Survey of young person’s perception and ideas on Baltic Sea Region tourism products

Lise Lyck
Survey of young person’s perception and ideas on Baltic Sea Region tourism products
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Preface

This survey relates to the EU project AGORA 2.0 work package 4 item c) a contest on innovative heritage product ideas among students/universities.

The survey should have been carries out by another partner, but it was not done. It was therefore decided on the last meeting and seminar in the AGORA project in Poland in November 2012, which TCM/CBS should undertake the survey and fulfill the AGORA 2.0 requirements.

On this background a survey among students of tourism, hospitality and service management at the Copenhagen Business School was carried out.

The students include students from many countries, and the studies are taught in English.

This publication presents the survey and the results of the survey.

Lise Lyck
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1. Introduction

The survey includes a population of 101 students, including 66 percent female and 34 percent male.

The survey took place in an international student environment with most persons being in their 20s (61 percent 15-24 years old, 33 percent 25-44 years old).

The population was mainly students born in Denmark, but many other nationalities were included, see table 1. In other words, the student population was international.

Table 1 – Population by nationality

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>62</td>
</tr>
<tr>
<td>Brazil</td>
<td>1</td>
</tr>
<tr>
<td>Italy</td>
<td>2</td>
</tr>
<tr>
<td>USA</td>
<td>4</td>
</tr>
<tr>
<td>Germany</td>
<td>2</td>
</tr>
<tr>
<td>Norway</td>
<td>6</td>
</tr>
<tr>
<td>France</td>
<td>1</td>
</tr>
<tr>
<td>Poland</td>
<td>2</td>
</tr>
<tr>
<td>UK</td>
<td>1</td>
</tr>
<tr>
<td>Russia</td>
<td>1</td>
</tr>
<tr>
<td>Rumania</td>
<td>2</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>1</td>
</tr>
<tr>
<td>Singapore</td>
<td>1</td>
</tr>
<tr>
<td>Spain</td>
<td>1</td>
</tr>
<tr>
<td>Iceland</td>
<td>2</td>
</tr>
<tr>
<td>China</td>
<td>4</td>
</tr>
<tr>
<td>Lithuania</td>
<td>5</td>
</tr>
<tr>
<td>Portugal</td>
<td>1</td>
</tr>
<tr>
<td>Vietnam</td>
<td>1</td>
</tr>
<tr>
<td>Latvia</td>
<td>1</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>101</strong></td>
</tr>
</tbody>
</table>
2. Familiarity with the Baltic Sea Countries

All students had knowledge on at least one of the Baltic Sea countries, but many had knowledge of more than one of the Baltic Sea countries. The knowledge has its origin in some of the students being born in a Baltic Sea country. Furthermore, many had experiences from visiting one or more of the Baltic Sea countries. It is seen from table 2, that all the Baltic Sea Countries have been visited by at least two students. There is an overweight of students with personal knowledge on Denmark, Germany, Sweden and Norway. It is also seen that the eastern part of the Baltic Sea countries has only been visited to a minor degree.

Table 2 – The Baltic countries visited by the population

<table>
<thead>
<tr>
<th>Country</th>
<th>Students who have visited the country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark*</td>
<td>101</td>
</tr>
<tr>
<td>Norway</td>
<td>75</td>
</tr>
<tr>
<td>Sweden</td>
<td>90</td>
</tr>
<tr>
<td>Finland</td>
<td>16</td>
</tr>
<tr>
<td>Latvia</td>
<td>12</td>
</tr>
<tr>
<td>Estonia</td>
<td>11</td>
</tr>
<tr>
<td>Lithuania</td>
<td>12</td>
</tr>
<tr>
<td>Poland</td>
<td>39</td>
</tr>
<tr>
<td>Germany</td>
<td>99</td>
</tr>
<tr>
<td>Russia</td>
<td>2</td>
</tr>
</tbody>
</table>

*Population 101. All are or have been in Denmark
3. Holiday preferences

From question 6 in the questionnaire (questionnaire, see enclosure 1) it is seen that as many as 90 out of 101 prefer to spend their holidays outside the Baltic Sea Region countries. It demonstrates clearly that the Baltic Sea countries have no strong attraction value as a holiday destination among young students. They prefer to go to other destinations outside the Baltic Sea Region (USA, Asia and/or to countries with a warmer climate). The students who spend their holidays in the Baltic Sea countries prefer to have their holiday in their own country.

These results are in line with a small pilot study among the partners, which was carried out at one of the seminars that were included in the Baltic Sea partner meetings.

Asked which attraction in the Baltic Sea countries the students found most interesting the answers presented in overview 1 were given.

Overview 1 – Preferred attractions in the Baltic Sea countries among the population

1. Copenhagen
2. Berlin, Germany. Historic buildings
3. Berlin in Germany - it is such an interesting city that you can go back to again and again
4. Atmosphere and cultural sights, for instance: - Old city centers - Castles - Churches
5. Germany! I have visited Germany - especially Berlin - several times, and I enjoy the german culture.
6. The Open'er Festival in Gdynia is in my opinion one of the best festivals to visit in the Baltic Sea Region when comparing the quality of artists, accessability (closeness to Gdansk Airport and good train connections between Gdynia, Sopot & Gdansk), accommodation (many different hostels to choose between) and the price level. Apart from that, Gdynia is located close to Gdansk and Sopot which are very interesting cities to visit for 1-day excursions.

7. Historic sightseeing... I love to know about other countries, their culture, cuisine...Stragle to break through and show their personalities.
I think I like most of the places in Denmark, Norway, and Sweden. One reason is that all three countries are beautiful with natural views and a relaxed culture; another is that people in these countries are very kind, friendly, and willing to help others.

Poland and Finland. I have family and friends in both countries. Also Poland has some nice beaches and, travelling more inland, nice landscape and interesting history.

Oslo, it is one of my favorite places.

Little mermaid because it has a lot of FUN history to it due to HC Andersen's stories. Nice atmosphere too in the park by the water.

I don't know

Not really any tourist attractions. But Berlin and the skiing areas in Norway and Sweden.

I do not have much knowledge about the Baltic Sea countries, but since I have not been in many of the countries, I find it very interesting to get to know more about what they can "offer". All the countries except from Denmark, Norway, Sweden and Germany I find very interesting because they are new to me, and they wake my curiosity.

I don't know

I travelled Estonia, Latvia and Lithuania once - that was a very nice combination. Beautiful cities.

I am not sure that I can limit myself to only one attraction - I find all the major cities in Baltic Sea countries interesting.

Polen, due to its rich history during ww2,

I really like the vast forests/nature of Sweden.

Norway, because of the gorgeous nature

Berlin is most interesting, as the city has a beautiful culture, loads of things to do and the people there are wonderful

Warszawa.. It has a combination of both the old precommunist and the communist buildings. It's an incredible mix and with an amazing town - it's a lovely city.

Berlin Wall,

I find it interesting to go on shorter skitrip to Sweden every winter.
Berlin tower
Attraction parks, because they are awesome
Legoland
Finland because I like spa and nordic sauna
I would like to go and experience the Baltic Sea countries culture, but honestly I have never spent time on travelling and looking for attractions there.
Aurora
Berlin
concentration camps
Don't really know
I like to go skiing in Norway because of the beautiful landscape and the many good areas for cross country skiing. I like being in Germany, and I have visited Berlin, Hamburg and Munich a lot of times. It is cheaper than DK and it is good holiday destinations close to Denmark I would like to visit Estonia, which I have heard should be beautiful.
Parnu - beautiful little town, great SPA offer
I have personal interest in Norway and Sweden because I have family and friends living in both countries (I have lived in Norway for four years and my father is a norwegian citizen)
Riga
Berlin as a city. It is beautiful and have a wonderful youthful energy.
Berlin Stockholm
Krakow in Poland, beautiful place
The Lithuanian Maritime Museum, Aquarium, Dolphinarium
aurora borealis (never seen it though)... shows how beautiful the nature is
I don't know
North Cape, Norway. I like it owing to its natural nature and unique vieswight that can not be found elsewhere.
Aurora & Polar day. The first is really beautiful and rare to see, the second it just really interesting, really unique existence, really different.

the culture is similar to ours , and that makes it easy to travel around in these countries . the attraction which I find interesting is historical attractions, because it can tell a lot about our story aswell

the remains, buildings, historical places etc. after world war 2

The baltic countries and Kalingrad. That is the countries and culture I know the least about.

Norway - beautiful landscape and nice people

Would love to go to Lithuania, since I have a couple of friends from there, and also to take a look at their culture. Plus I know that basketball is a big sport over there, so it would be great to take a look at that as well.

Norwegian fjords because the nature is very beautiful

I like different things from different countries but in general I like the picturesque landscape, nature, tranquility and the good examples of art noveau architecture like in Riga.

Norwegian nature - beautiful Copenhagen - amazing city

Tivoli in Copenhagen Denmark . I find it a friendly place that you can enjoy with your friends and family. Its also a place with culture

I think the Baltic Sea countries have a different and spectacular landscape that can not be found in other countries in the EU. Further due to the fact that tourism might not be that extrem yet especially backpacking trips could be a great opportunity to really get to know the people in these countries

Finland

Midnightsun at the North capp

The cultural heritage

East Germany to learn its history and they have great museums as well.


Tivoli since the location and the theme of the park fascinates me.

I really like the incredibly vast areas of nature with next to no civilization whatsoever, the intact countryside and its sanctity.
To visit and see the history of Berlin

I find Karneval and October fest in Germany interesting because it is a good way to get to know the German culture. Also, I like the Lapland region, because it is so beautiful and different from what we have here in Denmark. It is a good way to experience the nature.

Of the places I have visited: The Oslo harbour is very nice. In Germany Berlin is a lovely city, with many nice attractions and history, like the wall and Jewish museum.

The wall in Berlin, as it has a history, which I know a lot about. I have been in Berlin several times.

architecture, food, culture

Riga

The fiords in Norway, because of their beauty.

What is left of the Berlin Mauer, because of its history and the symbolic meaning to it

Capital cities and landscapes

I have never had the opportunity to go to the Baltic countries, so there is a lot of places I would like to visit! I would like to go to the old city in Riga, Latvia. They also have a lot of spa's there, which I never been to before. I would also like to visit Helsinki, they say it is a very idyllic city.

The Fjäll in Sweden/ Norway/ Finland because of its untouched nature

Skiing + nature/ mountains --> Norway

Finland because the nature and culture sound interesting

Finland because the nature and culture sound interesting

Finland because the nature and culture sound interesting

Ski attractions, Norway and Sweden Malmö - nic city

landscapes, capital cities.

The wilderness of the Baltic countries and the vast nature of the area.

I have never thought about it really since I have had no intention going here.
Overview 1 tells that it is a mosaic with no really fixed pattern. It makes it clear that there is no Baltic Sea country focus, but some national attractions are mentioned. All in all no strong coherent Baltic Sea Region appeal exist among the students, but strong preferences to certain national attractions.
Overview 1 demonstrates that preferences are much split and not pointing at a Baltic Dimension. In general the attractions account capitals/big cities and some nature attractions, i.e. a picture that is normally found when people are asked about destinations and have no strong preferences.
4. Ideas and thoughts on Baltic Sea Region attractions

Question 9 in the questionnaire asks for ideas for tourism development products in the Baltic Sea countries. Only a minor part of the population has – as expected – answered the question. All the answers are presented in the overview 2.

Overview 2 – Ideas for a common Baltic attraction or an attraction that could be developed into a tourism product

1. To introduce a national cuisine. It is fun, enjoyable. And people tend to miss those experiences. Recently I talked to people who visited Baltic countries and they talked about architecture and how much they would like to repeat a tasting tour of national dishes.

2. Maybe a little bit boring; but focusing on the nature, national clothing and food and make this exciting and creative in a new way.

3. I do not have an idea, but I think the countries are very different and it is therefore difficult to come with something to cover all the countries!

4. Take the Little Mermaid in Denmark as an example. Personally, I think this attraction can be developed much better beyond being boring and dull. Imagine – you are a foreigner, traveling thousands of kilometers to visit famous little mermaid. However, what you can see is merely a statue sitting there, silent and alone, and what you can do is just to take a picture of her or with her, nothing more, that is it. Would you regret coming her? Won’t you feel somewhat disappointed since you may have expected more than a statue? Will you recommend it to your friends, your family members, or your colleagues when you are back to your own country? The main problem with this attraction is that: it is simply a static statue, no living meaning and experience is given to it. People won’t be impressed by a few of pictures with the mermaid, regardless how nice they are. One method to improve this attraction is to give meaning to it. The main reason Little Mermaid became famous and well-known all over the world is due to Hans Christian Andersen story, and this is where we should start with. Firstly, make it available for people recalling and experiencing the beautiful story again. For instance, a show room/projection room with a brief story telling; or a glass passage decorated the same as a the Mermaid Kingdom with different plots. Secondly, this can be expanded to involve visitors to participate. We can borrow the idea/theme from Sentosa Park in Singapore or Disney Park.
Activities such as laser projection in the evening or collective dancing (actors as well as visitors) will enhance travellers' experience. The more visitors are involved, the better their experience might be. Another method, though still requiring some resort development and investment as described in the first method, is through film making to promote it—just like James Bond Islands in Thailand became famous because of James Bond film, Fiordland National Park in New Zealand because of The King of Rings, and Durham Cathedral in Harry Potter. Those places became well-known overnight and started to attract millions of visitors after the release of the films. Sure there are other methods too. But I will just stop here for now. Hope this helps, the same methods can actually be applied for all different attractions.

5 I think people are already doing it for Aurora tourism, but for me, seems like there is not a promotion of Finland or Norway saying that you should come here for the winter or summer because we have polar day or polar night. Maybe not the night, but I polar day sounds like an interesting idea for me to go there and live a week on my vacation. I can choose to sleep anytime inside and wake up anytime in a day and there will always be sun, so I get to choose when to do what I want.

6 Since the countries differ in so many points, the focus should probably be on the many different traditions that it is possible to come by if visiting these nations. It is very old countries and therefore a lot of history here as well. Furthermore there could be put focus on the coziness (hygge) in Danish. At least the places I have been, there have been a lot of nice cafes and bars where it is easy to go in and have a good time. But the main point should be in the traditions and history I believe.

7 I think a general idea for the 10 Baltic regions is too vague because the Scandinavian countries are too different to Germany and the other countries. Even calling them the “10 Baltic countries” sounds strange because normally you refer to only 3 Baltic countries: Estonia, Latvia and Lithuania. If the intention is to promote this group of countries in Asian or Brick markets, I think they should highlight the particular tourist attractions of each region and not just a common global idea. On the other hand, if you look for a common theme I think that their landscape, nature and tranquility with beautiful green and blossom springs or colourful autumns is an attraction that can be even enjoyed in the cities.

8 Baltic countries, not what it used to be… Simply because due to the fact that somehow especially eastern countries still have a bad image attached to it. Even though the iron curtain fall long time ago and people are getting more and more alike people especially in Germany still do not perceive it as a major attractive travel destination. Rather are their images of - still - poverty and theft attached to it. Even though that might be stereotyped a slogan that targets these thoughts but convinces people from the opposite could be good. Further people should be educated that the Baltic countries - excluding the Scandinavian - are not only places to go for having a good time with cheap beer.

9 I know that many cruises travel between these countries - so I guess cruise stop overs could be a similar theme for seeing these countries.
Invest more money for developing of tourism in Latvia, Estonia, Lithuania.

Amber could be used as such a theme. The tourism product could be a tourist route linking places connected historically with exploiting amber and creation of amber jewellery, art etc. On the route, there could be whole cities (e.g. Gdansk in Poland) and particular places in these cities (museums, churches). The tourist product could include crafts-workshops e.g. learning to make simple amber jewellery and lessons about amber, its origin, different colors & ways of exploitation.

Since the price level in some baltic countries are lower then in scandinavia, they could attract more health and leisure travelers for spa and health treatments. It is a growing market for that. I would think that winter Finland is a beautiful place to go for tourists that love nature, they can go dog sleighing, visit Santa Clause Village in Lapland, and they have a lot of family attractions like the Mummiland (based on the children's television series).

My idea is wilderness travels for youngsters wanting to take a trip back to the stoneage. People go backpacking in australia, south america. Why not baltic wilderness? A lot of youngster go backpacking to asia, pacific or american countries. I do not personally have research that can give information about there motivations for travels to these destinations. Personally i believe that people travel to these places to experience new culture and to experience new things that are far away from their suburban or metropolitan lifestyle. I think that many of the baltic countries can offer a tourism product that in many aspects can substitutes the tourism product of the more exotic countries. In denmark we do not have much wilderness. I personally come from the suburbs and the most dangerous animal i have seen is a big dog. I can imagine that a lot of youngsters feel the same, and therefor go to australia to see alligators, to africa to see lions or to asia and see elephants. Many baltic countries have also got unique wildlife, such as wild boars and mooses. I believe there is market for backpacking in northern europe, branding it as having the same level of mystery as some of the more exotic countries. Wildlife hunting in the forests of norway is one attraction. Camping, fishing canoeing and cooking your own dinner is another. Creating hostels with beautiful settings and a loose lifestyle in the wilderness is another. Instead of taking a diver course, people would be comming home from the baltic countries with hunting diploma's and hunting trophies. People would come there to relive the lifestyle of the stoneage. I can imagine that the baltic countries can become a new, an exciting and cheap substitute to backpacking in asia, america or africa.

I work in a hotel and I know that Asian tourists often come to Denmark as a part of their 'Scandinavian Tour'. So to include Eastern European countries with the uniqueness of Scandinavia seems like a wrong mix of messages. If they wish to explore the Eastern European, they would most likely prefer to do 'Russian-Eastern European Tour'

Potentially hiking tours in some of the countries. Bike tours through the countries.
To summarise, some of the ideas from overview 2 could maybe be further developed. It goes for:

- Architecture in the Baltic countries
- Lifestyle in the Baltic countries
- Food in the Baltic countries
- Improved use of the existing national attractions
- More actively use of seasonality
- Reconsider and evaluate if the idea of creating transnational Baltic Sea attractions is strong enough as concept for tourism product development
- Amber should have a stronger position both as a tourist route and as a cultural concept for the Baltic Sea countries
- Focus on creation and development of cruises in the Baltic Sea
- Spa and wellness tourism centred on Nordic and European bathing traditions
- Wilderness tourism and back to nature concepts
- Hunt tourism
- Combinations of Baltic Sea nature and culture as tourism products

It is worth to notice that almost all proposals are closely connected to on-going tourism activities, but also that most proposals ad higher degree of participation to the products. It is also worth to notice, that lifestyle and behaviour have a more pronounced position in relation to development of tourism products.
5. Conclusion

The survey included an international student population, all with experiences from the Baltic Sea countries. It is a clear finding that most of the students prefer to spend their holiday outside the Baltic Sea countries. It tells that the Baltic Sea countries are not found interesting enough as holiday destinations.

The survey also demonstrates that the students when asked where they prefer to spend their holiday inside the Baltic Sea Region do not focus on specific attractions covering the preferences of the whole population. Instead they focus on national attractions and on capitals/big cities and nature as it is always found when people are asked about destinations for holiday that do not possess a strong focus or brand.

The question on ideas for new tourist products in the Baltic Sea Region mainly build on existing products but with a bigger element of participation and lifestyle. Some responders also find, that the idea of a common Baltic Sea Region tourism development should reconsidered based on too little demand interest.

The survey as such demonstrates that there still is a long way to go if Baltic Sea Region tourist attractions should be created successfully.
Enclosure 1 – The questionnaire

Question 1
What are your personal email addresses?

Question 2
What is your gender?

Question 3
What is your age?

Question 4
What is your nationality?

Question 5
Please give information about which of the following 10 Baltic countries you have visited:

- Finland
- Estonia
- Latvia
- Lithuania
- Kaliningrad
- Poland
- Germany
- Denmark
- Norway
- Sweden

Question 6
When you have holidays, you prefer to go travelling:

- Inside the Baltic Sea countries
- Outside the Baltic Sea countries
Question 7

If your answer is “inside the Baltic Sea countries”, please specify which country/countries have you visited:

- Finland
- Estonia
- Latvia
- Lithuania
- Kaliningrad
- Poland
- Germany
- Denmark
- Norway
- Sweden

Question 8

Please state which attraction in the Baltic Sea countries you find most interesting and why

Question 9

Do you have an idea for a common Baltic attraction or an attraction theme that can possibly be developed as a tourism product?

Question 10

If yes, please elaborate on your idea/theme (about 1 to 2 pages)
Enclosure 2 – Survey: Pilot study of tourism destination preferences among AGORA 2.0 participants

Study: 20 participants (not a valid sample, but a good pilot size)

Participation: 55 % women and 45 % men, 7 different countries (slight overweight of Germans but otherwise rather equally spread of persons from the BSR)

Main conclusion: “The customer is always right.”

Answers from Yellow note:

Where in the world would you like to have your vacation?
Top 2:
1. USA (25 %)
2. Spread out on 15 different countries primarily from Europe

Where in the EU would you like to have your vacation?
Top 3:
1. Norway (20 %)
2. Sweden (15 %)
3. Spain (15 %)

Where in the BSR would you like to have your vacation?
Top 3:
1. Sweden (25 %)
2. Finland (15 %)
3. Poland (10 %)

Where in your own country would you like to have your vacation?
Participant had to choose one location from own country. Since most participants were German, Rugen had 25 % of votes, while the rest was spread on other local destinations from all countries.

Answers from Pink note:

Where did you have your most recent long vacation?
Top 3:
1. USA (20 %)
2. Greece (15 %)
3. Germany (10 %)
Where did you have your most recent short vacation (2-4 days)?
Top 3:
1. Germany (15%)
2. European capitals
3. New York

Answers from the Blue note:
Where will be having your vacation this year?
Top 2:
1. Spain (20%)
2. European countries

Are you having both a long and a short vacation this?
95% yes,
5% no.

Answers from the Orange note:
Where did you have your best vacation?
Top 3:
1. USA (20%)
2. Russia (10%)
3. Countries in Asia, Africa and Europe

Why was this the best vacation?
Top reasons: family, good service, nice local people and atmosphere, honeymoon, good infrastructure, landscape and nature, and sun.

Conclusion:
There might be a difference in what people want and what they actually do. Nevertheless, it is important – for product development to be successful – to listen to your customers. Ultimately, they are the ones who visit, revisit and recommend your attraction to others!

Also, the pilot study indicates some of the things that we – as tourist experts AND as civil persons – find intriguing. What is it that these places in the world, the EU, the BSR or your own country offer specifically? Of course, management at an attraction cannot do too much about the weather or location of the attraction – but it is worthwhile to consider e.g. transportation opportunities, possibilities for families to have fun together and the fact that, naturally, service at the attraction needs to be pleasant. Furthermore, for short vacations it
seems as if many want to visit capitals so why not offer a one-day-excursion out of the city? Here, 95 % of voters stated that they are going on both long and short vacations – so the potential is great. Also, there might other possibilities for cooperation (neighboring attractions, local town and its tourist operators etc.). Just to mention a few of the things to keep in mind when you are looking into product development at your attraction.

It is extremely important to know what your customers/visitors really want. In fact, there is often a discrepancy between what you think you offer and what the customer perceive/think of your attraction. Please keep this in mind when you are doing product developments in the coming months. Have a look at what the statistics from the questionnaires say or ask visitors at your attraction yourself – before you develop your ideas!