

The BEST Project · B7 Exchange on Sustainable Tourism

Green Paper

Sustainable Tourism in the B7 islands



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Commissioned by Bornholms Amt, on behalf of the BEST Project



BEST

B7 Exchange on Sustainable Tourism



INTERREG IIC Baltic Sea Region



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Preludę

Nothing in this country is as strong a pull factor for tourism, both at home and abroad, as our waters in all their forms: the Sea, lakes, streams. The summer and the water belong together. Summer and sun add an irresistible fascinating power to the wet element for everybody. Dänemark, das Land des Meeres! These words sound like a fanfare, the best tourism slogan, we have ever had and we will ever get. Therefore it is so import that we keep our coastline and that the access to them is kept at such a standard that it fully can contribute to the promotion of tourism.¹

Said by A.J. Poulsen in – well, yes, make a guess ... right, it was at the annual meeting of the Jutland Tourism Association in 1938.

Sustainability issues are by no means new issues.

¹ Schultz, Hans Joakim, Dansk Turisme i 100 år, Århus, 1988, p. 164,author's translation

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The concept of sustainable tourism has received much and ever growing attention during the last 10 years. It is based on the report by World Commission on Environment and Development to the United Nations (UN) General Assembly, entitled *Our Common Future*,² defining a sustainable society as one that

... meets the needs of the present without compromising the ability of future generations to meet their own needs.³

This concept was taken up by the Agenda 21, which was adopted by the UN Conference on Environment and Development, in Rio de Janeiro in 1992. A specific Agenda 21 for the Travel and Tourism Industry issued by the World Tourism Organization in co-operation with other organisations in 1995 then followed this general Agenda 21 document.

A concept, which is equally difficult to disagree upon, as it is to agree on a joint framework for measuring its consequences, let alone on how to standardise its implications and use them in a tourism development and a marketing context.

Within this difficult task this Green Paper tries to discuss definitions of sustainable tourism development and come up with some humble suggestions that may be feasible to be carried out on the seven largest islands in the Baltic Sea (B7).

² Report prepared by the World Commission on Environment and Development to the United Nations General Assembly, 1987, *Our Common Future*, Oxford, UK, Oxford University Press.

³ Here cited from: World Tourism Organization, 1998, *Guide for Local Authorities on Developing Sustainable Tourism*, Madrid

2 The BEST project

Since the fall of the iron curtain the seven largest islands in the Baltic Sea have worked hard at establishing and increasing co-operation amongst each other. This resulted in 1996 in adoption of a common strategy for the 21st century, aiming at creating a positive development for all islands through joint efforts. Several areas of efforts were defined, here amongst tourism. Also success factors were identified.

In the end of September/beginning of October 1999 a conference was held in Saaremaa within the framework of the BEST project. Here the overall objectives for the project were described as:⁴

- create an inter-island cooperation network to promote the development of sustainable tourism
- establish common systems for codes of conduct, bench-marking and quality control
- adopt and publish a Green Paper “Sustainable tourism in the B7islands - definitions and markets
- initiate at least three development projects
- make a B7 contribution to the VASAB and Baltic Agenda 21 processes.

Also during this conference eight workshops were held, these workshops had four main aims, as stated in the conference report:⁵

- promote and kick off the establishment of an inter-island cooperation network
- start the process of establishing common systems for codes of conduct, bench-marking and quality control
- create a first basis for the B7 Green Paper - “Sustainable Tourism in the B7 islands”
- start a discussion about future projects (short term - mid term - long term)

⁴ Cited from: Documentation, The BEST project, Baltic Exchange on Sustainable Tourism, Conference on Sustainable tourism in the Baltic Seven Islands, Opportunities and challenges, Saaremaa, Estonia, 30 September - 1October 1999; The BEST project - aims and objectives, by Mr Ulf Johansson, project leader for the BEST project, Gotland, Sweden

⁵ Op cit

The eight group's work can be summarised with the following ideas:

- develop a common B7 festival (a rotating event to take place on a different island each year)
- reduce/stop the use of plastic mugs and plates in the tourism industry
- within a year to start common marketing of the islands
- within a year to have a B7 tourism information operating
- initiate a summary/analysis of existing (eco) label systems, discuss experiences between the B7 islands and start a newsletter by employing a professional journalist covering all the islands
- B7 cook book on fish
- Homepage for the local people
- Family exchange to learn sustainable living and development
- Baltic Islands Food Festival 2000
- Small steps at a time instead of few steps that are too big
- B7 exchange seminars in order to promote the development of the tourism sector

At this stage we will not comment or discuss these ideas, they are merely listed here for reference purposes and in order to explain the background for this paper.

Participating islands

Throughout the course of the project it turned out that the funds allocated by the European Union to the project did not include the Estonian islands, as matching funds from other programmes were not granted. Therefore this green paper focuses generally on the five EU-islands - Rügen, Bornholm, Öland, Gotland and Åland.

Other projects in the BEST framework

It becomes evident from the above (The BEST project, page 6) that there are several projects within this project framework, apart from the Green Paper. The authors of the Green Paper have thus made contact with Ms Therese Flöjt, Åland, working on a project describing Codes of Conduct, Mr Jan Wigsten, Gotland, preparing a project proposal for future cooperation on Spatial Planning, as well as the work carried out by lecturers Rolf Arnemo and Leif Nilsson of Kalmar University, together with Anders Steene, Lars Kylefors and Jörgen Samuelsson, for the contribution of Öland.

The Green Paper

In March 2000 the Research Centre of Bornholm was asked by Bornholms Amt (the County of Bornholm) to produce a green paper. The authors have tried to do so, in accordance with the resolution of the above-mentioned conference held in Saaremaa previous September.

After the Research Centre was appointed, a workshop was arranged by County officials and held in Copenhagen on 27 and 28 March 2000, where several of the other participants in the project, amongst these the other subprojects, were presented. It became evident during this meeting, that it was quite unclear, what exactly the aim of the Green Paper to be produced should be.

Therefore we would like to stress at this point that the aim of this Green Paper is to:

- provide a workable definition of sustainable tourism development on the seven islands,
- provide a basis for further discussion of future actions and, thus
- provide a catalogue of ideas/strategies for future co-operation.

Working on the Green Paper

Involvement in other projects

The researchers employed to work on the green paper are also involved in other projects with a focus on sustainable tourism development, although the other projects have a slightly different focus.

First, there is another EU financed project, BALDER, working on sustainable cultural heritage management with five themes (Viking, Hanseatic League, Amber/bronze age, Industrial Heritage, Maritime Tourism) at five different destinations. One of these destinations is also a B7 member, which is Gotland, participating in the Hanseatic League sub-project in the BALDER framework.

Second, there is a project on cultural tourism, commissioned by the SOSK (Sydöstra Skåne) and Bornholm cooperation.

Third, Ann Hartl is member of the steering committee for the local pilot Destination 21 in Rønne, Bornholm and labelling scheme, which is under development, for sustainable tourism destinations in Denmark.⁶

Apart from this the researchers have a good knowledge of the five islands in question - unfortunately the knowledge of the two Estonian islands is very limited, and it was not possible within the framework of this project to pay a visit to the islands. With a background in respectively geography and marketing and tourism industry, the researchers complement each other well.

⁶ More about Destination 21 can be read in sections "Destination 21" (page 15)

It has been necessary to narrow this paper, partly because of time constraints, partly because it was felt that issues of socio-cultural sustainability and a focus on cooperation in order to achieve a balanced sustainable development have been less focused upon so far, and thus greater attention was given to these aspects in this report.

Project methodology

It was thus chosen to pay visits to Gotland, Åland and a very brief visit to Öland within the project. Previous to the project, several visits to Gotland, Åland, Öland and Rügen had been paid. Through involvement in Bornholm tourism as well as the Bornholm visitor survey, conducted by the Research Centre, and other studies about Bornholm the knowledge of this island, of course can be regarded as in-depth. Also, with the centre's explicit interest in peripheral area studies and especially islands' problems, an expertise in this field has been established.

Therefore the field visits paid, were mainly points of data collection for the underlying analysis for this green paper, but will not be presented in-depth here, as they can be regarded as a reference framework for the researchers.

This green paper is a document aiming at giving the B7 islands more operational input to their development of sustainable tourism and being a catalogue of ideas on how to reach this.

The idea of this green paper is through a brief analysis of at least five of the seven islands current situation,⁷ and a more in-depth analysis of these islands strengths and weaknesses as well as their opportunities and threats (SWOT-analysis) specifically related to sustainability aspects, to suggest strategies for a sustainable tourism development on the island and to give input to more concrete product development initiatives. It is thus intended to give operational ideas on how to take advantage of the synergy between investments in culture, nature and the environment on the one hand and tourism and business development on the other. This paper will discuss and list indicators for sustainable tourism destinations in the Baltic Sea region and combine these with strategic planning tools.

SWOT-analysis

Strategic planning for a tourism destination is more complicated than for a single enterprise as there is no one who holds complete control of all the stakeholders.⁸ Thus strategic planning at destination level calls for a high level of cooperation and understanding of the problems imposed by stakeholder relations. The stronger the Destination Management Organisation (DMO) the better.

⁷ As mentioned earlier, due to funding reasons, this project has been structured around the following five islands: Rügen, Bornholm, Öland, Gotland and Åland, whereas the two Estonian islands, Hiiumaa and Saaremaa presumably will be able to make use the conclusions and recommendations from this report in their work as well. However, there has unfortunately not been conducted any direct analysis of these two islands.

⁸ According to Freeman (1984) stakeholders are one or more of the following: owners of various kinds, supplier firms, customer segments, employee segments, various members of the financial community, several levels and branches of government, consumer advocate groups and other activist groups, trade associations, political groups, unions, and competitors. Others, i.e. Brenner and Cochran (1991) form a diagram with such stakeholders as stockholders, wholesalers, sales force, competition, customers, suppliers, managers, employees, and government.

The first step when preparing a strategy for sustainable tourism for an island is to get an in-depth understanding of the current situation. It is necessary to obtain a good understanding of both the surroundings and the capabilities within the tourism sector at your island. To get a more systematized insight into the current situation of tourism the SWOT-analysis can be a tool to give a picture of how the destination deals with its surrounding environment and its strengths and weaknesses. When combined with identified opportunities for development and possible threats, one has a sound basis for developing strategies.

Indicators

In order to operationalise your strategies and in order to be able to measure the effect of these strategies, you need to identify some overall indicators for sustainable destination development; merging the strategies of the tourism industry with public involvement in tourism.

However, these indicators are not part of this report, as they need to be formulated by the players themselves in order to be of convincing effect and to receive acceptance amongst the local community. However, you will find an example of indicators below, presented in relation to the work on Destination 21 in Denmark.

A report on tourism certification puts it like this: *In the tourism sector, certification schemes can play an important role in bringing about more sustainable tourism because they provide participating companies with an action plan for improvement. Certification is, however, only one of a suite of tools required to make tourism sustainable. Effective and credible schemes need to be complemented by education, regulation and comprehensive land use planning.*⁹

⁹ Synergy, 2000, Tourism Certification, An analysis of Green Globe 21 and other tourism certification programmes, A report for the WWF-UK

3 Theoretical and analytical framework

Sustainability aspects

Much has been said about sustainability, as it was put by one of the speakers of the last conference: *Sustainable tourism is a concept loaded with unstated norms, values and ambiguity. Recognising this is a first step towards understanding and exploiting the phenomena.*¹⁰

The point is that sustainability has three dimensions: ecological, economic and socio-cultural sustainability.

In relation to these three dimensions it is also important to remember the so-called 5 R's: *Respect, Re-use, Recover, Recycle, Reduce*, which are an important part in how to make sustainability work.

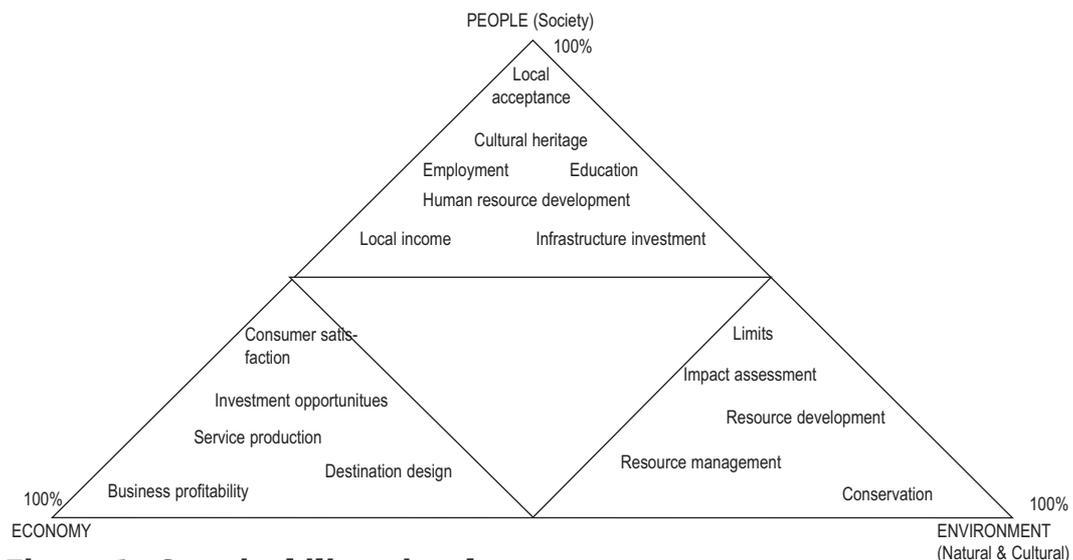


Figure 1 - Sustainability triangle

Source: Lars Nyberg, 2000

As the triangle shown in Figure 1 indicates many different aspects have to be considered when working towards a sustainable destination. There is the reduction of resource use and pollution but also capacity building and human resource development, employment creation, local organisation and cooperation, accessibility of natural and cultural heritage assets and information activities.

The task for sustainable tourism development is to achieve an acceptable balance between the three aspects of sustainability.

¹⁰ Sørensen, Anders and Stephen Wanhill, 1999, Sustainable tourism -concepts and issues, presentation at the BEST conference, Saaremaa in: BESTproject, Baltic Exchange on Sustainable Tourism, Conference on Sustainable tourism in the Baltic Seven Islands, Opportunities and challenges, Saaremaa, Estonia, 30 September - 1 October 1999, Documentation

Working towards sustainability in practice

The tourism industry and international organisations introduced in 1995 the Agenda 21 for the Travel and Tourism Industry. It is now integrated with the local Agenda 21 programmes in many countries.

This means that the tourism business needs to be placed in an Agenda 21 context and that it could be beneficial to find out whether a local Agenda 21 strategy is formulated for the area in question, before starting to create strategies for sustainable tourism development.

There is a growing body of labels and criteria aimed at tourism businesses and other tourism resources to give sustainable management awards and the right for a business or a destination to declare them as 'environmentally sustainable'. The Nordic Swan label can be awarded to hotels, which fulfil the environmental standards specified and checked by an independent auditor. Other labels are Green Globe, Blue Flag, *Grüne Palme*, *Umweltsiegel* etc, all international or national/regional tourism labels or awards applying similar criteria to judge whether an actor is environmentally conscious when managing a specific resource.

Whilst these labels most certainly contribute to an increased focus on environmental issues at a destination or within a certain tourism business, they seldom can be used for immediate marketing purposes. This is partly so, because there simply are too many different labels and thus customers tend to get confused. Also, it has not been proven that these labels have an actual effect on the consumer choice behaviour. In the long run, one may assume that consumers will focus more on environmentally friendly products even when it comes to tourism, and therefore the achievement of an environmental label may inflict in a positive way on long-term sales.

The difficult exercise is to concretise and make the goals operational and combine them with the development of strategies for the tourism industry. Also, focus has been mainly on the physical environment, which is more easily defined and transformed into measurable indicators than the socio-cultural elements of the environment. When it comes to economic sustainability this has been discussed, but is more a question of individual businesses, and therefore represents a problem, when trying to define indicators at destination level. The reader will find more regarding these aspects below.

4 A definition of sustainable tourism development

Sustainable tourism is thus defined as the kind of tourism where natural and cultural resources are preserved, where the local community has accepted tourism as a legitimate and desirable industry and where tourism business can thrive and develop on a long-term basis. This also means that the visiting tourist will experience high quality products and that the destination is not deteriorating because of an overuse of the destination's resources by visitors, in all these respects.

This definition is closely related to the World Tourism Organisation's definition of Sustainable Tourism, which is: *Sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to 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.*¹¹

It is difficult to define something that, as mentioned in the introduction, is so obvious common sense that it is difficult to disagree about that this is a positive concept. However, the concept of sustainability is so broad and has to take into consideration so many different angles that it is a challenge to present a workable definition.

¹¹ Op cit, p. 21

5 Case studies - Examples

from the five islands

The seven islands in the Baltic Sea have many common characteristics in the area of tourism, but also as far as general development issues are concerned. It is islands characterised by out migration, as well as reliance on traditional industries of agriculture and fisheries that have experienced a strong recession within the recent years.

The islands rely on a tourism season that is concentrated in the summer months because of a temperate climate. The industry is characterised by many small and micro-businesses, i.e. husband/wife-operations or single person businesses. Some of these are even part-time driven only. These types of businesses can also be described as *lifestyle businesses*, meaning that they are operated as a lifestyle for the owner, making a living, but not necessarily focusing on profit maximisation, and other market economic terms.

Other joint characteristics are accessibility, where there of course are differences on Rügen and Öland, accessible by a bridge and Bornholm, Gotland and Åland that are only accessible by ferry or air. Still access to the islands is not without complications for any of the islands. Also these access channels rely very much on arrival by private cars, and thus no charter (mass) tourism has been developed, as no air access of importance has been developed as for example was the case on the Balearic Islands, with Mallorca's airport today being one of the busiest airports in Europe.

Thus, the markets for the islands have a clear element of proximity, resulting in a large home-market and other international markets dominated by immediate neighbouring countries.

All islands rely in their attraction attributes on nature assets, landscape and the quaint built environment as well as the local population's friendly welcome.

Also we have noticed a fairly high repeat visitation, something presumably to do with strong family bonds, a phenomenon not unknown in tourism in other places as well.¹²

The organisation of the tourism industry is similar on at least three of the islands; Bornholm, Gotland and Åland have a DMO engaging the tourism industry at a high level, including financial contributions to the DMO's work.

These characteristics illustrate some of the common features of the islands, but the list is by far comprehensive. Also, there of course do apply variations if looked closely into.

¹² A lot of Ireland's current success in tourism is for example attributed to the large number of Irish immigrants and their descendants now returning for visits.

Ongoing activities

In this section we will look into some concrete, sustainability related examples. Again, we do not attempt to give a comprehensive overview, but merely report impressions that we reckon can be of inspiration.

Bornholm

On Bornholm various initiatives within sustainable tourism development have appeared, some of these have disappeared again, as well. Amongst these have been hotels involved in the Green key scheme, some municipal beaches' participation in the Blue flag. Also, the Danish spatial planning system contributes a great deal to a sustainable development in the Danish regions (counties and municipalities) by regulating in accordance with the latest national findings on e.g. environmental protection. The latest initiative has been Rønne municipality's participation in the Destination 21 project as a pilot destination.

Destination 21

Destination 21 is a Danish initiative to agree upon criteria for sustainable tourism destinations in Denmark. It is a combination of a sustainability label (products) and a sustainability management system (processes). The development of the Destination 21 scheme has not yet been brought to an end, and has been delayed several times.¹³ The main reason for delay were difficulties in agreeing on criteria, so these could be made operational and are understandable and acceptable for the industry.

The scheme's drafted ideas on indicators and goals, have nevertheless acted as inspiration throughout the green paper. Again based on the decisions taken in Rio 1992 at the UN conference on environment and development, the Destination 21 scheme relates to the Agenda 21 for the tourism sector.

Since tourism has the capacity to destroy the very basis of its own existence, it does not only need qualified professional management, but also approval of the activities from the local community and compliance with international and national environmental standards. This is extremely important, when the topics are cultural or natural heritage and by that, close to the heart of the local identity.

In the Destination 21 scheme the aims that have been identified to be worked towards are:

1. Reduction of resource use and pollution.
2. Management and accessibility of natural and cultural heritage assets.
3. Local organisation and cooperation.
4. Development and promotion of new sustainable tourism products and more sustainability in existing ones.
5. Capacity building and human resource management.
6. Strengthen and make local culture and authenticity visible.
7. Create employment and added value on a sustainable basis.
8. Inform and spread knowledge on sustainable management.¹⁴

¹³ By the time of going to press, the Destination 21 office to the board had proposed at framework paper.

¹⁴ Andersen, Lene Feldthus, Presentation of Destination 21 at the BADLER project meeting, 23 May 2000 in Svaneke, Bornholm

To strive for sustainability is thus the key aspect in destination management, also when managing an attraction or a single business. In order to be able to do this, it is necessary to cooperate with the other stakeholders at the destination.

Since sustainability involves the three general aspects of environment, local community and business, it is almost impossible to work out a sustainable management programme in isolation. One needs to be able to discuss, influence and plan the measures together with other managers, with politicians, agencies and authorities locally as well as regionally. It may even be necessary to look for relevant knowledge at the national level.

Again from Synergy's report: *To date, take up across the tourism sector has been low and tourism certification has not matched the success achieved by schemes such as the Forest Stewardship Council in the forestry sector. One reason for this has been the apparent lack of concern for issues of sustainability in choice of holidays by consumers, despite recent research that indicates a growing willingness to pay for a more sustainable product. Currently, the strongest determining factors are price, health and safety.*¹⁵

Indicators

The table below gives an overview of the final aims and their indicators that were chosen by the Destination 21 secretariat in order to be able to determine whether the predicaments for Destination 21 are being fulfilled by those destinations that wish to apply for the Destination 21 label.¹⁶ The full explanation of what these indicators stand for can be found in the handbook, which is available from the secretariat or on the Internet.¹⁷

Aim	Indicator(s)
1. Ensure local organisation, joint strategy and cooperation	1. Joint vision and values 2. Tourism policy 3. Local Destination 21 participation 4. Local Agenda 21 cooperation 5. Annual Destination 21 report
2. Building of competence for a sustainable tourism development	1. Destination 21 competencies
3. Spread knowledge about Destination 21's ideas and practice	1. Procurement of Destination 21's ideas and practices 2. Destination 21 activities
4. Protect the destinations natural and cultural environmental values and ensure access to these	1. Tourism development and spatial planning 2. Natural areas quality 3. Water quality 4. Cultural values 5. Accessibility of natural and cultural environmental values

¹⁵ Op Cit

¹⁶ Destination 21 sekretariat, 2000, Manual for Destination 21 – en mærkningsordning for turismdestinationer med en bæredygtig udvikling

¹⁷ www.tuc.dk/d21-manual.pdf, however this manual is in Danish only. TUC (The Danish Tourism Development Centre) was closed down by the end of February 2001, a link to this manual can now be found on the Danish Tourist Board's website: www.branchenet.dt.dk .)

5. Local culture should be strengthened and rendered visible	<ol style="list-style-type: none"> 1. Local culture and authenticity 2. Tourism impact on the local area, especially the local community 3. International understanding 4. Attract local and national attention 5. Destination's international cooperation
6. Resource reduction and pollution	<ol style="list-style-type: none"> 1. Tourism businesses are environmentally labelled 2. Tourism businesses are environmentally conscious. 3. Environmental work at the local authority 4. Raw materials 5. Energy consumption 6. Water consumption 7. Chemicals (pesticides and cleaning agents) 8. Waste 9. Waste water 10. Emissions 11. Noise 12. Smell
7. Create employment and economic development for the local community	<ol style="list-style-type: none"> 1. The areas product offer and marketing. 2. The areas demand structure 3. Tourism generated economy 4. Tourism generated employment 5. Tourist experiences at the destination
8. Create a sustainable development of tourism products and business areas	<ol style="list-style-type: none"> 1. Sustainable tourism products and business areas 2. Sustainability account

It is evident from the above list that it is very difficult to determine the comprehensive parts of the sustainability criteria in a relatively short list.

Gotland

Gotland has been *ekokommun* since 1994 and has worked environmentally conscious since that time. This long time period has provided Gotland with an advantage, which amongst other things materializes in an increased awareness regarding environmental issues amongst the population in general and the tourism businesses in particular.

On the homepage of Gotland municipality it is stated that it was recognized already from the beginning, that the project needed to engage both private enterprises as well as households apart from the employees working at the municipality's administration. It was thus realised that the three most important issues to be addressed to get the project off the ground, had to be: a thorough basic training, as knowledge creates insight and involvement. Second, it was important to work out a good way to distribute information, something,

which turned out that giving the right information at the right time was more difficult than it seemed. Last, but most important was of course to create some good examples, which could get others to follow suit.¹⁸

Several initiatives have been taken:

- Blossoming roadsides
- Ekosafaris – knowledge tours for tourists and visitors to Gotland, interested in the environment (these were presented at the last conference in Saaremaa)
- Muramaris – environmentally friendly culture- and tourism business

You can read more about these initiatives on the homepage (see link below).¹⁸

Since 1999 the work with a clear environmental focus has been made permanent with establishment of *Ekogrupper* in *Gotlands kommun*. The aim is to create individual plans according to the joint Gotland plan, the eco-programme (*ekoprogrammet*).

Another example from Gotland

Apart from the above-mentioned work with ecological sustainability we would like to mention an example of economic sustainable co-operation on Gotland.

During our visit to Gotland we came across the cooperation between the ferry company Destination Gotland and two of Gotland's large tour operators. This cooperation has established a joint call center from which bookings are channeled to whichever operator is available first at any of these companies.

Traditionally one would expect that in a cooperation of this kind each company would frantically defend its own right to book as many customers as possible without regard to, whether they might lose a customer because of slow response.

In this example the focus is on serving as many customers as possible without looking into, who serves the customer and thus, hopefully, increase the total number of customers for everybody's benefit and long-term profit.

Öland

As we have mentioned earlier in this report, our visit to Öland was very brief. Thus, some of the experience and knowledge about Öland stems from earlier visits to the islands.

Also, a more in-depth analysis of Öland has been carried out by the project partner itself and will be presented separately.

Öland has probably the most vulnerable environment among the islands, combined with a massive influx of tourists during the short season. Many Swedes travel to Öland on their summer holiday, and long queues on the bridge from mainland Sweden to Öland tell their own story.

¹⁸ www.gotland.se/EKOKOM/Index.htm

Fresh water shortage and environmental impact on the somewhat exotic nature reserve Allvaret are important issues and have created awareness also among tourism businesses as well as public planners although there always could be a greater interest and understanding for the arising problems.

Example from Öland

As mentioned above, Öland's nature is very fragile because of very special geological conditions, as the soil layer, especially in the large area called *Allvaret* is very thin and therefore easily destroyed, if visitor flows are not managed properly.

Most of us have heard about the Swedish *Allemansrätten*, but many tourists do not have a clear idea what it comprises and often have an understanding that they can freely enter and use nature without taking care of it.

Several roads lead through the interesting area of the *Allvaret* known for its special flora (e.g. orchids) and only a few years ago people would stop anywhere on these roads and enter the landscape at any point without any concern about what damage might be done.

Instead of closing all access to the area, a system was developed where parking along the roadside was prohibited in general and several rest areas and parking spaces were established. These areas are set up in a way, so they only disturb the visual experience at a minimum; they offer toilet facilities as well as a brief introduction to the areas peculiarities.

This example shows a rather straightforward way to deal with a problem, which could easily have gone out of hand.

Åland

Åland has a unique culture influenced by its strong wish for independence and right to choose its official language etc. May be therefore it can be difficult at times to agree upon issues like waste management, as everybody is trying to defend their right to decide for themselves and thus, wishes to carry on as they have always done.

Example from Åland

When we visited Åland we visited Mariehamn's campsite *Gröna Udden* that was newly renovated for a large sum of money with a strong focus on environmentally friendly changes. Thus, the buildings were kept in colours that were close to the natural colours of the environment. Also, a new waste sorting and storage system had been introduced. As mentioned before, waste management and waste disposal is an important issue on Åland, which has yet to be solved. The campsite wanted to compost that part of the waste, which was eligible for composting. However, this had so far imposed a smell problem during the summer season. On the other hand, the waste station had to be close to the areas where people set up their tents or caravans, otherwise it was difficult to get people to use them. At the campsite they believed that they now had solved this problem, by digging containers below ground level and keep them tightly shut.

Another interesting point is that according to a study on the feasibility of a European Eco-label, *visitors of campsites appear to be more environmentally aware than visitors of hotels*.¹⁹ Therefore, there should be a good chance that the campsite thus can improve its competitiveness.

Rügen

This section on Rügen is based on Professor Landvogt's report, a work carried out for the county of Rügen in the course of the BEST project.²⁰

According to the inventory carried out on Rügen, it appeared that there were a large number of projects within tourism that focused on sustainability, however, compared to the number of tourism businesses on the island, the number of sustainability projects had to be considered relatively small.

It became evident that the effect was increased, if several businesses worked together in networks. This also had a positive effect on market opportunities. Also, most projects contributed to an increase in service quality.

On the other hand, marketing for sustainable tourism was fairly weak and communications about sustainability were practically non-existent. Thus, Rügen cannot pride itself for being renown as a sustainable tourism destination.

Those offerings focusing on sustainability contributed to a greater diversity in the general product offer and had a positive effect on prolonging the season.

Apart from the example given below, the report gives a very thorough inventory of projects and enterprises working in a sustainable manner.

Example from Rügen

In section "*Example from Öland*" we have seen an example from Öland using the establishment of parking spaces in order to channel visitor flows differently.

On Rügen we have come across a similar example, where visitors are led to use parking spaces some way away from some of the main attractions of the island (i.e. the chalk cliffs of *Königsstuhl* and the lighthouses at the most northerly point of the island, Cape Arkona). Here the visitors quite happily pay for the use of the parking space and then are led to either walk the distance to the attraction or use public transport. Also here, information about the area is accessible at the parking space, including information about how long the walk might take and how difficult the terrain might be.

In this way visitors receive more information about the area they are about to visit, and they are made conscious of the impact their visit to the area makes. Whether this has any influence on whether the actual number of visitors is reduced by these measures, however, we do not know.

¹⁹ CREM (Consultancy and Research for Environmental Management) and CH2MHILL, 2000, Feasibility and market study for a European Eco-label for tourist accommodations (FEMA-TOUR), Commissioned by the European Commission, DG ENV, Amsterdam

²⁰ Landvogt, Markus, 1999, Entwicklungsstand des nachhaltigen Tourismus auf Rügen, Landkreis Rügen and Fachhochschule Stralsund, Stralsund

SWOT-analysis

It can be seen from the above section "Project methodology", that it is difficult to conduct a SWOT-analysis for a whole destination, let alone a joint SWOT-analysis for all the islands, if not impossible. Making the attempt anyway is an experiment, trying to establish common traits and thus being able to identify common strategies.

The results presented in the table below are thus based on the author's data collection during the field trips, own knowledge and joint discussion of the two researchers.

<p>Strengths</p> <ul style="list-style-type: none"> • Overall joint strategy for the B7 islands • Established co-operational organisation in the B7 context • Strong repeat visitation • Well-established main holiday destinations • Many well-established events that attract large audiences/visitation • Increased focus on sustainability issues 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Main sustainability focus varies on the islands • Different stages of the product life cycle • Different organisational structures, although Bornholm, Gotland and Åland have a similar model for integrating the industry in the DMO's work • Industry structure with many small and micro-businesses • Seasonal fluctuation
<p>Opportunities</p> <ul style="list-style-type: none"> • Customer awareness on sustainability issues (increased interest in physical and psychological well-being) • Customers request greater variety in activities during the holiday • Short breaks can contribute to a longer season • Customers are increasingly interested in meeting the local population 	<p>Threats</p> <ul style="list-style-type: none"> • Cheap long-haul travel • Industry structure is unable to adapt to changed travel patterns (e.g. shorter holidays) • Enhanced accessibility can be a threat to the physical environment

Suggestions for future activities

In this section we give a list of possible actions to be taken in order to enhance sustainable tourism development on the B7 islands. Some of these measures have to be taken by the public sector other require the private sector to take action. We have tried to use this division although several actions may require public-private cooperation, in that case the activity is placed under the heading for that sector, which is required to take responsibility for that action is initiated.

All activities require an increase in communication between the sectors and within the sectors.

At this point we would like to stress we do not believe in the pronounced goal of joint tourism marketing for the seven islands. It may be possible to pursue this goal on a long-term basis. However, before this is possible, changes in the markets the islands focus on have to be made. Today, working on markets, which are defined by proximity, as explained above, the islands must regard each other as competitors. Of course, one could argue that any tourism destination is a competitor to any other tourism destination. However, it is not as simple as that, when it comes to the seven Baltic islands.

Actually, as each island has such a large share of tourists from the home market and as they look at the marketplace of the immediate neighbouring countries for an increase in visitation, this automatically means they are looking at, at least similar, if not the same market segments. Having a product offering at each island, which resembles very much the other islands' product offering, they must be regarded as competitors. E.g., for Bornholm the second largest market is the German market. For Rügen the largest portion of visitors comes from Germany. A large number of German tourists visiting Bornholm use the ferry from Rügen to Bornholm on their trip. It is obvious that Bornholm tourism professionals fear that, in case of joint marketing, the German tourists would stay on Rügen and save the trip to Bornholm.

We are not saying that this fear is a rational fear, however, it is quite clear that this fear exists in some places and has to be worked on. Nevertheless, it is our opinion that there are more important issues to be worked upon before this issue is taken up.

The view of competition between the islands has been supported by tourism officials on the island of Bornholm, on the other hand there have been voiced strong opinions from Gotland, that this is an important goal, and it is therefore necessary that this matter should be discussed further.

Activity: Courses for tourism professionals.

Motivation: There is especially a need for marketing courses, as too many still equal marketing with just advertising and sales. But marketing is much more than that, it is a *particular set of corporate attitudes toward the conduct of operations involving the public as targeted customers or users*, it is also *the way in which an organization is conducted by its owners and managers*.²¹

Activity: Allocation of funds for research and collection of statistics on all islands.

Motivation: The survey conducted by the lead partner and presented at the last conference showed amongst other things a need for more structured collection of data on tourism on the islands. The data available was of questionable validity for most of the islands. Direct comparisons are not possible at this stage as principles of data collection vary widely. In order to encourage exchange of views on tourism between the islands' DMO's comparable data would be of great advantage.

Activity: Initiation of regional brands like culinary heritage.

Motivation: The introduction of the culinary heritage plaque has appeared to be successful on several of the islands. It has achieved customer awareness and is regarded as a quality mark for a restaurant. Also, this project nicely combines local produce with regional heritage, and is thus in accordance with the sustainability approach. Similar brands could for example be established for cultural heritage attractions, architecture, and arts and crafts design or other local products that are sold to tourists. Also the culinary heritage brand could be extended to focus on local food produce sold in local shops.

Activity: Exchange on spatial planning issues.

Motivation: It has become evident that one of the important tools for planning for sustainable development in general (and this includes tourism) lies in the hands of the public spatial planning departments. At this level cooperation between the islands is a fine opportunity, both as regards structure and organisation of processes, as well as exchange of national standards.

Activity: Support of networks.

Motivation: It is important that the public sector is prepared to support emerging as well as existing networks both morally and financially. Networks amongst the industry are the foundation for all the work to be done and to enhance the destinations sustainability through increased communication.

²¹ Middleton, Victor T.C., 1998, Sustainable Tourism: A Marketing Perspective, Butterworth-Heinemann Oxford

Private sector action required

The number of activities directly related to the private sector is lower than in the previous section, as the public sector plays an important role in the overall development policy.

Additionally, the public sector has the ability to strengthen cooperation between the islands, whereas the private sector for several reasons (compare argumentation above) may be holding back in direct cross-island cooperation.

Activity: Increased cooperation between players of tourism at destination level.

Motivation: An important prerequisite for survival in the marketplace is to achieve marketing excellence and the ability to forge relationships for cooperation with other destination stakeholders.²² It is important to notice that this is at destination level and not between the different destinations. There are several reasons why this is unrealistic, at least at this stage: the cooperation between stakeholders is currently still at a weak stage, if non-existent; however much it would be interesting to be able to cooperate on marketing across destination boundaries, the seven islands remain competitors to each other, what is a home market for one island is often an important foreign market for the other. Also the islands similarity in the product offer stresses this problem.

Activity: Development of a broader product offer

Motivation: Research has shown that the tourist of today has turned into a demanding chameleon, who changes interests and thus needs from day to day throughout the holiday – one day it is sporting events, the next day it is own activities, the third day relaxation and so forth.²³ This calls for a large variety in the product offer in order to be able to fulfill the customers' needs and wants.

²² Op cit

²³ Turismens Udviklings Center, 2000, Den tyske udfordring, Analyseresultater og anbefalinger

6 Conclusion

Various studies have shown that environmental aspects still play a less important role when tourists make their buying decision than it has been hoped for. The main focus is on specific aspects as natural characteristics, rural areas and the presence of water and forests as well as aspects related to air and water quality etc. However in some countries, e.g. Germany, research has shown that around 30% of the population these days will not accept environmentally damaging products.

Work carried out at supra-national level shows that schemes agreed upon at for example European level, are regarded as more credible than national, let alone local level. Credibility of a scheme is of great importance if it is to have any effect in relation to improvement of competitiveness. The more widely a scheme is recognized, preferably combined with third party auditing, the more likely it is for the scheme to be successful in communicating with potential customers.

The most important issue for all participants is to connect the development of the tourism industry with development in general and to be able to rise above mere ecological sustainability and thus put increased focus on socio-cultural as well as economic sustainability.

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