainability Group (TSG, 2007)
- Principles for sustainable tourism in protected areas
  (European Charter for Sustainable Tourism in Protected Areas, 2008)
- Global sustainable tourism criteria and indicators (GSTC, 2008)
- Standards and indicators for sustainability reporting for tourism enterprises (Tourcert, 2010)

All of the mentioned systems have the same basic orientation and are well in line with the goals of this strategy paper. Thus, this paper will not present another set of indicators or criteria. Rather it suggests applying the existing ones.

Monitoring and evaluation of the sustainability strategy paper

Although there are several systems of criteria and indicators it is difficult to measure the progress of sustainable tourism development in the Baltic Sea Region in general with a reasonable effort. The strategy paper proposes three five key figures given a rough indication on the progress of sustainable tourism development in the BSR:

- Number of sustainable tourism development plans on local, regional and national level
- Number of sites with defined limits of acceptable change through tourism
- Number of tourism enterprise in the BSR with a CSR management following IS0 26000
- Number of tourism companies meeting the GSTC Criteria
- Number of tourism products providing information on their carbon footprint

Alternatively or in addition it is suggested to establish a BSR Sustainable Tourism Strategy Evaluation Panel consisting of selected experts on sustainability in tourism representing different groups of tourism stakeholders. The panel would meet once a year and discuss the observed progress in sustainable tourism development in the BSR with respect to the goals and aims of the strategy paper. Success and barriers in the implementation would be identified and recommendations to further the process would be concluded. The results of these regular evaluation workshops would be documented and could be published online and open for public comments for e.g. a 60 days period.

If appropriate, the Strategy Paper would be revised according to the comments.

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Annex 1

Examples for activities referring to the 8 aims

1. Consistency

- ☐ The pan-Baltic and national political level should give incentives and encourage the local level (regions, destinations) to undertake concrete actions towards a sustainable development of tourism.
- ☐ National & regional tourism development plans: Revise them and integrate principles of sustainability in tourism.
- ☐ Financial support for tourism projects from public authorities and private institutions should depend on passing an ambitious sustainability check: No sustainability no money. The AGORA Sustainability Check can be used a methodological starting point.
- ☐ In the assessment of projects applying for public funding, credits should be given, if a sustainable tourism plan and convincing steps for its implementation exist.

2. Competence

- ☐ Develop implementation guidelines for this Strategy Paper tailored for different types of tourism.
- ☐ Communicate and use AGORA guidelines on cooperation, market research and product development for sustainability in tourism.
- ☐ Communicate existing helpful methodologies and tools (guidelines, checklists, handbooks, best practice examples…) and make them easy to access for interested tourism stakeholders (in particular for SMEs).
- ☐ Provide basic information on reasons for and benefits of sustainability in tourism tailored for customers and presented a place where they will find it.
- ☐ Give examples for sustainability in travelling in the BSR for tourist through a media campaign (incl. TV).
- ☐ Run coordinated market research activities on national, regional and local level and stimulate sharing and disseminating of existing knowledge.
- ☐ Support the use of information on tourism trends and market developments(in particular for SMEs).
- ☐ Promote and further develop the Baltic Sea Heritage Tourism Information Service BASTIS.
- ☐ Stimulate the development of new knowledge and promote research on sustainability in tourism.
- ☐ Initiate a pan-Baltic project concerning communication and training for sustainability in tourism (including interdisciplinary round tables and tailor made small training sessions as well as train-trainers programs and information on best practices).

3. Responsibility

- ☐ Support and promote Cooperate Social Responsibility (CSR) certifications schemes meeting the recommendations of ISO 26000.
- ☐ Define limits of acceptable changes (LAC) before exploring new regions for tourism activities.
- ☐ Define and communicate BSR no-goes: tourism activities that must not be carried out in Baltic Sea Region.
- ☐ Strengthen the competence of tourism stakeholders in the field of sustainability in tourism (see aim competence).

4. Transparency

- ☐ Support and promote Cooperate Social Responsibility (CSR) certifications schemes meeting the recommendations of ISO 26000.
- ☐ Improve the quality and quantity of information on the resource consumption of tourism products (social and ecological footprint) communicated with the travel offer.
- ☐ Introduce a pan-Baltic standard for product information in tourism considering the social and ecological footprint of the offer.

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5.	*Visibility*

- ☐ Stimulate to join forces and budgets to be able to realize a professional and visible presentation on the market.
- ☐ Facilitate the access to market information for tourism stakeholders to identify the appropriate communication channels for their chosen target group (e.g. via BASTIS).
- ☐ Stimulate the application of best available IT + e-media solutions, particular for marketing also by SMEs.

6.	*Cooperation and involvement*

- ☐ Introduce pppps: people-public-private-partnerships to implement the participatory approach of sustainable development.
- ☐ Give room for experience exchange and innovation e.g. through round tables with tourism, research, culture and nature protection stakeholders on crucial questions.
- ☐ Catalyze long lasting networks of excellence in sustainable tourism (provider, tour operator & destination level).
- ☐ Communicate best practices for successful cooperation across sectors considering all three dimensions of sustainable development.
- ☐ Join forces with existing pan-Baltic networks connected to sustainability in tourism.
- ☐ Stimulate the cooperation between tourism enterprises, regions, NGOs and research institutions.
- ☐ Improve the coordination and cooperation on sustainability in tourism between national tourist boards.
- ☐ Identify and introduce policies for using synergies of rural - urban tourism cooperation.

7.	*Quality*

- ☐ Introduce and/or promote quality certification system for tourism services.
- ☐ Improve the knowledge on customers' expectation among the tourism stakeholders (Info campaign).
- ☐ Encourage suppliers to offer authentic high quality experiences typical for their regions and make clear that high quality experience do not mean high luxury but needs stringent target group orientation.

8.	*Continuity*

- ☐ Establish or commission an institution to act as a clearing house for sustainable tourism development in the BSR – preferable in a public private partnership.
- ☐ Maintain and further develop the YEPAT Database on tourism projects.
- ☐ Provide financial assistance for ensuring the viability and transfer of outcomes achieved by temporary funded projects.

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Annex 2:

Priority types of tourism for implementing sustainability in tourism in the BSR

Different kinds, types or segments of tourism can be defined in many different ways. With respect to the purpose of this Strategy Paper to give a frame for a successful implementation of more sustainability in the Baltic Sea Region tourism it is suggested to focus the activities at first on those types of tourism which have well organized networks on a pan-Baltic level. The idea is to identify the most promising starting points for the implementation together with people from these associations and to use their communication network to reach the practitioners in the region.

The following types of tourism are proposed:

- Culture Tourism (castles, museums, gardens, parks, monuments, manor houses, …)
- Nature Tourism (focused on nature experience, national parks, wildlife experience…)
- Rural Tourism (focus on rural culture and nature)
- City Tourism (focus on urban culture and history)
- Cruise Tourism

Apart from these five types of tourism four more might be added or addressed later, which are not well covered by the first five but still important for the BSR:

- Beach Tourism (Contact perhaps via participants of the European Blue Flagg Campaign for Beaches)
- Health, SPA & Wellness Tourism (Contact perhaps via respective hotel chains)
- Water tourism (in particular sailing, surfing, kite surfing, diving, etc.; contact via port cooperation and Blue Flagg)
- Mountain tourism (trekking and skiing; contact via respective associations, e.g. Svenska Turistföreningen (SFT))

At last there are two more types of tourism which might be combined with city tourism, but could also be taken separately as they have very specific aspects to consider when they want improve their sustainability performance:

- Event Tourism (Hanse Sail, Kieler Woche, Sports Tourism…)
- Business Tourism/Congress Tourism

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