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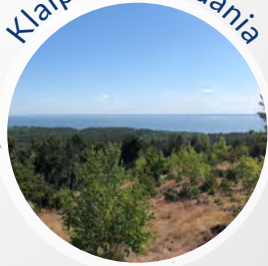


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Kristina Henriksson, Päivi Mantere & al.

MOTION Scenario Book



Co-funded by the Erasmus+ Programme of the European Union

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1 Introduction to Scenario Book

Kristina Henriksson & Päivi Mantere

THIS PUBLICATION IS created by the partners of the project MOTION (FROM OVERTOURISM TO INNOVATING SUSTAINABLE SOLUTIONS IN THE EU). The project is funded by the Finnish National Agency of the EU for the years 2020–2023. The partners are Laurea University of Applied Sciences in Finland (coordinator), Klaipeda University in Lithuania, Kiel University of Applied Sciences in Germany, Nicolaus Copernicus University in Poland, University of Granada in Spain, and the Municipality of Monachil in Spain. The project has worked on developing sustainable solutions to make travel more sustainable and at the same time combat overtourism. The project began in the most serious conditions of COVID-19 pandemic, and the partners have nevertheless been able to proceed with all the activities designed for a world without travel restrictions or pandemics of any kind. The partners received a lot of support from the Finnish National Agency in the months of the pandemic to be able to carry out the challenging work of developing tourism when there was no tourism in the works. The partners wish to thank the Finnish National Agency for the invaluable help and support received. The project also publishes two other publications, --the second one is a Case Studies publication published as well by Laurea UAS. The third one is the Handbook published by the University of Granada. All three publications provide information and guidance to SMEs, actors and students working in the tourism industry.

This Scenario Book illustrates the scenario work that project MOTION conducted in five European regions. These regions are Rovaniemi in Finnish Lapland, The Curonian Spit in Lithuania, Fehmarn and Kiel in Germany, Toruń in Poland, and Granada and Monachil in Spain. The project focused on issues caused by overtourism while meeting the priority of environmental and climate goals. The scenario work is explained more in depth in the MOTION Handbook, which will be available as well on the project website. Scenario work was implemented during the project to find out and visualize potential futures for the regions and SMEs involved in the process run by the partners. To put it clearly, scenario working includes mapping alternative

futures and identifying factors and development paths leading to different future outcomes. The action scenario approach also incorporates the evaluation of the significance of the scenarios for the user. Finally, based on the evaluation, necessary actions are suggested. MOTION organized Futures workshops for the local SMEs in each location where the Intensive Study Programs (ISP) had earlier been carried out. Intensive Study Programs were week-long events during which students, teachers, and businesses collaborated on creating sustainable solutions for tourism. During the scenario workshops different materials were created some of which are presented in this collection of scenarios.

Scenario work has aimed to improve both the knowledge and skills of topics related and included in Futures Studies. Information and data generated as a part of work in the field of Futures Studies enables organizations to improve their competitiveness in the tourism business. Even more important, scenario work was used to offer training to employees and entrepreneurs of the local businesses to be future-oriented, to enhance their Futures Thinking competences. The objective of the work has been to create more sustainable tourism services and solutions that also respond to overtourism issues.

Next follows some theoretical content on scenario work. Thereafter, the way MOTION approached to carry out the work in question is explained.

MORE ON SCENARIO WORK

Creating visions is essential to scenario work (Gaziulusoy 2010, 49). According to Delsooz et al. (2022,4), scenario workshops are beneficial for improving the participants' competencies. It is crucial to utilize diverse scenarios and approaches while developing sustainability issues (Gaziulusoy 2010, 52). Scenario work is a fundamental activity in business development, and it provides competitive advantage for an organization to manage future encounters.

Furthermore, scenario work should not neglect the travelers' points of view, as they apply their previous mental patterns that affect their attitude towards tourism, also from the sustainability perspective (Parviznejad & Akhavan 2021, 13). Scenarios describe the actions of the users, which can provide a path for stakeholders to understand the expectations of future users (McCabe et al. 2012, 43). When customers perceive the tourism business as sustainable, it positively affects their experiences, buying activities, and loyalty (Santos et al. 2022, 20).

During the project MOTION, workshops were utilized as collaborative methods to Futures visioning. Workshops are usually events that last from a couple of hours to a full workday. The involvement of various stakeholders broadens the understanding of designing and enhances the equal influence of the actors. A wide range of participatory methods can be utilized in these collaborative workshops (Chase et al. 2012, 481).

Van Vliet et al. (2012, 747) present the dilemma between structure and creativity in the organizing of workshops. When planning the scenario workshops for stakeholders, one should consider the dilemma. Furthermore, scenario workshops can be evaluated through the following parameters: type of tool used for the visioning exercise, length of the workshop, diversity of a toolbox, and tools used in the workshop. The quality of the outcomes and results vary according to the tool used. Contrary, the duration of the workshop, and how many tools were in use less importantly correlated with the results. (van Vliet et al. 2012, 753–754.)

Initially, it is crucial to identify the essential stakeholders to be involved. Chase et al. (2012, 488) propose instructions on successfully enabling stakeholder engagement. There is a need for inclusiveness with this

consideration. Furthermore, it is necessary to ensure equal treatment and participation of the actors. Utilizing diverse techniques to engage the stakeholders and encourage them to contribute will also be beneficial.

Even though multi-stakeholder co-creation is beneficial, also some challenges in stakeholder collaboration may occur. There might be some resistance among the different stakeholders, and they might experience inequity. Stakeholders can have problematic relationships with each other, for example, in the form of communication issues. Moreover, there is often a need for more collaboration resources in the form of money or time. (Chase et al. 2012, 487–488.)

Even further, Nowacki et al. (2018, 566) highlight clear communication among the stakeholders, which requires relevant channels for communication. When aiming for a sustainable future, all the actors should be alert to different kinds of scenarios and act accordingly together with the stakeholders. Preparedness requires process orientation and illustrates a more comprehensive understanding, knowledge sharing, and democratization. Further, this approach also allows for applying foresight and readiness to other regions and industries. (Postma et al. 2017, 20.)

Next, the way the project MOTION carried out scenario work is described.

THE PATH TO MOTION SCENARIO WORK

MOTION organized a short-term staff training with a set of workshops where project experts studied Futures Design Thinking, its methods, how to apply them into practice, and how to approach the next steps in the project with these methods. The short-term staff training was necessary to be implemented since the foresight and futures aspect was integrated into all tasks of the project. The added value of the training was on how the contents and results were to be utilized throughout the whole project.

When orchestrating the workshops as a part of the project, MOTION experts needed to carefully consider how to respond to the local needs by choosing optimal methods and tools, as well as the duration of the collaboration. In addition, it was necessary to assess well in advance how to build such a combination of stakeholders that would be most beneficial. For example, representatives from municipalities or destination management offices together with local businesses and students and staff from HEIs were invited to co-creative workshops. When combining people from different organizations, representing diverse levels of management, it is important to pay attention to power issues to ensure functional communication. The role of the local organizer was crucial in the planning of collaboration with diverse stakeholders.

As a part of project MOTION, students at the partner universities formed multidisciplinary and intercultural teams and generated sustainable and Futures-oriented solutions for local operators during the ISPs. The process followed the scenario work logic which was also adapted in the project, however, in a modified and lightened version to be suitable for students not being professional Futures visioners.

After the ISPs, the partners developed the results from the ISPs further. They also collected different materials and data related to trends, weak signals, and wild cards to be able to organize futures workshops for the local SMEs in each ISP location. The preparing and organizing of the scenario workshops as well as creating the training material required good planning and co-operation with local organizations in order to respond to the local needs.

During the workshops, different materials were created, and after the workshops the materials were even further developed into regional scenario books that were finalized after consultation with local actors. These workshops also provided some recommendations for each actor participating. These regional scenario books are compiled into this publication.

This Scenario Book continues next with the regional scenario findings in each location run by the partners. Each partner describes the process implemented as well as the generated results from the workshop. These results offer the reader insight into the various futures possibilities that might or might not take place.

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2 Regional Scenario Findings

THIS PUBLICATION DISCUSSES the results of each of the five scenario work processes in Germany, Finland, Lithuania, Poland, and Spain. Each section follows the same logic:

- First, a description of the region is provided with a presentation of the market and market situation.
- Then, the following subsection illustrates the PESTE created for the region, presenting political, economic, social, technological, and environmental changes in the area.
- Next, four scenarios are presented by utilizing the change drivers chosen.
- In the end, each section is summarized in the form of guidance from the scenarios. They consist of notes of what should be conducted to reach the scenario, how to act in relation to the scenarios.
- Some reflection is provided on regional strategies, destination strategies, and how they align with scenarios at regional and at country level.
- Scenario descriptions finally demonstrate some recommendations on how to use scenarios in the organizations.

PESTE is a type of analysis, and the acronym PESTE stands for political, economic, social, technological, and ecological factors in an environment that influence an organization and its operations (Henriksson et al, 17). Carrying out a PESTE analysis especially with stakeholders can provide insight into different issues that can be trends or megatrends or any kinds of forces of change that might happen or not in the future, and how they can cause a ripple or big effect on the environment and organizations operating there.

The next sections go through the scenario work carried out by each partner in their respective countries.

Source

Henriksson, K., Mantere, P., Hardiman, M. & Riihihulta, J. 2021. [VISIT Workbook](#). Laurea University of Applied Sciences, Laurea Publications 180.

2.1 FINLAND, ROVANIEMI

Jami Riihivuhta

2.1.1 Description of the Rovaniemi Region

The city of Rovaniemi is in the heart of Lapland in Finland. It is the regional center of Lapland, an international tourism and university city, the center of trade, administrative and education, as well as a city of sports and culture. Because of the location and the cluster of expertise, a significant arctic ecosystem has been developed there. Lapland is one of the tourism focus areas in Finland's tourism strategy. Lapland is known for its pure nature, strong international brand, and as a responsible and sustainable destination. The Northern Lights, silence, reindeer, snowy landscapes, sport activities, and Santa's village attract tourists from all around the world. According to Finland's tourism strategy, a strong growth in the number of international travelers is expected in the near future. The high season in Lapland and Rovaniemi is from December to February.



Rovaniemi has expanded in all areas of key performance indicators and the population of the city is growing annually. There are 4,000 companies, and the number is also growing with about 400 new businesses established every year. Strong growth and internationalization of tourist numbers and the role of students has grown stronger during the past 20 years. The number of tourists has doubled in the past decade. The city has a population of 63,000 and around 10,000 students in secondary and higher education. More than 0.53 million tourists visit the region each year, with 756,000 overnight stays between January and November

2022, according to the latest statistics. In total, Lapland had 2.3 million overnight stays in 2021. Compared to the total number of overnight stays, Rovaniemi is attracting people with 1/3 share of total stays. There are five airports and two ports in Lapland. The largest trade clusters are metal and forest industries, tourism, and mining. Total turnover of the region is 13 billion euros.

There have been a lot of changes in the operational environment in the tourism sector. Digitalization and the amount of data available are challenging businesses. During the recent years, more and more skills are needed in the field to work digitally, however, not all actors have the time for training to learn the latest skills. VR is another recent addition to tools that can be used in promoting and offering tourism services but not everyone has the opportunity to learn how to use it in their work or even the finances to make it a reality. In many of the project workshops, it was one discovery that IT and digital skills are needed more than ever.

Visit Finland's Strategy states that there are three main impacts and factors influencing tourism. These factors are economic growth due to the increasing demand, developing sustainable traveling and competitiveness. The competitiveness of businesses in the field can be increased by developing digital accessibility, leading with knowledge, and creating impactful networks & partnerships. The vision is that Finland is a leading sustainable travel destination by adding value to society and customers, also by caring of Finland's unique environment.

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2.1.2 PESTE of Rovaniemi

Political Factors

The tourism industry in Lapland, particularly in Rovaniemi, has developed as an economic alternative after high unemployment rates caused by a decline in the forestry industry (Varnajot 2020; Falk & Vieru 2019). The city and regional stakeholders have cooperated since the 1980s to develop a hallmark tourist event associated with Christmas (Rusko et al. 2013). Recent strategies have focused on promoting year-round travel through the development of sports, wellness, tourist centers, the airport, and local villages (City of Rovaniemi 2022). Nevertheless, Rovaniemi's heavy dependence on tourism raises concerns about the need to diversify political focus and economic support towards other sectors.

Finland's brand as a safe and stable travel destination has enhanced Lapland's attractiveness as a tourist destination. Russia's war on Ukraine has impacted Lapland's regional politics and affect predictability and planning in the field. The growing military activity and presence in the Arctic region, partly due to climate change, threatens peace and stability in the area. At the city level, political decisions at the EU and national level have had a direct impact on Lapland's tourism industry. For instance, rules barring entry to Finland without being fully vaccinated with a COVID-19 vaccine approved by the European Medicines Agency was in

place since borders reopened during the pandemic, which led to a major decline in Russian tourists. Now in summer 2023, Russian tourists are not allowed to enter Finland with only few exceptions (Raja 2023).

Lapland Tourism Strategy 2020–2023's (Lapin liitto 2019) vision is that Lapland is easily connected to Arctic Europe with cross-border tour products such as the Visit Arctic Europe project. Cooperation with the Arctic Council states and actors in the Barents region is important for transportation. This includes land, sea and air transport which are essential for regional development. Whilst ports are important primarily for heavy industry, air traffic and airports are emphasized for the tourism industry and year-round tourism requires availability and particularly increased air traffic during low season.

Economic Factors

Tourism has become the major industry in Rovaniemi, where the service sector accounted for 84.2% of the economy in 2015. (City of Rovaniemi 2021). Tervo-Kankare et al. (2013) state that tourism generates more employment in Finnish Lapland than other economic sectors with a direct income of 1.7 billion €, but this seems pronounced in Rovaniemi. Rovaniemi, despite being the 16th most populous city in Finland, ranked second in terms of overnight stays in December 2019, just behind Helsinki (Varnajot 2020). However, remote destinations like Rovaniemi are more vulnerable to economic and financial crises, as evidenced by a drastic 98% decrease in international tourist stays in Lapland in December 2020, primarily driven by a significant reduction in British visitors (Falk & Vieru 2019; Official Statistics of Finland [OSF] 2021a). By 2021 the rebound to 2019 levels was also dramatic, driven by returning British tourists, although Russian tourist stays declined.

The impact of the COVID-19 pandemic on Lapland's tourism industry was severe, leading to a surge in unemployment, particularly in service sectors reliant on tourism. The unemployment rate in Lapland increased from 6.5% in 2019 to 7.9% in December 2020, slightly above the national average (Official Statistics of Finland [OSF] 2021b). While the recovery in hotel occupancy has been spectacular, it remains unclear whether occupancy rates have recovered at the same rate.

Finland's tourism strategy for the years 2019 to 2028 and action plan for 2019 to 2023 are focused on sustainable growth and renewal of the tourism sector. This has been mirrored by the Lapland Tourism Strategy and Rovaniemi City Strategy, which seek to spur year-round tourism, with particular emphasis on building the Arctic Summer brand and fostering sustainable development.

Social and Cultural Factors

Lapland, which comprises 30% of Finland's land area but is home to only 3% of its population, is currently grappling with demographic challenges such as aging and young adults moving away, although Rovaniemi has experienced a growth in population. The aging population poses a significant impact on services and livelihoods, but the COVID-19 pandemic might have shifted migration patterns with the rise of remote work and emphasis on the home environment potentially stabilizing or even increasing the population. With fast telecommunication links being promoted throughout the city area, this may lead to further concentration of the region's population in and around the city, but the challenge of an aging population remains.

Finland's new Arctic policy strategy sets out Finland's key objectives in the Arctic region. It includes a commitment to the inhabitants and the "promotion of wellbeing and the rights of the Saami as an indigenous people" (Brander & Borg 2021). Rovaniemi's tourism offerings largely revolve around Sámi culture, such as reindeer farms, sledding rides, and northern lights experiences, providing a platform for Sámi individuals to showcase their community. The benefits to visitors included participation in meaningful experiences and exposure to different, slower, lifestyles (Carr et al. 2016).

According to Finland's Arctic Policy Strategy (Brander & Borg 2021), indigenous peoples in the Arctic are disproportionately affected by mental health and suicide issues, which represent a severe public health crisis. The changes in social factors could have been the reason to difficult challenges for the people and their communities because of often altering life circumstances in the region. The convergence of contrasting traditional and modern cultures presents additional dilemmas, particularly for the younger generation.

Technological Factors

The digital revolution has greatly impacted tourism in Lapland, transforming customer purchasing paths and marketing strategies. Recognizing the significance of digital marketing and online research, the Lapland Tourism Strategy 2020–2023 (Lapin liitto 2019, 23) prioritizes the digitalization of businesses. Travelers in Lapland are not only technologically savvy but also value sustainability and authentic experiences, relying on fellow travelers' reviews to inform their decisions. However, Rovaniemi still faces challenges with connectivity, despite efforts to promote fast telecommunication links.

The integration of mobile phones and the Internet of Things presents both opportunities and challenges in Lapland's tourism industry. Hotels now offer app-controlled room features, such as thermostats and televisions, while smart suitcases enable efficient baggage tracking. Virtual assistants provide personalized services, and augmented reality enhances historical experiences. However, the increased reliance on the internet also brings cybersecurity concerns, necessitating investments in training and security solutions.

Lapland's transportation system plan for 2040 (Lapin liitto 2021) aligns the improvement of digital infrastructure with road upgrades to ensure efficient communication links. Nevertheless, the region faces challenges in transitioning to sustainable mobility from fossil fueled transport, due to cold temperatures affecting battery performance and the vast distances across Lapland, combined with a sparse population. Moreover, the development of the Arctic Circle-SantaPark airport area to meet tourism demands presents sustainability challenges. While trials for small electric aircraft have been conducted, passenger planes powered by alternative sources remain a distant reality. The growth of robotics offers potential solutions to resource gaps and reduces human-to-human contact during the pandemic.

Environmental Factors

The importance of the natural environment to Rovaniemi's appeal is connected to its authenticity as a Christmas destination; in particular the winter landscape including native species such as reindeer (Tervo-Kankare et al. 2013; Kajan 2014). Varnajot (2020) points to a study that showed that over three quarters of tourists would not have made the journey to Rovaniemi without snow at Christmas. This negative environmental impact of lack of snow on the visitor experience has already occurred with some travel operators already directing trips further north (Tervo-Kankare et al. 2013). This makes the promotion of Arctic Summer and year-round tourism key to growing tourism in the Rovaniemi region.

Preserving the natural environment in Rovaniemi is becoming increasingly important as visitors and residents alike become more aware of the Arctic's vulnerability to climate change. Aware of the fragility of this unique ecosystem, the city takes on a shared responsibility to protect and preserve its pristine landscapes. As Rovaniemi serves as the gateway to the Arctic, efforts are being made to strike a balance between tourism and environmental sustainability so that future generations can continue to enjoy the wonders of this unique region. The winter season is already shortening, and the frequency of snowless Christmases is predicted to rise significantly within the next few decades (Varnajot 2020; Falk and Vieru 2019; Tervo-Kankare et al. 2013). Finland's Strategy for Arctic Policy 2021 (Brander & Borg 2019) notes that the "Arctic region with its sensitive

ecosystems is warming faster than the rest of the world, and in areas characteristically covered by snow and ice, the changes can be seen and felt in concrete terms.”

Climate change in the Arctic region brings additional risks, such as increased rainfall leading to flood risks and dry summers exacerbating forest fire dangers. Developments in and around the city will have to take account of these increased risks, including the development of the city center’s riverside tourism, leisure activities, and accommodation. This change could lead to economic opportunities including resource extraction; however, Finland has stated that the exploitation of new fossil reserves in Arctic conditions is incompatible with the Paris Agreement. Such developments may also negatively affect tourism by blighting the landscape.

Finland’s ambitious goal of achieving carbon neutrality by 2035 requires low-emission solutions. However, Rovaniemi’s heavy reliance on air transport to accommodate international visitors poses a potential challenge to achieving sustainable mobility goals. In order to find a balance, a shift to more sustainable modes of transport, such as rail, for local, regional, and national travel is needed. This transition will serve to counterbalance the environmental impacts of air travel and bring Rovaniemi’s tourism industry in line with the broader goal of achieving carbon neutrality. (State Treasury Republic of Finland 2023.)

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2.1.3 FOUR Scenarios for Rovaniemi

The drivers of change were selected based on the PESTE analysis and monitoring. These changes are going to have severe impacts on the Rovaniemi and Lapland area. These future changes are climate change, including peoples' and tourists' awareness of it and expectations towards travel, and sustainable development of the tourism ecosystem. The uncertain economic situation and the potential labor shortages are challenging entrepreneurs already and these issues are a growing threat. Digitalization and technological developments were seen as an opportunity. The review also considered change in megatrends/trends, as well as considering the monitoring of the business environment, weak signals and wild cards that emerged from the monitoring of the environment. The trends identified were authentic nature experiences and authentic experiences, on the other hand, the carrying capacity of nature. Weak signals include new laws and regulations in the field of nature conservation.

Scenario 1: Sustainability is the New Normal

Assumptions: sustainability is emphasized in all areas, while climate change impact will slightly increase. The economic situation will deteriorate, and the global political situation remains unchanged. It is assumed that technology will enable further development.

Consequences: responsibility is ubiquitous in everyday life; it is not specifically emphasized. The deterioration of the economic situation can be an advantage for businesses. The impact of the pandemic on the popularity of domestic tourism will remain a permanent phenomenon.

Climate change will have a greater impact than today. For tourism in Lapland, it will be negatively affected all year round, especially by poorer snow conditions and spring floods. Tourism will focus on responsibility and environmental awareness. Legislation on sustainability is also tightened, for instance, regulation of emissions. The low wealth of people does not hamper tourism, nor does it make it more difficult to travel. However, for example, travel is in many respects cheap and easy, due to, for instance, airplanes' energy technology and improved rail and road connections transport.

Domestic tourism is gaining in popularity as a result of sustainability thinking, and businesses with the profile of a more affordable tourist destination are attractive. However, many tourism business costs have increased, which brings challenges for business development. Businesses are investing in new technology, such as check-in, and, thus, they can compensate for other increased costs by using the saved investments in other operational areas. Increased domestic tourism during the pandemic will continue to exist, climate change will have a growing impact, technological developments open new opportunities, and the global political situation is calming down.

Table 1. Sustainability is the New Normal SWOT

STRENGTHS	WEAKNESSES
Sustainability becomes normal, and the global political situation remains unchanged and will not negatively affect Lapland’s tourism.	Climate change and the stand-still or depression in economy has stopped development. Business as usual will not develop on its own.
OPPORTUNITIES	THREATS
Sustainability will become the normal standard. Technology will support daily operations. Low-cost businesses will gain a competitive edge in the case of stand-still economy.	Deteriorating snow conditions limit tourism in the winter. The variation of weather and poor predictability of weather conditions make the start and end of season demand unsure. International and domestic sustainability regulations will bring additional costs in the beginning.

Scenario 2: Attractive Responsible Tourism and Happy Life

Tourism is booming. People appreciate new experiences, and they want to experience something authentic. Lapland is in fashion. Responsible tourism brings tourists modesty and homeliness to the values of tourists. Appreciation of locally produced products benefits small and medium sized companies. Showiness and unsustainable traveling are out of fashion. There are no large seasonal variations in demand. During the winter, Lapland continues to attract, while in summer, Lapland offers a wonderful change of scenery for people who are suffering from central Europe’s stifling heat.

What kind of future will be in this scenario? The global political situation has calmed down, and Europe in particular is experiencing a time of peace again. Commitments to climate change mitigation have delivered results. The northern regions have come out on top: winter snow has been preserved, in summer, the heat is mild, while Central Europe is already too hot. Responsibly produced energy is available, and the energy crisis is overcome. Managed immigration will ease labor shortages. State support for the tourism sector education and marketing has paid off and the sector is perceived as attractive.

Businesses’ finances are secure, and economic growth will continue. There will be snow in Lapland as before in the high season, sometimes in low season, too. Companies are still able to meet the high demand and maintain high quality. Land-use permits are easier to negotiate, and businesses have the opportunity to expand their operation in a sustainable way. There are enough employees and new candidates, and there are plenty of new recruits available. A steady flow of tourists through travel agencies and interest in Lapland are maintained and increasing. Tourism is not restricted, and people will be able to travel free. However, businesses must be able to plan for the future and prepare for possible restrictions on their usage of natural resources.

Table 2. *Attractive Responsible Tourism and Happy Life SWOT*

STRENGTHS	WEAKNESSES
The domestic and international tourism increases in a sustainable way. The interest towards Lapland grows, and, as a destination, the strong brand will become even stronger. The climate will remain favorable for tourism, and there will be enough skilled employees on the market.	The small and medium-sized enterprises are more dependent on online and offline travel agencies.
OPPORTUNITIES	THREATS
Businesses can expand their operations, for example, by investing in more capacity and sustainable services. Sustainability has been recognized to reduce costs in the long run. Investments in sustainability offer companies possibilities for better profitability.	There are not enough will and actors to solve sustainability issues. Companies are unable to answer to the growing demand. Mass tourism and overtourism will take place and several new sustainability issues will emerge. There is not enough skilled labor on the market.

Scenario 3: Slowly Changing Environment

In Lapland, a long, snowy season is already less common. The snow season is delayed, and the climate warms up considerably in spring. The extended warm season shortens the high season in Lapland. Tourism is still popular, and tourists have purchasing power. Local businesses need to work even harder during the high season, in order to capture as many customers as possible. This phenomenon of a shorter high season has resulted in tourists arriving in Lapland in larger numbers for a shorter period of time than before. This may cause the quality of the services to decline, and the customer experience may suffer. There is still enough demand in the market, and businesses are able to maintain their operations profitable. It is increasingly difficult to attract employees, especially skilled ones. In addition, employees' motivation and wellbeing are declining due to the long and intensive working days. There are no restrictions on the use of natural resources.

Climate will slowly turn warmer in the area. Local people are still staying and living in Rovaniemi as before. Domestic tourism is increasing during the summer. Consumer purchasing power mostly decreases, and people are seeking for cheaper experiences. There are still enough niche customers for high quality and expensive services. Public funding is decreasing, and it causes public bodies to spend less money on travel and experiences, such as for schools and municipalities.

Table 3. *Slowly Changing Environment SWOT*

STRENGTHS	WEAKNESSES
There is already knowledge and some equipment for low season services and products.	Skilled workforce is difficult to find and attract. There is a dependence on travel agencies.
OPPORTUNITIES	THREATS
Opens possibilities to year-round service products and rebranding.	The high season is becoming shorter. The investments in new services are expensive and contain more risks than before.

Scenario 4: Unsustainable Future / Black Winter

The impact of climate on tourism has not reduced and tourism is frowned upon. At the same time, it has become a delicacy for the few. Because tourism is seen as a rare experience, it emphasizes luxury and individuality. Lapland is a place to be seen, accessible only by private flights. Customers are mainly people who come to Rovaniemi to work and occasional passers-by. Years are different from one another; people's travel plans and the time span of people's travel plans are short, making forecasting difficult. Investments are moderate, as you never know what the next season will bring.

How did the unsustainable future emerge? Climate change has progressed faster than anticipated, causing anxiety among people and waves of refugees. In Lapland, too, the climate has become volatile, with floods and other extreme climate phenomena increasing. Warm summers have exacerbated the number of mosquitoes even higher. Pandemics occur regularly, and this makes travel abroad unsafe. As a result of climate change, taxes on flying have been tightened. Energy consumption is increasing, and electricity is expensive. We are living in a time of recession. Despite the efforts of the state and municipalities, the attractiveness of the tourism sector has remained poor and labor shortages continue to plague the sector. There are no direct scheduled flights to Lapland.

In Lapland, the snow situation will deteriorate radically, so that the snow season is significantly shortened, and it is uncertain whether there is snow in winter at all. Travel and leisure flying is generally disapproved, and travel restrictions are planned, especially on flying, which would have a particular impact on the number of international tourists arriving to Finland. In the Lapland region, land use rights are difficult to get approved and new agreements are not easily granted to operators. Businesses' viability is under threat. Special attention must now be paid to safety issues, and companies are required to prepare themselves against network attacks. Tourists arriving via railways are becoming more and more important, and attempts are being made to attract domestic customers. The use of animals in tourism business has been restricted. It is difficult to attract foreign employees due to travel restrictions, and, in Finland, the number of study places available for students of tourism have been radically reduced due to uncertain employment prospects. The reduced number of students and the prevailing shortage of workers in the sector, makes recruiting difficult.

Table 4. *Unsustainable Future / Black Winter SWOT*

STRENGTHS	WEAKNESSES
Team spirit of the staff. Networks and strong partnerships will support the resilience of the local business ecosystem.	The short season will make the business environment challenging. The possibility of seasons with no snow leads to the decline of attractiveness and the Lapland brand. Tourism businesses become unprofitable.
OPPORTUNITIES	THREATS
Innovating new services for low seasons and exploiting new areas of service. Developing virtual and augmented reality services.	Environment changes are radical, and their impact on tourism is devastating. The profitability of tourism businesses is threatened. External regulation threats are increasing and pose demands on the company. Travel agencies are no longer interested in arranging tours in Lapland, and interest shifts elsewhere.

2.1.4 Points to be Acknowledged from the Scenarios for Rovaniemi

Scenario 1: Sustainability is the New Normal

Public bodies and organizations are encouraging and supporting tourism businesses and tourists towards the sustainable tourism ecosystem. Economically, socially, environmentally, and culturally responsible choices are brought into the center of decision-making. The tourism sector will be partly voluntary and partly legally legislated to invest in sustainable solutions in their operations. Travelers are aware of how to travel in a sustainable way, and tourists are seeking low season opportunities. Tourists are recommended to stay longer, and this will open business opportunities for long term services. When services are consumed in a longer time period, it is eventually more profitable for the businesses and more affordable for tourists. The number of domestic tourists is increasing, and some services can be developed for this customer segment.

Responsible choices in tourism are supported by continuous customer-centered development and a strong emphasis on safety, equality, and accessibility in the development of tourism services. Product development considers the accessibility of the destination and also supports the development of sustainable travelling options by creating low emission transportation chains and routes. Investments to sustainable services and products must be profitable to companies. The customers can be directed to consume the services with responsible communication and marketing.

Scenario 2: Attractive Responsible Tourism and Happy Life

In this scenario, the investments in responsible tourism have been beneficial for the tourism sector in Lapland. Customers are aware of responsibility and are seeking unique and authentic experiences. Locality and homeliness are valued, and it will probably expand the sharing economy possibilities. The rise of sharing economy will have an impact on businesses so that companies must adapt even more to the change of markets. Companies are able to compete in sharing economy with similar offerings with private service providers or with quality and safety of its services. The increasing tourist flow will challenge sustainable development and all the stakeholders are expected to take part in joint efforts to steer towards responsible tourism. The good image and brand of Rovaniemi increases the demand and may lead to restrictions in the number of tourists allowed in the area at the same time.

A balanced and predictable future will allow companies to make foresight strategies. There are less risks on investments in a high demand market. The impact of the sharing and platform economy on tourism will be actively monitored. Any measures required will be taken to provide equal opportunities between businesses and private service providers in the market.

Scenario 3: Slowly Changing Environment

In this scenario, climate change is slowly affecting Rovaniemi region. High season is starting later and ending sooner. The number of tourists remains on the same level, but the visits are scheduled for a shorter period of time. The high season will be overpopulated and the peak in demand will get higher every year. This results in companies trying to get annual profits in a short timeframe. Customers will have purchasing power so travel will be more expensive. At the same time, there is a risk that the quality of services will decline. Companies and municipalities need to work together if the overtourism situation occurs to preserve sustainable development.

The demand may split into two segments based on the buying power. The people, who have high income, are able to travel to Rovaniemi and Lapland in the high season. The other segment, with less income and

buying power, will travel before and after the high season. This may lead to the polarization of services and companies. The companies which are in a healthy financial situation are able to benefit from this change. These companies are able to invest in new ventures and development.

Scenario 4: Unsustainable Future/ Black Winter

In this scenario, tourism business strategies will have to change because there are not enough customers even during the high season. The businesses need to extend their operations to year-round, to maintain the profitability and viability. The tourism businesses may need to expand to other business sectors or concentrate to survive with niche segment customers. For travel agencies and local businesses, it is difficult to reach high paying customers from international markets. Domestic customers are arriving via railways and local transportation is supporting accessibility.

The development of virtual and augmented reality may provide opportunities for businesses. Also directing marketing to business travelers, instead of leisure travelers, could be beneficial. Rovaniemi area could attract students and workforce with specific higher education and investments in the information technology sector. As a secure and still relatively cold city, technology industry would benefit from these circumstances. Investments on technology development or manufacturing would bring business customers to tourism companies.

2.2 GERMANY, SCHLESWIG-HOLSTEIN

Marco Hardiman, Jan Bretschneider & Kalender Topal

2.2.1 Description of Schleswig-Holstein and the Market Situation

Schleswig-Holstein, a federal state in Germany, is situated in the country's northernmost region, covering an area of around 15,800 square kilometers. It borders both the North Sea and the Baltic Sea and is partitioned into 11 districts. Known for its picturesque countryside, charming coastal towns, and rich cultural heritage, Schleswig-Holstein with Kiel as its capital has an approximate population of 2.9 million people. (Wikipedia 2023.)

The region boasts a diverse economy, with substantial contributions from industries such as agriculture, tourism, the services sector, and maritime industries. The agricultural sector plays a significant role in the regional economy, with major crops like wheat, barley, and potatoes. Moreover, the region has a strong foothold in the renewable energy sector, particularly wind energy, and is home to many leading family businesses which are global market leaders in their product categories (known as hidden champions).

Currently, Schleswig-Holstein is experiencing a period of economic growth. The unemployment rate is low, and the region is well-positioned to leverage the development of digital technologies. There is a strong emphasis on renewable energy, and the region hosts some of the world's leading energy companies. Its booming tourism sector is becoming increasingly attractive to foreign investors.

Tourism is a vital industry in Schleswig-Holstein, attracting visitors from all over the world with its beautiful beaches, historic cities, and cultural attractions. The region possesses a well-developed tourism infrastructure, with a plethora of hotels, restaurants, and tourist attractions catering to visitors.



In recent years, the Schleswig-Holstein region has experienced steady economic growth, with a focus on promoting sustainable development and innovation. It is home to several research institutes and universities, which support the growth of high-tech industries.

The current market situation in Schleswig-Holstein is generally stable, with a strong emphasis on sustainability and innovation. The region's well-educated workforce makes it an appealing destination for businesses looking to establish a presence in Northern Europe.

However, the ongoing COVID-19 pandemic has significantly impacted the tourism industry, traditionally a major contributor to the regional economy. Despite this, the region has demonstrated resilience, with many businesses adapting to the new normal by implementing safety measures and offering new products and services to meet changing customer needs. In 2023, tourism has returned to normality.

Fehmarn Island

Fehmarn is a small island in the Baltic Sea, situated off the coast of Schleswig-Holstein. The island, known for its beautiful beaches, nature reserves, and charming seaside villages, has recently seen a growing emphasis on sustainability and environmental protection.

Fehmarn has become a popular destination for ecotourism and sustainable living. The island is home to numerous green initiatives, such as a solar-powered ferry, an electric bus network, and a network of electric charging points.

The market situation on Fehmarn is positive. Tourism is a major industry on the island and continues to grow. There is a strong presence of small and medium-sized businesses, such as hotels, restaurants, and tourist attractions catering to visitors. These businesses are focusing on sustainable products and services to reduce their carbon footprint, as well as businesses centering on renewable energy and organic farming.

Fehmarn is also home to numerous parks and nature reserves, housing rare species of flora and fauna. The island promotes sustainable agriculture, with several organic farms in operation.

Several initiatives have been implemented on Fehmarn to promote sustainable tourism and protect the island's natural resources. For example, there are numerous cycling and hiking trails allowing visitors to explore the island's natural beauty without relying on cars or other pollution-contributing transportation methods. The island also has a strong emphasis on waste reduction and recycling, with several recycling centers and waste separation systems in place.

The ongoing COVID-19 pandemic has resulted in a significant decrease in tourism. However, the island is expected to rebound in the coming years. Many businesses and local authorities are implementing new initiatives to attract visitors and promote sustainable tourism. The construction of the Fehmarn Belt Fixed Link, a proposed tunnel connecting Fehmarn to Denmark, is also expected to boost tourism and economic activity on the island once completed.

Source

Wikipedia. [Schleswig-Holstein](#). Accessed 15.05.2023.

2.2.2 PESTE of Schleswig-Holstein

Political Factors

Political globalization is an overarching theme that greatly affects Schleswig-Holstein, a region benefitting from EU membership and German political stability. However, it also faces challenges like increased regulation. The region can capitalize on opportunities created by political globalization, climate decisions, traffic, and pricing control, provided these are managed effectively.

Schleswig-Holstein has a robust legal and regulatory framework ensuring safety and security. It boasts effective law enforcement agencies and a focus on cybersecurity, safeguarding critical infrastructure while promoting digital innovation. The region's businesses need to stay updated on safety and security regulatory changes, especially those relating to EU regulations.

The region is also recognized for its firm environmental regulations and taxes, designed to protect natural resources and promote sustainable practices. The government supports renewable energy growth, aiming at carbon neutrality by 2050. Schleswig-Holstein's energy supply is generally secure, with a diverse energy mix and a robust infrastructure.

Lastly, the pandemic's travel restrictions have significantly impacted businesses, particularly those in the tourism sector. Businesses should continue to monitor and adapt to changing pandemic-related measures and travel restrictions.

Economic Factors

The trend of increased cooperation between businesses and countries, facilitated by globalization, offers potential growth opportunities for Schleswig-Holstein, despite challenges like cultural and language barriers. However, the region faces an uneven distribution of wealth, potentially stunting economic growth. In 2023, a predicted economic slowdown may negatively impact businesses, but recovery could spur growth.

The trend of digital nomads could boost local economy given supportive infrastructure is in place. The aging population may lead to labor shortage and increased healthcare costs but offers growth opportunities in healthcare and senior care services sectors. The decrease in shipping may affect the region's maritime sector, but less pollution and alternative transportation methods could create new job opportunities.

A maritime training center could attract people, creating jobs and enhancing local workforce skills. Shipping threatened by road traffic calls for improved transportation infrastructure and sustainable transport methods. The increasing number of hotels suggests potential job creation and tourism growth, but it could strain resources and pose challenges for smaller establishments.

Extensions of tourists' stay could boost the local economy but strain resources. Lack of employees, particularly in the tourism and hospitality sector, may lead to increased recruitment costs and prices. Uncontrolled growth risks overconsumption of resources, overcrowding, and environmental degradation, highlighting the need for a balanced economic growth and sustainable development.

Sociocultural Factors

The economic workcation trend could positively influence Schleswig-Holstein's tourism industry by attracting remote workers, leading to an extended tourism season. However, the requisite infrastructure, like high-speed internet and coworking spaces, must be in place.

Current pandemic-related travel restrictions and a decrease in disposable income have increased domestic destinations' appeal, such as Schleswig-Holstein. Conversely, if travel is seen as irresponsible due to health and sustainability concerns, it could harm the economy. The vacation home buying trend might stimulate tourism and increase property prices, but it could also create housing affordability issues and potential gentrification.

Schleswig-Holstein's marine resources could be used for health and wellness services, creating a new niche tourism sector, especially for the aging population. However, sustainable practices are crucial. Simultaneously, the growth in nature and activity tourism presents both economic opportunities and sustainability challenges.

The region's natural resources make it an ideal location for wellness and health vacations, which could stimulate the local economy. The rise in local tourism, reflecting a desire for authenticity and responsible tourism, offers Schleswig-Holstein a chance to promote its unique cultural heritage and natural attractions, aiding local economy and job opportunities.

The focus on health, hygiene, and comfort, accelerated by the pandemic means that the tourism industry must adapt to new demands. The emergence of "Feel-Good-Mobility" and "Slow Travel" shows a growing preference for sustainable and health-promoting travel options. Promoting these forms of travel can attract tourists who prioritize well-being and sustainability.

The increasing senior population could stimulate senior tourism, necessitating the development of senior-friendly infrastructure and services. Lastly, the trend of value-based tourism could increase the demand for sustainable and responsible tourism practices, promoting the development of new tourism products and experiences that align with these values.

Technological Factors

The digitalization of tourism and services in Schleswig-Holstein is bolstered by investments in tech infrastructure and the adoption of online marketing strategies, reservation systems, and mobile apps. The Fehmarn-belt tunnel, connecting Denmark and Germany, will vastly improve technological reachability, opening new economic avenues. Innovative technologies such as VR and AR are being explored for their potential in enhancing tourism and education.

Simultaneously, the trend of remote work vacations is gaining popularity, leading to economic benefits and reduced carbon footprint. The focus is shifting towards sustainable practices in tourism, including renewable natural resources, efficient resource management, and ecotourism. Technological advancements in aquaculture facilities and accommodation modernization are enhancing both production and guest experiences.

Schleswig-Holstein is further exploring wind energy production, ensuring responsible environmental management. The rise of digital technology in tourism has empowered customers with more choices and control, potentially leading to commoditized connectivity. Lastly, the importance of personalization in tourism services is growing, necessitating stringent consumer data and privacy protection.

Environmental Factors

Global warming significantly impacts Schleswig-Holstein due to its coastal location, making it vulnerable to rising sea levels, altered precipitation patterns, and extreme weather events. These changes threaten not only the natural and built environments but also crucial economic sectors like agriculture and forestry. Additionally, the region's biodiversity, home to many temperature and precipitation-sensitive species, is at risk. To combat these challenges, Schleswig-Holstein is reducing greenhouse gas emissions, improving energy efficiency, and promoting renewable energy sources.

Warmer temperatures due to climate change could result in both positive and negative implications for the region's tourism industry. Increased beach tourism and outdoor activities may boost the local economy, but risks like natural disasters, harmful algae blooms due to higher water temperatures, and altered wildlife migratory patterns can negatively affect the region.

Schleswig-Holstein is also witnessing a surge in environmental awareness, with tourists and locals increasingly considering the impact of their actions on the environment. This includes the potential implementation of a Green pass for companies and households, promoting sustainable practices. However, the region faces challenges like the restriction of water sports due to their environmental impact, potential overtourism, and pollution in the Baltic Sea.

The increased awareness of nature and climate issues is driving demand for sustainable products, services, and responsible tourism options. This trend encourages businesses to adopt sustainable practices and stimulates environmental education initiatives. Prioritizing sustainability and nature protection can ensure the long-term health and viability of Schleswig-Holstein and its associated industries.

2.2.3 Scenario Development for Schleswig-Holstein: Navigating Aging and Global Warming

As we look to the future of Schleswig-Holstein, it is vital to consider the critical trends that will shape the region's trajectory in the coming years. Two trends, in particular, have been identified in scenario workshops as paramount by the region's stakeholders: aging and global warming. These trends have been chosen based on their potential impact and the necessity for Schleswig-Holstein to adapt and thrive amidst these changes.

The aging trend represents the demographic shift we are experiencing, with an increasing proportion of older people in the population. This demographic transition will affect multiple aspects of society, from healthcare and social services to the economy and labor market, and will also influence tourism, one of the significant economic sectors of the region.

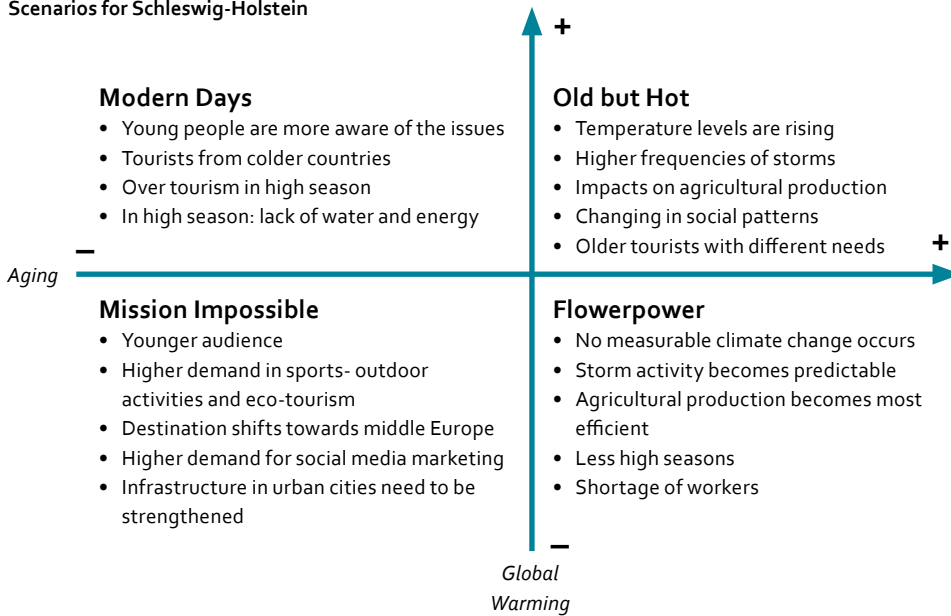
On the other hand, global warming represents a universal challenge that is particularly relevant for Schleswig-Holstein. As a coastal region, it must confront the risks and realities associated with rising sea levels, changing weather patterns, and the impact these changes will have on the natural environment, agriculture, and again, tourism.

In recent scenario workshops, stakeholders across different sectors came together to discuss these trends and their implications for Schleswig-Holstein. Through a collaborative and inclusive process, they developed scenarios that reflect different possible futures for the region, based on high and low manifestations of these two trends.

The purpose of these scenarios is not to predict the future but rather to provide a comprehensive framework to explore possible futures. This approach enables us to prepare and strategize effectively, ensuring that Schleswig-Holstein is resilient and adaptable, no matter what the future holds.

The following sections present each scenario in detail, exploring the potential challenges and opportunities, and the strategic implications for Schleswig-Holstein. We invite you to join us on this journey as we navigate the future together, taking proactive steps to shape a sustainable and prosperous future for this region.

Scenarios for Schleswig-Holstein



Graph 1. Graph of Schleswig-Holstein Scenarios

Scenario 1: Modern Days

In this scenario, the demographic trend leans towards younger generations while climate change intensifies. This situation triggers several impacts, including resource shortages, shifting travel interests, and altered climate conditions. Consequently, tourism companies will require innovative solutions to accommodate the evolving demands and interests of tourists. New hotspots will have to develop certain aspects of their infrastructure and brace for overtourism in Central Europe.

One trend likely to persist is the growing interest of tourists from colder countries, such as Scandinavia and Russia, towards Central Europe as they seek warmer climates. While this presents opportunities for the tourism industry, it also raises concerns about overtourism during the high season. An influx of visitors could strain local resources like water and energy and exacerbate social issues such as overcrowding and noise pollution. Hence, tourism companies will need to devise strategies to manage crowds and ensure the local infrastructure can accommodate the surge in visitors.

Conversely, former tourism hotspots like Italy and Spain may see a decline in their visitor numbers as these countries could become too hot and uncomfortable for vacationing. They will need innovative solutions to tackle this challenge as they risk losing a crucial economic pillar.

Another issue confronting the tourism industry in Central Europe is climate change's impact on the region's natural resources. Rising sea levels and increased storm activity might result in beach erosion and other coastal area degradation, making them less appealing to tourists. Furthermore, climate shifts could alter the region's biodiversity, potentially affecting ecotourism and other nature-based activities. For example, venomous snakes or spiders may settle in parks, necessitating special staff to maintain control and ensure tourists are not adversely affected.

The heightened demand for tourism in Central Europe will amplify the need for infrastructure development. This includes accommodations like hotels, Airbnb's, or cottages, as well as improvements in

public transportation, such as trains, buses, bike rentals, and e-scooters. Expanding bike lanes could facilitate better access to certain locations and reduce the risk of accidents.

In addition to environmental considerations, tourism companies need to be cognizant of shifting demographic trends. Young travelers, more conscious of their environmental impact, may prefer eco-friendly or sustainable destinations. They might also be more interested in cultural experiences and outdoor activities. Therefore, tourism companies must adjust their offerings to align with these evolving preferences.

Furthermore, demographic shifts could bring about disruptive technological impacts. Young generations, more open to technology, might embrace concepts like Virtual Reality and the Meta-Verse for cultural insights and international connections. This on-demand traveling could cater not only to individuals with health issues or general travel discomfort but also to those seeking to avoid causing severe pollution. Additionally, it opens new avenues for social media marketing and promoting tourism and could be used for attending events like stand-up comedy shows or concerts without long-distance travel.

In conclusion, the tourism industry in Central Europe is confronting a new reality as climate change intensifies and young generations become increasingly aware of the problem. By adopting a proactive approach, tourism companies can attract young travelers while contributing to a more sustainable future for the region.

Scenario 2: Old but Hot

In Scenario 2, Old but Hot, the region of Schleswig-Holstein increasingly feels the impact of climate change. Average temperatures are steadily rising, prompting slow yet noticeable changes in nature as it adapts to these new environmental conditions. Rising sea levels and more frequent storms pose threats to the region's infrastructure, potentially leading to costly long-term repairs. Furthermore, changing weather patterns significantly impact agricultural production, damaging crops and resulting in smaller harvests than usual. Consequently, agriculture, a vital regional and economic sector in Schleswig-Holstein, comes under pressure.

Concurrent with these climate changes, the average age of both the local population and visiting tourists is rising. Older tourists have different needs and preferences compared to their younger counterparts, prompting businesses in Schleswig-Holstein to adjust to these shifting social patterns. Older tourists are often more sensitive to the effects of global warming; while moderate warmth can be beneficial, extreme heatwaves can significantly affect their travel plans. Moreover, older tourists usually have more disposable income and often show more interest in cultural or historical experiences. Generally, their visits tend to be less economically impactful or destructive compared to those of younger tourists. The tourism sector of Schleswig-Holstein benefits from this, as older tourists are more likely to visit during off-peak seasons, thus balancing high season visitor influxes.

This scenario presents potential positives for Schleswig-Holstein's tourism sector. Climate change could prompt the region to reevaluate its current status quo, uncovering various opportunities. Numerous new businesses could establish themselves, creating many jobs. The prospect of attracting many new tourists in the coming years also exists, with infrastructure developed to accommodate this scenario.

Scenario 3: Mission Impossible

Given the ongoing demographic shift towards an older population, driven by advancements in the medical industry in recent decades, it is anticipated that this trend will persist. However, there may be factors leading to a reversal in this trend, with a decrease in the older population and an increase in the number of younger people. Furthermore, in this scenario, the government and society are committed to principles and values to

stop climate change, thereby stabilizing the weather in Central Europe and preserving the seasons. Although this scenario seems unlikely, it remains crucial to contemplate the implications to respond appropriately.

Primarily, demographic changes may result in a surge in general tourism demand as young individuals typically have more leisure time and seek adventure or novel experiences. This could stimulate increased interest in sports, outdoor activities, and ecotourism.

Moreover, a demographic shift towards young people might alter travel patterns. Young travelers could show a greater interest in urban locations rather than traditional vacation spots. Consequently, tourism infrastructure in capitals or larger cities should be enhanced and tailored to a young audience. Given society's focus on green values to combat climate change, it is also crucial to invest in ecotourism infrastructure in urban regions, such as bike paths, hiking trails, and nature reserves. Alongside these shifts, tourism offerings may also evolve. For example, music, food, wine, or sports tours might gain popularity. Clubbing and nightlife could become more valuable. Public transportation should also be prioritized, given the limited travel resources of young generations and its environmental friendliness compared to car travel. Consequently, young individuals might opt for vacations within a smaller radius rather than globe-trotting, as this is more sustainable. In general, sustainability should be a priority for all companies in this scenario, with a focus on renewable energy resources, carbon emission reduction, and waste minimization to earn societal approval.

Another significant factor is the ongoing digitalization. Many tourism companies still use analog products like train tickets, hotel cards, or maps to cater to the older generation, which is stereotypically averse to technological progress. Demographic changes might shift this dynamic, allowing companies to invest in digital solutions, potentially reducing material costs in the long run. Moreover, tourism companies and cities will need to reorient their marketing strategies towards social media to reach a younger audience.

The burgeoning demand for tourism and shifting travel patterns could yield positive economic impacts for the region. This includes increased revenue for local businesses and job creation, not just full-time positions but also a greater need for temporary staff during high-sales seasons like summer and spring. These roles could be filled by students on summer and spring breaks, who might then spend their earnings on vacations in the following season.

In conclusion, this scenario presents numerous opportunities for the tourism industry, particularly in urban areas. Traditional tourism companies need to reconsider their offerings to stay competitive with emerging counterparts. For instance, beach vacations, typically favored by families, could incorporate sports activities like beach volleyball, surfing, or other water sports to appeal more to a younger audience.

Scenario 4: Flower Power

In Scenario 4, Flower Power, the region of Schleswig-Holstein experiences no further climate changes or global warming effects. Average temperatures remain steady, sea levels stop rising, and storm activity becomes more predictable. This stability helps mitigate some economic costs associated with adapting to and alleviating the impacts of global warming. A consistent and more predictable weather pattern would enhance the region's agricultural productivity and efficiency.

In addition to the climate's stability, the average age of both the local population and visiting tourists decreases. This demographic shift could stimulate job creation and economic growth, as younger visitors typically have different spending patterns and interests than older ones. Tourism flows may become more uniform, with less pronounced high seasons, as younger tourists tend to visit the region during the warmer summer months but not in winter. Consequently, new activity opportunities tailored to younger visitors need to be created. If older visitors decrease in number, businesses catering to this demographic might struggle. A

lower average age among visitors could impact the region's social dynamics, particularly if the number of older residents also declines. Language barriers may arise, as younger people often speak multiple languages, while older visitors typically know only one.

This scenario is likely a modestly positive one for Schleswig-Holstein's tourism sector. Given that Schleswig-Holstein would no longer need to account for global warming, funds earmarked for climate-related infrastructure improvements could be redirected to other facilities. Also, the tourism flows would not strain the region's capacities. Older tourists, still interested in the region and its history, would coexist with younger visitors flocking to coastal areas in the summer. Overall, factors such as health, hygiene, and wealth are likely to improve.

2.2.4 Points to be Acknowledged from the Scenarios of Schleswig-Holstein

Scenario 1: Modern Days

One method by which tourism companies can address these challenges is by investing in sustainable tourism practices. This might encompass initiatives such as waste and energy reduction, the promotion of local products and services, and support for conservation efforts. By emphasizing sustainability, tourism companies can attract younger travelers who are concerned about the environment and wish to make a positive impact.

Another strategy is to diversify the tourism industry by creating new products and services that cater to a broader range of travelers. Companies could, for example, offer cultural tours or food and wine experiences that highlight the region's history and traditions. They could also promote local activities and sports to attract younger tourists and partner with local communities and sports clubs to cultivate community-based tourism initiatives. These could support local economies and provide unique experiences for visitors.

To address the challenges the tourism industry in Central Europe is facing, it is essential for companies to collaborate with other stakeholders, such as local communities, government agencies, and environmental organizations. By working together, they can create sustainable tourism strategies that benefit both visitors and the environment.

Scenario 2: Old but Hot

To achieve this scenario, a variety of actions must be undertaken to mitigate the potential impacts of these trends. Adapting to the impacts of global warming necessitates the development of climate resilience. This could involve measures like improving coastal defenses, advocating for sustainable land use practices, and cultivating drought-resistant crops.

To attract and accommodate older tourists, it may be necessary to develop tourism offerings that cater to their needs and preferences. This could involve the development of cultural and historical attractions, the promotion of wellness and health tourism, and ensuring that tourist infrastructure is accessible and user-friendly.

Promoting sustainable tourism practices can help reduce the environmental and community impact of tourism. This could involve promoting low-carbon transport options, reducing waste, and supporting local businesses. As the average age of visitors increases, investment in healthcare and social welfare infrastructure to support their needs may become necessary. This could involve the development of specialized healthcare facilities, promotion of community engagement and social programs, and support for affordable housing options.

Encouraging economic diversity within the region can help ensure that businesses and communities are able to adapt to changing trends and preferences. This could involve promoting entrepreneurship, investing in education and training programs, and developing infrastructure to support emerging sectors.

Achieving the scenario where global warming continues and the average age of tourists increases will likely require a diverse set of actions to address the complex impacts of these trends. By investing in climate resilience, tailoring offerings to older visitors, promoting sustainability, investing in health and social care, and supporting economic diversity, it may be possible to create a more resilient and vibrant future for the Schleswig-Holstein region.

Scenario 3: Mission Impossible

Even though the probability for this scenario, Mission Impossible, is relatively low, it is still important to be aware of strategies to react properly, if this scenario becomes reality. Here we are going to have a younger audience and success in the climate change, which is why it slows down or even stops completely. Therefore, people are aware of sustainability which is highly valued in this specific scenario.

Firstly, it is important to focus on sustainable tourism by reducing carbon emissions, minimizing waste, and investing in renewable energy resources. Tourism companies should prioritize eco-travel in urban regions by building bike paths, hiking trails, and nature reserves. Public transportation should be a priority as well, as it is a more environmentally friendly option compared to cars and due to the green values of society more likely to be used. Furthermore, companies should invest in digital solutions and shift their marketing strategies towards social media to reach the younger audience. It is important for companies to shift their traditional offerings to match the new demand in tourism. For example, traditional beach vacations can be transformed into an opportunity to offer water sports and other activities that appeal to the younger audience such as beach volleyball. Moreover, companies can focus on creating tours that cater to specific interests such as music, food, beer and wine, or sports.

The beneficiaries of this scenario are local businesses and the economy in general, as the increased demand for tourism can result in a higher revenue and the creation of new jobs. Students and young people benefit from the scenario as well, as they have more options for vacation and can earn money through temporary work during high season.

Recommendations for organizations in the tourism industry would be to stay competitive by rethinking their offerings, investing in sustainable tourism and digital solutions, while prioritizing marketing towards the younger demographic on social media. Additionally, companies can build partnerships with local businesses to create new attractions and tours that appeal to the demographic. Overall, the key to success in this scenario is to adapt and focus on sustainable solutions while appealing to the changing trends in tourism.

Scenario 4: Flower Power

In order to reach the Flower Power scenario, a variety of actions should be taken. To stop global warming, it will be necessary to reduce greenhouse gas emissions. This can be done through measures such as transitioning to renewable energy sources, improving energy efficiency, and reducing waste. Encouraging sustainable tourism practices can help to reduce the impact of tourism on the environment and communities. This can include measures such as promoting low-carbon transport options, reducing waste, and supporting local businesses. To attract younger visitors, it may be necessary to diversify the types of tourism offerings in the region. This could include promoting adventure tourism, outdoor recreation, and cultural experiences that appeal to younger demographics. To support a more diverse tourism industry, it may be necessary to invest in education

and training programs that help to develop the skills and knowledge needed to work in different sectors of the tourism industry. Encouraging demographic diversity within the region can help to ensure that businesses and communities are able to adapt to changing trends and preferences. This can include measures such as promoting affordable housing, supporting community engagement, and investing in social infrastructure.

2.3 LITHUANIA, KLAIPEDA, CURONIAN SPIT

Daiva Labanauskaite & Eduardas Spiriajevas

2.3.1 Description of the Curonian spit and Presenting Its Market Situation

Curonian Spit is a 98 km long narrow peninsula with sand dunes. The northern part of the peninsula stretches 52 km and belongs to Lithuania. The area of the Lithuanian Curonian Spit peninsula is 180 km². The narrowest point of the peninsula is 380 m, and the widest point is 3.8 km. The most important settlements (from North to South): Smiltynė (part of Klaipėda city), Juodkrantė, Pervalka, Preila, Nida. Approximately 3,500 permanent residents live there. About 1,500 residents have purchased their property and live here periodically during the summer season in particular.



In 1991, the Curonian Spit National Park was established. In 2000, the territory of Curonian Spit was included in the UNESCO World Cultural Heritage List. Curonian Spit National Park is a national park in the west of Lithuania, and it covers the area of 264.74 km² (in land and waters). The land occupies 37 percent of the territory (70–74% of which are forests), the Curonian Lagoon borders the park from the east (16% of the park's area), and the Baltic Sea from the west (47% of the park's area). The park management is located in Nida. The Curonian Spit National Park stretches to the territory of Russia where a national park was established as well.

Only 1.5 percent of the territory of Curonian spit is assigned for the development of recreational potential. Therefore, the construction sector of this municipality will not be further developed and will remain more focused on the construction, renovation, or restoration of residential houses/recreational buildings.

Tourism and the provision of tourism-related services are one of the most important sources of livelihood for the residents of Neringa municipality (region). The distribution of operating economic entities according to types of economic activities indicates the business structure of Neringa municipality. The majority of companies operate in accommodation, catering, trade, and other service areas related to tourism. According to the types of economic activity, most economic entities operating in Neringa municipality are engaged in accommodation and catering activities, in total 26.3 percent of all operating SMEs.

Almost a third of the population (28.06 %) of Neringa's residents are engaged in economic activities after purchasing business licenses. According to the data of the State Tax Inspectorate, as of 01.02.2022, in the municipality of Neringa, in total 936 residents were engaged in economic activity after purchasing business licenses, which is 26 percent of all residents of Neringa region. According to the nature of the activity, about

60.5 percent of all residents work under a business license of rent of residential premises without providing accommodation services (rural tourism services or bed and breakfast services), and 13.6 percent provide accommodation services (bed and breakfast services).

The number of companies providing accommodation services increased by 33.3 percent, food and beverage services increased by 5.6 percent. In total, companies providing accommodation and catering services increased by 12.5 percent. In 2022, there were 484 operating economic entities (SMEs). In 10 years, the number of SMEs in the region increased by more than 4 times.

The Curonian Spit is mostly visited by local and international tourists, annually attracting 0.5–1 million tourists, including one-day visitors. The popularity of this region attracts new and returning tourists. Access to the region is very specific: from Klaipėda by ferry to the Curonian Spit. During the summer season, small boats from the Nemunas river delta to Nida, and from Dreverna to Juodkrantė across the Curonian Lagoon. About 6 percent of visitors arrive to Curonian Spit by waterways (small boats). The absolute majority come from Klaipėda by private cars, buses, and bicycles using the ferry services administered by AB "Smiltynės perkėla" (Smiltynė ferry line). According to the data of AB "Smiltynės perkėla", in 2018 – 2022, the flow of visitors transferred to the Curonian Spit increased by 20.5%. During the same period, the number of motor vehicles transferred decreased by 2.3 percent.

2.3.2 PESTE of Curonian Spit

Participants of the scenario workshop run by Klaipėda University prepared a summary of a PESTE analysis for Curonian Spit¹. The detected and named factors of PESTE analysis have been ranked according to their significance in the following order (1 – the most significant; as last number the least significant).

Table 5. PESTE analysis for Curonian Spit

POLITICAL FACTORS	
1.	Geopolitical tension in borderland of Curonian Spit and Curonian Lagoon region due to neighborhood of the Russian Federation.
2.	Sequence of strategic political actions to hold the status of the territory in UNESCO heritage list.
3.	Continuity of political strategic decisions in the development of general and tourism infrastructure in the territory of Neringa municipality.
4.	Annual increase of the fee for inbound tourists and daily visitors who arrive by private motorized transport vehicles.
5.	Close relations of international cooperation with neighboring countries, in particular with Germany and Poland.
6.	Since 2000, the Curonian Spit is inscribed on UNESCO World Heritage Site.
7.	Neringa municipality has the status of a resort.
8.	The status of the National Park guarantees the protection of the nature and of the cultural landscape.
9.	To create an advanced transportation system in the municipality, a strategic plan for sustainable mobility of Neringa municipality and a special plan for sustainable mobility in Neringa municipality have been prepared, according to which measures and actions are implemented to create a balanced, sustainable mobility system based on the use of efficient resources and modern technologies in the municipality.

¹ SWOT analysis has been compiled, using the Strategic plan for development of Neringa municipality for 2021–2030, https://neringa.lt/data/public/uploads/2021/12/d1_sppsantrauka.pdf

ECONOMIC FACTORS

1. Supply of sustainable goods and services created by local businesses.
2. Creation and elaboration of local business clusters.
3. Promotion to develop innovative business models for additional generation of revenues from tourism businesses.
4. Offer of sustainable and durable locally produced goods and services.
5. State support for local entrepreneurs in promotion to use green energy and other alternative sources of energy.
6. Nordic Culture Point scholarship.
7. Increase in economic wellbeing of locals.
8. A well-developed road infrastructure, a diverse offer of hospitality services, new tourism products, and routes are being developed, alternatives for adapting tourism resources to the needs of tourists and one-day visitors, niche tourism processes are being strengthened, and a tourism cluster is being developed.
9. COVID pandemic decreased the number of inbound tourists significantly. The domestic tourists are dominating now.
10. The unemployment rate in the municipality is low (4.1% in 2021) due to the high employment of the working-age population.
11. In the municipality of Neringa, the average monthly gross salary accounted for 86.03 percent of the national average.
12. If electricity and fuel become more expensive, the prices of other goods and services will increase, which will complicate the financial situation of companies and residents.
13. The unique attractiveness of Nida for water tourism due to the successfully operating port of Nida, the yearly increasing number of small boat owners and the offer of boat rentals for recreational sailing, due to passenger shipping from Kaunas, Šilutė, Dreverna and Klaipėda, travel by waterways to Neringa is becoming more popular every year.

SOCIAL FACTORS

1. Social activation and empowerment of local communities.
2. Increased mobility of local youngsters in selection activities and spots for leisure.
3. Increase of number of local inhabitants of young demographic age.
4. Social attractiveness of destinations for families with children.
5. Adaption of public and tourism infrastructure for disabled visitors.
6. Segregation of local social groups and communities.
7. The tendency of the population to increase is due to the acquisition of property (second home) in the municipality of Neringa, but the number of permanent residents is not increasing.
8. Residents migrate both to other municipalities and to foreign countries.
9. Positive trends are due to the low need for social services, which is caused by the absence of socially supported families.
10. The declining number of children and youth threatens the future with a shortage of human resources.

TECHNOLOGIC FACTORS

1. Rejuvenation of cycling pathways and their dependent infrastructure.
2. Adaption of sustainable mobility principles and development of infrastructure to promote alternative mobility means as pathways for pedestrians, spots to charge electro cars, bike sharing, and bike storage facilities.
3. Creation and offer of virtual services for tourists.
4. Introduction of integrated e-ticket to visit tourist objects.
5. The infrastructure of counting of parking places for private motorized vehicles.
6. Public outdoors cinema.
7. Mobile spots to charge mobile devices.
8. Electronic services for residents and legal entities are being expanded.
9. Technical services for the operation and maintenance of small and pleasure boats are provided in ports and marinas: quays with mooring equipment.

ENVIRONMENTAL FACTORS

1. Promotion to develop nature friendly local business models with reduced waste.
2. Improvement of infrastructure to facilitate ecotourism development.
3. Improve quality of drinking water.
4. Implementation solar panels as alternative source of energy.
5. Neringa Municipality, Lithuanian Yachting Union and Curonian Spit National Park administration signed a memorandum "NO to a plastic wave" in June 2019.
6. In protected areas, tourism is generally allowed, but there are environmental requirements, such as a ban on disembarking.
7. According to the decision of the Neringa Municipal Council, persons traveling only in electric vehicles are exempted from the local toll for entering Neringa, upon presentation of a vehicle registration certificate.

The scenario workshop teams proposed the strongest drivers for scenario development in a ten-year perspective. These were "Geopolitical tension in borderland of Curonian spit and Curonian lagoon region due to neighborhood of Russian Federation" and "Supply of sustainable goods and services created by local businesses".

2.3.3 FOUR scenarios for Curonian Spit

Scenario 1: Curfew

The Curfew scenario is created by the following conditions: increasing geopolitical tension in borderland of the Curonian Spit and the Curonian Lagoon region due to neighborhood of Russian Federation and non-growing supply of sustainable goods and services.

Short description of future vision

The Curfew scenario is developed by accepting the complex assumptions of the scenario development. Increasing geopolitical tension in borderland destroys the prospects of incoming tourism and the limited growth of supply of sustainable goods and services does not create the attractiveness of a tourist destination for responsible tourists who would dare to ignore the risks caused by political tension and make the decision to visit the region. In this scenario tourism processes become extensive with very limited economic-financial circulation. There would not be any inflow of international visitors due to war danger in Lithuania and the Baltic

countries, as the whole region would be considered as geopolitically insecure. The tourist region in borderland (Curonian Spit) loses its income from tourists and tourism businesses. Due to weakening local economy the locals lose their working places in the sphere of hospitality and in other services related to tourism economic branches. Borderland becomes unattractive for investors. Local inhabitants emigrate from the borderland and demographic aging is an ongoing process. Also, the offerings of tourism services are decreasing. The local businesses are shrinking and there are no alternative solutions to survive, there are no solutions based on sustainability principles. For those national visitors who arrive and stay in borderland, they consume local services which do not have proper features related to sustainability as local businesses interested to gain any kind of revenues not keeping the sustainability principles. Curonian Spit becomes unattractive both for international and national tourism.

After naming the likely course of events and consequences under the conditions of the Curfew scenario, the participants of the scenario workshop made a SWOT analysis of the perspective of tourism development.

Table 6. *Curfew SWOT*

STRENGTHS	WEAKNESSES
Favorable conditions for nature and culture recreation based on local resources, cultural values, and identities.	Demographic aging, loss of identities and values of local communities. Lost positions in tourism market. Economic and geopolitical instability. Brain drain of locals.
OPPORTUNITIES	THREATS
Possibility to reload tourism development concept in the region. Possibilities to introduce alternative decisions on tourism development based on small-scale sustainability principles.	Limitation to participate in modern tourism development processes. Limitation to use tourism innovations in local tourism businesses. Loss of trust in potential tourists to tourism services, and difficult regeneration of the previous tourist image.

Summarizing the insights presented in the SWOT analysis, it should be noted that this scenario is quite unfavorable for tourism development, as if erasing the achievements of several decades of tourism development and returning the region back several decades.

Scenario 2: Extreme Tourism

The Extreme tourism scenario is created by the following conditions: increasing geopolitical tension in borderland of the Curonian Spit and Curonian Lagoon region due to neighborhood of Russian Federation and growing supply of sustainable goods and services.

Short description of future vision

The scenario Extreme Tourism is composed in contradictory conditions. An increasing geopolitical tension in the borderland inhibits the growth of incoming tourism, but tourism entities in the region try not to give in

to unfavorable circumstances, follow international tourism trends and renew the supply of tourism services, introducing more of sustainable goods and services to the market. In this scenario tourism processes become extensive as foreign visitors do not plan trips there due to war danger and its affected risks of insecurity. The market of inbound tourists oriented to high comfort and quality of services is gone. The tourism business is likely to focus more and more on domestic visitors. In the meantime, local businesses pursue their activities towards sustainable development based on saving of local resources, increase diversification of local businesses and offer of goods and services to increase interest of potential visitors and tourists to visit Curonian Spit. A number of tourists oriented to sustainable tourism is rare. Short-term trips dominate. Local businesses and local institutions execute active marketing to promote sustainable use of local resources. In the case of this scenario, communication in the tourism market is of particular importance, which would help to effectively spread a positive content message about the possibilities of sustainable tourism in the Curonian Spit, which should be a counterweight to negative content information about the growing or still strong political tension in the region.

After naming the likely course of events and consequences under the conditions of the Extreme Tourism scenario, the participants of the scenario workshop made a SWOT analysis of the perspective of tourism development.

Table 7. Extreme Tourism SWOT

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> Creation and elaboration of innovative niche tourism businesses. New professionals entered and positioned into tourism market. The offer of tourism services and their value content are competitive and in line with international tourism trends. 	<ul style="list-style-type: none"> Decreased inflow of tourists. Lost position in tourism market. Economic and geopolitical instability.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> To develop sustainable tourism infrastructure. To promote educational activities in sustainable tourism propagation. Refocus on new tourist segments that are less sensitive to the emerging geopolitical situation. 	<ul style="list-style-type: none"> Decreased revenues from tourism. Commercialization of local cultural values as tangible and intangible heritage.

Summarizing the insights presented in the SWOT analysis, it should be noted that this scenario is quite challenging for tourism development. It demonstrates the resilience of the local tourism business and the entire tourism system, but the success of this scenario largely depends on the support of local tourism flows.

Scenario 3: Golden Age

The Golden Age scenario is created by the following conditions: decreasing geopolitical tension in borderland of the Curonian Spit and Curonian Lagoon region due to neighborhood of Russian Federation and growing supply of sustainable goods and services.

Short description of future vision

The Golden Age scenario means very favorable conditions and prospects for the development of tourism. Due to reduced inflow of tourists during the COVID-19 pandemic and effect of the war in Ukraine, internal tourism starts to recover and imply an increase of locally created sustainable tourism services, and services for leisure, investments to sustainable rejuvenation of infrastructure. Cooperation in the field of tourism is being revived with the southern part of the Curonian Spit belonging to the Kaliningrad region (Russia). This helps to renew the flow of tourists arriving through the Kaliningrad region. The region makes good use of its reputation as a UNESCO protected area and is rapidly restoring its competitiveness and position in the international tourism market. There is an ongoing segregation of niche tourism actions from mass tourism actions to retain the quality of environment, historic and cultural heritage. This is strengthening the competitiveness of the local tourism market and the region of (international) tourism market. Services and activities that attract visitors in all seasons are offered. The seasonality of tourism is decreasing.

After naming the likely course of events and consequences under the conditions of the Golden age scenario, the participants of the scenario workshop made a SWOT analysis of the perspective of tourism development.

Table 8. Golden Age SWOT

STRENGTHS	WEAKNESSES
<p>International cooperation in the field of tourism.</p> <p>Systematic approach towards sustainable tourism development.</p> <p>Niche tourism helps to reveal the uniqueness of the tourist destination and ensures the flow of loyal visitors.</p> <p>Recovering tourism does not increase the negative impact on the environment.</p> <p>Business and income opportunities increase the attractiveness of the region to local residents.</p>	<p>A need for investments and investments did not approach.</p> <p>Increasing consumption of local resources affected by increasing inflow of tourists.</p>
OPPORTUNITIES	THREATS
<p>To create sustained balance between nature protection and tourism.</p> <p>Possibilities to develop health tourism.</p> <p>Growing demand potential for tourism services.</p> <p>Opportunities to attract tourist segments with diverse interests are increasing.</p>	<p>Not implemented return of investments.</p> <p>Mismanaged flow of tourists and visitors.</p> <p>Effect of tourism seasonality with a lack of diverse services during the season and season off periods.</p>

Summarizing the insights presented in the SWOT analysis, it should be noted that this scenario is very optimistic and promising for the region. Recognizing the balance of interests and the principles of sustainability as a top priority is one of the prerequisites for the long-term success of this scenario.

Scenario 4: Stagnation

The Stagnation scenario is created by the following conditions: decreasing geopolitical tension in borderland of the Curonian Spit and Curonian Lagoon region due to neighborhood of Russian Federation and non-growing supply of sustainable goods and services.

Short description of future vision

The scenario Stagnation composes decreasing geopolitical tension in the borderland, which gives optimism, but the supply of sustainable goods and services is not growing. Only quantitative but not qualitative growth of tourism is observed. Business understands tourism only as a tool for generating income here and now. Tourism services are not improving, there are no innovations. Thereof tourism as a process is slightly recovering and revitalized. An activation of tourism branches is ongoing and maritime as well cruise tourism both are recovering and retake their positions on the international tourism market of West Lithuania. There is an ongoing appropriate growth in the quantity of tourism services, but the quality of services still remains without progress. Local entrepreneurs do not seek to implement sustainable solutions, and that affects the loss to be involved in progressively developing tourism markets where sustainability principles are the key principles in order to reveal uniqueness and attractions of the destination in borderland. The region does not exploit the uniqueness of its resources. Also, the risk factors of environment degradation are increasing.

After naming the likely course of events and consequences under the conditions of the Golden age scenario, the participants of the scenario workshop made a SWOT analysis of the perspective of tourism development.

Table 9. Stagnation SWOT

STRENGTHS	WEAKNESSES
Development and elaboration of local businesses without additional flow of investments. Increasing demand for tourism services. Better order and regulations on tax collection.	Degrading environment. A lack of qualitative growth. Potential of the region's peculiarities not used. International competitiveness of region in the field of tourism not succeeded. The region is losing tourism segments focused on value propositions. Deteriorating reputation as a tourist destination.
OPPORTUNITIES	THREATS
Possibilities to accumulate finances for investments.	Occurred damage to nature due irresponsible behavior of tourists and locals. Short-term blossom of tourism not oriented to long-term perspective. Loss of cultural identity. The threat of losing the status of a UNESCO protected area.

Summarizing the insights presented in the summary of the SWOT analysis, it should be noted that this scenario is very dangerous – the recovery of tourism that began after a period of stagnation in the development of tourism may mean an orientation only to short-term financial indicators and not to a long-term perspective of sustainability.

2.3.4 Points to be Acknowledged from the Scenarios for Curonian Spit

Scenario 1: Curfew

This scenario is completely unfavorable for the development of tourism. This is a scenario in which all activities in the Curonian spit seem to come to a standstill. The Curonian spit is disappearing from the lists of popular tourist destinations, giving up its position in the tourism market. Since tourism is the dominant activity that generates income for local residents, this course of events reduces the perspective of life in the Curonian Spit for locals. This is not an aspirational scenario. This scenario can only reduce the negative impact on the natural environment caused by tourism and other human activities. Since all development strategies of the Curonian Spit focus not only on the preservation of the natural environment, but demonstrate a holistic approach focused on the preservation and qualitative development of the entire ecosystem, this scenario cannot be treated as aspirational. Winners in the case of this scenario: other tourism destinations and tourism businesses in neighboring countries (Poland, Germany, Scandinavia). Losers: local inhabitants and local businesses, local municipal authorities, visitors interested in UNESCO heritage.

Recommendations for public institutions:

- to determine the possibilities to mitigate geopolitical negative impact on the security of the region
- to disseminate and propagate ideas and public decisions of promotion of sustainability in the region
- to enhance the regulations on simplification to run SMEs' businesses in the region
- to employ the uniqueness of nature as a tool of marketing to revitalize tourism in the region
- to compose agreements with educational institutions to attract the students for outbound study sessions pursuing to activate social life in the region.

In case of this scenario the businesses should: join the cluster and cooperate within, create, and elaborate new services, search for new markets, pursue to hold viability of the territory and attract visitors with different motives, promote development of alternative tourism businesses as complementarity to businesses related to tourism sector.

Scenario 2: Extreme Tourism

This scenario is quite extreme and contrary to the traditional model of tourism development. Winners in case of this scenario: interested once in extreme tourism who became motivated to travel as responsible tourists, innovative businesses which deal responsibly in relation to nature environment. Losers: once interested in mass tourism and lovers of comfort tourism, small and conservative businesses. The scenario is not what can be described as the aspiration of tourism developers, but it helps to get rid of excess tourism that is incompatible with the status of the Curonian Spit as a protected territory.

Recommendations for public institutions

- to incite innovations in local businesses and promote innovativeness of businesses
- to promote the development of sustainable businesses and durable services
- to develop innovative infrastructure
- education in potential markets in changed conditions of tourism environment
- redirection of visitors to the sources of reliable and trustworthy tourism and business information.

In case of this scenario the businesses should: enhance visiting objects for the need of extreme tourism, act in a sustainable way and consequently promote sustainability of local businesses and cooperate mutually in creation of common programs/ offers for visitors.

Scenario 3: Golden Age

This scenario opens up a lot of opportunities for the development of tourism. It is most in line with the strategic priorities and vision of tourism development. An important challenge is to control the situation so that sustainable tourism does not become expansive. Winners in case of this scenario are institutions interested in the protection of UNESCO heritage, local municipal authorities, authorities of Curonian Spit National Park, tourists, and private businesses. Losers are local businesses which are not oriented to accept innovations, changes, or sustainability principles.

Recommendations for public institutions:

- revitalization of cooperation project with neighboring countries
- to incite and popularize sustainable businesses and durable services
- to develop innovative infrastructure
- to solve the problems related to generation of green energy
- to involve visitors in popularization of local nature, history, culture values.

In case of this scenario the businesses should: participate in the model of circular economy, propagate local sustainable and durable services, cooperate mutually in creation of common programs/offers for visitors.

Scenario 4: Stagnation

This scenario represents the internal inertness and immaturity of tourism developers in the Curonian Spit. Tourism development is treated only as a source of income, rejecting the need for more sustainable services. This scenario does not fully meet the expectations of tourism development strategies and protected area status. This scenario should be avoided by educating tourism business representatives and strengthening cooperation between business and public institutions. Winners in case of this scenario: in short-term perspective private businesses, local municipal authorities (increased scopes of collecting taxes and fees). Losers: organizations of environmental protection.

Recommendations for public institutions

- to attract potential tourists from Poland actively
- to improve accessibility of the Curonian Spit during the tourism season by waterways from the mainland of Lithuania
- to develop the infrastructure of small marinas, recreational embankments and small quays for yachts and small vessels of internal waterways.

In case of this scenario the businesses should involve local businessmen in training course of sustainability implementation, assess the need for different types of small-scale investments, educated local businessmen on perception on tourism development based on the principles of sustainability, durability, and authenticity.

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2.4 POLAND, TORUŃ

Aranka Ignasiak-Szulc, Ewa Makowska & Barbara Józefowicz

2.4.1 Description of the Region of Toruń and Presenting the Market Situation

Toruń is a beautiful historical city located on the Vistula River in North Central Poland. As a medieval pearl its old city has been listed as UNESCO World Heritage Site since 1997. With around 200,00 inhabitants it is visited by approximately 2 million tourists each year. The most recognizable symbols associated with the city by tourists are gingerbread, the figure of Nicolaus Copernicus, the Panorama of the Old Town, and Radio Maryja.



Panorama of Toruń. Photo by A. Romanski. All rights reserved.

The tourists are attracted not only by the city's past visible in Gothic beauty, but also by modern attractions – numerous cultural and sports events like: [Bella Skyway Festival](#), [Energia CAMERIMAGE](#), [Tofifest](#) and many others located in modern infrastructure like [The Congress and Culture Centre Jordanki](#), [Centre of Contemporary Art](#) or the very modern speedway arena hosting Speedway Grand Prix and other events. In 2019 Toruń was considered as The European Capital of Sports by The European Capitals and Cities of Sport Federation (ACES Europe, Brussels). Every year there are approximately 180 sports events organized in Toruń at each level (also as world championships, for example World Masters Athletics Indoor Championships 2023 that attracted more than 4,000 participants).



Gothic Town Hall in Toruń. Photo by A. Romański. All rights reserved.



Szeroka Street during Bella Skyway Festival in Toruń. Photo by A. Romański. All rights reserved.

As a headquarter of conservative Roman Catholic media group including radio and tv stations (Radio Maryja and Telewizja Trwam) and place of other investments (as objects of worship, museum, media college and even geothermal exploitation) of charismatic Father aka Director Rydzyk, Toruń is an important pilgrimage center today.

The image of Toruń is shaped also by more than 20,000 energetic people studying here in several higher education institutions. Special attention must be given to Nicolaus Copernicus University that is one of ten leading research universities in Poland and owes its name to the most famous citizen of the city – a true Renaissance man, astronomer, and economist, born in Toruń in 1473.



The monument of Nicolaus Copernicus in Toruń. Photo by A. Romański. All rights reserved.

Toruń is situated at a major road junction, one of the most important ones in Poland with A1 highway, and has also a modern railway station. The nearest airport is located in Bydgoszcz, around 50 km from Toruń.

According to the monitoring of tourism that is conducted in Toruń, before the pandemic Toruń was visited by almost 2.5 million tourists a year, with the majority (80%) from domestic market. Most of the foreign tourists come from Germany. In 2021, according to data included in monitoring of tourism, the number of tourists dropped to 1.5 million tourists.

The number of companies providing accommodation services increased, according to the data of the Center of Tourism Information in Toruń. From 2021, the number of permanent operating year-round places exceeded 7,500 (in 2023 it should be more than 8,000), in more than 500 objects. The official data recorded by the Main Statistical Office of Poland (GUS) is much lower as the recorded increase in numbers is mostly connected with the increasing number of private flats rented as apartments for tourists, and this number

significantly grows year by year. On average 35% of offered places were taken. According to the portal Nocowanie.pl more than 44% of all searches for accommodation is based on Toruń (35% concerns the small resort town Ciechocinek, and 6.5% Bydgoszcz). Most of the tourists are one-day visitors (up to 40% of tourists stayed overnight). The number of overnight stays in Toruń recorded by GUS for 2022 was 313,185 persons and it was much better than for 2021 (208,538 persons), but the best number before pandemic (360,701 in 2018) was not yet reached. In 2022, 60% more foreigners stayed overnight compared to 2021.

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2.4.2 PESTE of Toruń

Participants of the scenario workshop prepared a summary of PESTE analysis for Toruń. Detected and named factors of PESTE analysis have been ranked according to their significance in the following order (as 1 – the most significant; as last number the least significant).

Table 10. PESTE analysis analysis for Toruń

POLITICAL FACTORS

1. Political instability in Poland (influencing the image of Poland which may result in decisions of foreign investors and tourists not to choose Poland as the destination of trip).
2. Introduction of tax restrictions and regulations regarding sustainable development to slow down climate change.
3. The emergence of a metropolis Bydgoszcz-Toruń.
4. The protracted war in Ukraine (and/or other international or border conflicts) which can create the feeling of insecurity in case of travelling to Poland.
5. Leaving the EU and the Schengen area or disputes of Poland with the EU resulting in limitations of the EU funds for Poland and regional operational program of the region.
6. Possibility of reduction in weekly working hours.
7. Lowering government support for tourism (for example, a tourist voucher for children's holidays – the amount of support depends on the number of children in the family or a program for organizing school trips).
8. Legal restrictions on the movement of people (COVID restrictions, lockdowns, etc.).
9. Limitations of possibility to rent private apartments (which are important in case of Toruń and their number is still growing).

ECONOMIC FACTORS

1. Decrease of real incomes.
2. Increase in electricity costs.
3. Increase in other costs related to transport and population movement.
4. Lack of competent employees on the labor market and lack of employees especially during the highest season.
5. Persistently high inflation rate.
6. Influx of immigrants for economic reasons.
7. Adoption of the Euro currency in Poland.
8. Reduction in the number of students, which will increase the number of vacant apartments for tourists (competition will reduce the price per night).
9. Increase in the unemployment rate.

SOCIAL FACTORS

1. An aging population.
2. Preferring rest in the nature by people of all ages which, in case of Toruń, means developing more green areas and areas on the Vistula River.
3. Increase in local tourism, within a region/province in the case of weekend trips or in the country in the case of holiday trips (Poles travelling in Poland).
4. Increase in ecological awareness and changes in life/work balance (veganism, healthy lifestyle, choice of more balanced lifestyle).
5. Medical tourism development (spa, health resorts).
6. Tendency to participate in trips focused on spiritual development, meditation trips, retreats, religious trips; pilgrimages are becoming popular.
7. Younger generations of travelers are more and more influenced by social media and pop culture.
8. Growing importance of virtual reality as a factor inspiring travel choice of tourists.
9. Increase in the number of pensioners using tourist attractions and health resorts.
10. The introduction of the four-day workweek and remote work will increase the mobility of employees (digital nomads).
11. Food-driven travel is growing in popularity and Poland is known for very good and still traditional cuisine, high position of Polish dishes in the world rankings (for example żurek – the soup from the Kujawsko-Pomorskie Region was selected the second-best soup according to tasteatlas.com).

TECHNOLOGIC FACTORS

1. Digitization of tourist services (and the need for their commercialization).
2. Popularity of electronic payments and other remote services will force introducing e-tickets, tourism city cards, etc. (in Toruń it so far quite limited so there is a need for actions targeted for integration of actions of local stakeholders).
3. Alternative ecological transport (development of public transport, scooters, bicycle paths), especially important in the city center.
4. AR, VR, AI (artificial intelligence, etc.), introducing smart city system.
5. Development of transport infrastructure (railway stations, road network development), also linking different means of transport like railway/local transport to city center.
6. The increase in the importance of the airport in Bydgoszcz, located 50 km from Toruń, will increase the number of foreign tourists in Toruń.
7. New trends in the hotel industry (capsule hotels).
8. Launching a central communication port what can influence tourism in the Kujawsko-Pomorskie Province as there will be direct link (highway, train).

ENVIRONMENTAL FACTORS

1. Climate change, global warming and its effects will result also in local actions (in case of Toruń, e.g., and incentives to park outside the city center).
2. Decreasing water level in rivers (difficulty for water sports and river transport) – low water level in the Vistula River and increasing temperature (Institute of Meteorology and Water Management – National Research Institute), causes poorer environmental quality and problems with the use of the river for tourist purposes (cruise boat trips, canoeing, fishing).
3. Smog causes the need to increase the coordination of activities and cooperation of entities to improve air quality.
4. Dominance of power plants from renewable sources (wind, water, etc.).
5. Reduction of freshwater resources.

2.4.3 Four Scenarios for Toruń

Scenario 1: No Wind of Change

This scenario was based on two factors: high political instability and an aging population.

Short description of the future

In this scenario, both factors pose a major challenge to the development of the tourism market. High political instability makes it necessary to quickly adapt to changing conditions: political, economic, and legal. In particular, changes in tax regulations are particularly painful from the point of view of running a business. They are actually a limiting factor for development. Entrepreneurs show far-reaching caution in making long-term investment decisions, fearing rapid changes in regulations. The political instability is a factor limiting the arrival of tourists from abroad, the development of the touristic market must rely more on domestic tourists, most of them being older people.

Table 11. *No Wind of Change SWOT*

STRENGTHS	WEAKNESSES
<p>Toruń has an attractive offer of traditionally furnished tourist facilities, e.g. The Nicolaus Copernicus' House, Ethnographic Museum, The Old Town Hall, and the Old Town Hall Tower.</p> <p>Numerous restaurants and bars providing Polish cuisine, e.g., dumplings, craft brewery, creperies, attract tourists.</p> <p>Toruń is a pilgrimage city with a developed and still developing infrastructure, prepared for religious travel, as well as trips based on history and national values.</p> <p>Not far from Toruń, Ciechocinek, Inowrocław, and Wieniec have an infrastructure for health tourism having the opportunity to receive tourists staying for short trips in these resorts.</p>	<p>Insufficient infrastructure for people with mobility limitations, lack of amenities in some facilities, e.g., no possibility to use elevators in historic buildings (Old Town under UNESCO protection).</p> <p>Political instability may translate into lower tax revenues and, therefore, a lack of funds to finance new investments and improvements to existing infrastructure.</p> <p>Older people in Poland have still low purchase parity so their spendings as tourists are limited.</p>
OPPORTUNITIES	THREATS
<p>An older customer is more predictable, more conservative, used to traditional tourist solutions, traditional cuisine, and traditional forms of customer service.</p> <p>Less seasonality, less pressure to use modern technologies.</p>	<p>Returns of the pandemic resulting in lockdowns.</p> <p>An older client hinders the introduction of modern, more sustainable solutions in the field of e.g., electronic ticketing, AI support, waste segregation, etc.</p> <p>The conservatism and caution prevailing in the older generation may slow down the process of implementing new tourist services.</p>

Considering the second factor, that is, the aging population, it can be said that Toruń, as a city on the UNESCO list, is very well suited to the expectations of this type of tourist, who is rather a traditionalist and expects traditional solutions in the field of tourist services. Toruń's monuments, beautiful Old Town, and numerous restaurants offering traditional Polish cuisine may attract tourists to Toruń practically at any time of the year.

The Catholic part of Polish society (about 84% of Poles were baptized according to the Central Statistical Office data for 2021) visits the radio station Radio Maryja, which is located in Toruń, known throughout the country and Shrine of Our Lady Star of the New Evangelization and Saint John Paul II in Toruń. Particular interest in religious tourism can be observed especially among the elderly. In such a future scenario, the demand for the organization of religious trips and pilgrimages will grow.

Scenario 2: The Good Old Days

This scenario was created based on two factors: political stability in the country and an aging population.

Short description of the future

In this scenario, the first factor, which is political stability in the country, is a positive factor from the point of view of the development of broadly understood entrepreneurship, including the development of the tourism industry. Political stability in the country is equated by entrepreneurs with stable operating conditions for

enterprises. In business, this means no revolutionary changes in tax regulations, stable economic growth, inflation, and unemployment rates at a stable, rather low level. Therefore, these are very good conditions for the development of entrepreneurship, including undertaking new investments and creating bold plans for the future.

The country is open for tourists from abroad as Poland is seen as a stable, reliable, more and more developed country with lower prices, making it an attractive market for health tourism.

Table 12. *The Good Old Days SWOT*

STRENGTHS	WEAKNESSES
<p>Toruń has an attractive offer of traditionally furnished tourist facilities, e.g. The Nicolaus Copernicus' House, Ethnographic Museum, The Old Town Hall, and the Old Town Hall Tower.</p> <p>Numerous restaurants and bars providing Polish cuisine, e.g., dumplings, craft brewery, creperies, attract tourists.</p> <p>Qualitatively diverse and very capacious accommodation base.</p> <p>A stable political situation means an increase in tax revenues, which will translate into increased possibilities of financing new projects or adapting the existing ones to the needs of the elderly.</p> <p>The infrastructure for health tourism in the neighboring area of Toruń gives opportunity for receiving trips of tourists staying in these resorts, also from abroad with higher purchasing power.</p>	<p>Insufficient infrastructure for people with mobility limitations, lack of amenities in some facilities, e.g., no possibility to use elevators in historic buildings (Old Town under UNESCO protection).</p>
OPPORTUNITIES	THREATS
<p>An older client has a greater social role and being in a group of peers.</p> <p>Development of spa, sanatorium, and medical tourism.</p> <p>Wellbeing and health tourism.</p> <p>Toruń with an expertise with organizing World Masters Athletics Indoor Championships (2023) can become a center for sports events targeted to masters.</p>	<p>The conservatism and caution prevailing in the older generation may slow down the process of implementing new tourist services.</p> <p>An aging population may mean a lack of people willing to work, especially when the current employees retire.</p>

However, considering the second factor, i.e., the aging society, the development of the tourism industry should be of a specific nature. Older customers, due to their age and a rather traditional approach to tourism, pose a challenge to broadly understood tourism in many respects. Therefore, new investments undertaken by local authorities should primarily consider the wellbeing of older people and their needs, preferences, and tastes.

Scenario 3: Tough Start

This scenario was based on two factors: high political instability and positive birth rate.

Short description of the future

High political instability has a negative impact on the development of entrepreneurship in the country and in the region. Therefore, decisions made by enterprises from the tourism industry will be focused on maintaining the existing market and tourist base. On the other hand, a positive birth rate means an increase in the number of young tourists, often with small children, and, therefore, looking for an interesting offer for the youngest. It is also an opportunity to activate older people who have grandchildren for family trips together which is still very popular in Poland. In such conditions, rest in the nature or a combination of active sightseeing and relaxation will be preferable. It also means an increase in weekend trips, when parents have time to spend time with their children and take advantage of the event offer offered by the city.

Table 13. Tough Start SWOT

STRENGTHS	WEAKNESSES
<p>High recognition of the tourism brand of Toruń.</p> <p>Qualitative differentiation and high accommodation capacity.</p> <p>Good transport accessibility, possibility of getting to the city center by bus and train.</p> <p>High potential for the meetings industry (conferences, other events).</p> <p>Qualitatively diverse and very capacious accommodation base, including apartments/flats that are very often rented by families with children.</p> <p>More school groups.</p> <p>Authorities of the city promote it among bloggers and influencers which can result in attracting more young tourists.</p>	<p>Concentration of tourist traffic in the Old Town complex (Old Town).</p> <p>Predominance of tourists with one-day or weekend stays.</p> <p>Insufficient use of green spaces for tourists and recreational purposes.</p> <p>The lack of a stable political situation may mean reduced tax revenues, which will translate into fewer opportunities to finance new projects and the need to reorganize the cultural and tourist offers.</p> <p>Toruń may have an image as a place for older people which can limit the arrival of younger tourists; because of the political situation the arrival of tourists from abroad is limited.</p>
OPPORTUNITIES	THREATS
<p>Young customers are more likely to participate in organized cultural and sports events, etc., and Toruń has the infrastructure for that kind of events.</p> <p>Development of the tourism market with the use of the meetings industry.</p> <p>Development of tourism related to local historical events and historical objects such as forts, fortifications, castles.</p> <p>Consensus of residents and local stakeholders of the tourism industry consisting in the acceptance by each stakeholder group of the possibility of resigning from some of their own benefits in favor of the common values of the city.</p>	<p>Return of the pandemic resulting in lockdowns.</p> <p>Decreased demand for events, including in the meetings industry.</p> <p>Competitiveness of other cities as centers of urban and cultural tourism and the meetings industry.</p> <p>Divergent interests of local tourism industry stakeholders, visitors, and residents of the city (e.g., issues of short-term rental, parking policy).</p>

Scenario 4: Wonderland

This scenario was based on two factors: political stability and positive birth rate.

Short description of the future

Taking into account the positive birth rate, the society will be younger and younger. On the other hand, a stable political situation in the country will create favorable conditions for the economy. In such a situation, the young generation will have ideal conditions for self-development and development of entrepreneurship. Contrary to appearances, this is the most unpredictable scenario because it is difficult to determine what young people will bet on. What social changes will occur in the near future? Considering the fact that young people declare care for the natural environment and sustainable development, their future efforts should focus on activities aimed at the wellbeing of the natural environment.

Table 14. Wonderland SWOT

STRENGTHS	WEAKNESSES
<p>High recognition of the tourism brand of Toruń.</p> <p>Qualitative diversification and high value of the accommodation base.</p> <p>Good transport accessibility, possibility of getting to the city center by bus and train.</p> <p>High potential for the meetings industry (conferences, other events).</p> <p>Varied quality and very capacious accommodation base, including apartments/flats that are very often rented by families with children.</p> <p>A stable political situation means the impact translating into an increase in financing opportunities for new projects or those already visible for the needs of young people.</p> <p>More school groups.</p> <p>Authorities of the city promote it among bloggers and influencers what can result in attracting more young tourists.</p>	<p>Concentration of tourist traffic in the Old Town complex.</p> <p>Predominance of tourists with one-day or weekend stays.</p> <p>Insufficient use of green spaces for tourists and recreational purposes.</p>
OPPORTUNITIES	THREATS
<p>Young customers are more likely to participate in organized cultural and sports events, etc., and Toruń has infrastructure for that kind of events.</p> <p>Development of the tourism market with the use of the meetings industry.</p> <p>Development of tourism related to local historical events and historical objects such as forts, fortifications, fortifications, castles.</p> <p>Creative changes in business models in the tourism market, investments in modern technologies.</p>	<p>Unfavorable reception of the touristic offer related to the possible deterioration of the functioning of the tourism and tourism-related economy (e.g., high prices, lower quality of services).</p> <p>Competitiveness of other cities as centers of urban and cultural tourism and the meetings industry.</p>

2.4.4 Points to be Acknowledged from the Scenarios for Toruń

Scenario 1: No Wind of Change

Recommendations for public institutions:

- Development of infrastructure adapted for people with mobility limitations and visually impaired people, e.g., ramps for people in wheelchairs, facilities for the blind and visually impaired and deaf people.
- Preparation of appropriate transport for the elderly and disabled.
- Designating more parking spaces for tour buses, which most often serve school trips and retirees.

In case of this scenario the businesses should:

- Introduce facilities for the disabled, e.g., ramps for people in wheelchairs, facilities for the blind and visually impaired, and the deaf.
- Travel agents, in partnership with others, should offer additional services to religious tourists and pilgrims who visit the Shrine of Our Lady Star of the New Evangelization and Saint John Paul II. Especially group trips for pensioners, for whom it is worth organizing a longer stay in Toruń so that other actors in the tourism sector in Toruń also benefit from it.

Scenario 2: The Good Old Days

Recommendations for public institutions:

- The increase in tax revenues can be allocated to the implementation of investments, the implementation of which should consider the wellbeing of the elderly and their needs, preferences, and tastes.
- Support for the development of local gastronomy, which is preferred by the elderly.
- Development of infrastructure adapted to people with mobility limitations and the visually impaired.
- Preparation of appropriate transport for the elderly and disabled.
- Designating more parking spaces for tour buses, which most often serve school trips and retirees.
- Expanding the offer of organized cultural events with those that will be attractive to older people, e.g., related to historical events, traditional cuisine or taking care of health or well-being.

In case of this scenario the businesses should:

- Introduce facilities for the disabled, e.g., ramps for people in wheelchairs, facilities for the blind and visually impaired, and the deaf.
- Travel agencies in cooperation with other entities should offer additional services for tourists interested in spa and medical tourism.

Scenario 3: Tough start

Recommendations for public institutions:

- Expanding the offer of organized events with those that will be attractive to young people, e.g., related to historical, sports events, etc.
- Development of the tourist market with the use of the meetings industry.
- Preparation of appropriate urban transport infrastructure used by young people, increasing the number of bicycle paths, availability of bicycles and city scooters.
- Use of green spaces and attractive city boulevards for tourist and recreational purposes, construction of benches and sheds in parks and green areas, pedestrian paths.

In case of this scenario the businesses should:

- Introduce facilities for young people with children, such as a feeding place for a mother and child, ramps for prams, toilets adapted for children.
- Preparation of an attractive offer for children and teenagers in the form of workshops, city games, play corners for the youngest.

Scenario 4: Wonderworld

Recommendations for public institutions:

- Renovation of objects such as fortifications and forts and adapting them for visitors.
- Making the offer of existing military facilities more attractive with interactive exhibitions and the possibility of active sightseeing.
- Expanding the offer of organized events with those that will be attractive to young people, e.g., related to historical, sports events, etc., and development of the tourist market with the use of the meetings industry.
- Expanding the city's infrastructure offer with new sports facilities, places for organizing meetings and events, facilities intended for broadly understood mass culture, such as concert halls, sports, and entertainment halls.
- The use of green spaces and attractive city boulevards for tourist and recreational purposes.

In case of this scenario the businesses should:

- Introduce facilities for young people with children, such as a feeding place for a mother and child, ramps for prams, toilets adapted for children, construction of playgrounds and play corners for children.
- Adapting the tourist offer to the expectations of young people. Enrichment of existing solutions with interactive exhibitions, using VR and artificial intelligence.
- Introducing and continuation the digitization of tourist services.
- Gastronomic establishments should adapt their offer to the growing ecological awareness of young people (veganism, healthy lifestyle, choosing a more sustainable offer).

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2.5 SPAIN, GRANADA

José Alberto Castañeda García & Rodrigo Martín-Rojas

2.5.1 Description of the Region of Granada and Presenting the Market Situation

Granada, located in the autonomous community of Andalusia, one of the most visited regions in Spain, has been for many years a top visited city in the country. Every year, since the economic crisis emerged in 2010, the Granadan tourism breaks a new record in the industry, the exponential growth the city has experimented has led to a 59.6% increase in the number of visitors as well as a 48.8% increase in overnight stays, turning Granada into a largely tourism-based economic city.

In 2019, before the pandemic, the hotel industry in the province was integrated by 6,491 different types of tourism accommodation with 86,699 places offered, which places Granada in the third position in the number of establishments, after Malaga and Cadiz, in the context of the Andalusian region.

As is well-known for Spaniards, Granada has a young, cheerful, and active lifestyle. Full of students, this city lodges an enormous amount of bright people that come from all over the country to flourish in its prestigious university. Even though this is the general feeling, when considering the population of the whole province, one can see the most common age gap being between 40 and 54, making this destination a wonderful space for anyone that is interested in coming. Even the fact that 7% of the inhabitants are foreigners makes it clear how open-minded people are when getting in touch with other cultures and how warm the welcome is when you get here.

However, all this growth achieved in the last two decades suddenly stopped when the pandemic hit; in fact, Granada was one of the most affected provinces of Spain economically speaking due to the severe restrictions imposed by the government in 2020 and the main part of 2021 to help prevent the spread of the virus. The limitation of mobility through Spanish municipalities and international connections, the total shutdown of bars, restaurants, pubs, clubs, or any type of leisure companies put many businesses on hold, especially small and medium-sized businesses in the service industry.

The cultural richness of this city is one to be envious about. Every landscape is filled with natural wealth and architectural work from the old Granadan kingdom. At any square one can enjoy a live folkloric show, having an exciting time while eating tapas and drinking beer. Visiting the Alhambra is a once in a lifetime experience that will make one acknowledge the power Al-Andalus had in the past. All of these major offerings can be found under one of Europe's best weathers. Unique and authentic experiences await anyone visiting this magical destination.



Granada has countless resources that make it a first-class tourist destination, and it is important to highlight the great importance of its natural park Sierra Nevada, which was declared as a “Biosphere Reserve” by UNESCO in 1986. Moreover, it is the most visited ski resort in Spain.

Granada is a city that has decided to progressively transform its tourism model towards sustainability, promoting respect for the environment and heritage conservation, based on the pillars of the General Plan of Sustainable Tourism of Andalusia Horizon 2020. However, environmental awareness must be increased, which can pose a threat to the maintenance of a high level of environmental quality.

2.5.2 PESTE of Granada

Political factors

In recent years the Workers’ Commissions Union and many political parties have shown their concern about the rapid alteration of wealth creation ambivalence and the high rate of job insecurity. This is especially concerning as the seasonality of expenditure sets every year more often the health of the labor market in tourism focused destinations such as Granada.

Due to these factors, Granada has reached out for the help from both the Autonomic and National government in the shape of grants, to improve the stability of the stakeholders involved in the sector, and mostly large inversions from several tourism plans promoted mainly by the Junta de Andalucía (Governing body in the Andalusian region) and the Provincial Federation of Hostelry and Tourism Enterprises. Since their first major capital injection of over 6 million euros in 2005, multiple policies and programs have invested large amounts of money in funding tourism activities over the years. Thanks to the application of these aids, many goals have been achieved, but there are others expected to be accomplished in the near future, too, such as the construction of high-speed lines as well as road connections for the sake of improving communication with other municipalities, or the expansion of Granada’s metro to the outskirts of the city.

During the pandemic, the forced closure of businesses reduced the average profit by 60%. The country's SMEs' businessmen were terrified of the economic crisis that COVID-19 had brought along, and they begged the Spanish government for subsidies or tax rebates, which is the reason why the government has distributed over 755.000 ERTES (temporary layoffs) with the intention to save as many jobs from declaiming as possible.

Economic factors

The data of the average daily expenditure of tourists in the framework of the Tourism Survey of the Observatory are €76.22, while hikers spend on average daily €34.94. The total number of travelers who make use of the offer in the province of Granada regulated accommodation has been 1,107,874 in 2020, which has meant an enormous decrease, of 70.1%, which breaks the series of two consecutive years of growth in 2018 and 2019.

The total overnight stays of travelers in the regulated offer of accommodation in the province amounts to 2,357,958, so that the decrease in the same with respect to 2019 (69.8% in variation rate) represents 5,454,449 nights less, a decrease very similar to the decrease experienced in the number of travelers.

As of the Spanish provinces with the highest unemployment rate in the 4th quarter 2021, Granada is located in the 4th place with 20.35% and the main reason in total numbers is the destruction of employment in the service sector.

The Consumer Price Index (CPI) rose 3% in March compared to the previous month and suddenly raised its year-on-year rate by more than two points, to 9.8%, its highest value in 37 years, specifically since May of 1985, according to the final data published by the National Institute of Statistics (INE). According to the INE, the year-on-year rise in the CPI to 9.8% is due to the rise in the prices of electricity and diesel for heating; the increase in fuel prices for personal vehicles; the increase in the prices of restaurants and lodging services, and the generalized increase in food prices.

Social and Cultural Factors

Andalusia accounts for 17% of Spain's surface area, it is the second widest autonomous community and the most populated one, having around 8,500,000 people living there. Entering the topmost populated cities inside Andalusia, Granada's population gets up to 231,775, suffering a ridiculously small decline during the last years. This means a fourth of the Granada's province inhabitants (around 930,000 people) live in the city, reflecting its importance and impact. After seeing no big demographic changes on the data currently, Granada will fight to remain standing as one of the most relevant cities in Spain in the future.

Since the appearance of COVID-19, two years ago, this city was empty for a long time. One had to stay at home for months, all hospitality was shut down. Even when people thought they were getting better, they did not. It really made a change in how they value their leisure time, and it made them realize that it is needed for a lot of people's mental health. But this tragedy has come to an end, and now once again the city is shining as it used to do. In spring 2023, the main stakeholders of Granada signed a great strategic alliance, with the main objective of getting back the economic power they had in the past. To achieve this goal, they will work for a green environment, develop the production model, modernize the tourism sector and fight against structural poverty, amongst other actions.

Technological Factors

In Granada, both the Provincial Tourism Board and the Andalusian Tourism Board are active on their social media accounts, where they engage digitally with the travelers and share tourist information and all the latest developments in the travel and tourism industry. Thanks to the collaboration between the startup Aumentur

and the mobile app initiative Turismo Andaluz, which was announced during the 2021 International Tourism Fair FITUR, tourists will soon be able to access information on 462 towns in Andalusia and a total of 2,251 points of interest available in four languages.

TurinGranada is the name of the project that will turn this Andalusian province into a smart tourist destination (STD) counting on the Portuguese company Ubiwhere's participation, for this purpose.

The use of artificial intelligence (AI), as well as augmented (AR) and virtual reality (VR) technologies, within the travel industry is still a relatively recent development and, as a result, their new uses in the city are emerging all the time. Years ago, Telefonica Foundation and Patronato of Alhambra and Generalife created a 3D virtual recreation of the Alhambra, which includes the digitization of the fortress of the Alhambra palaces and the Generalife gardens allowing the tour of the interior and exterior of buildings. Fast-forward to 2021, AI Lab Granada was created as the result of the efforts of the University of Granada, Indra, and Google Cloud to make Granada and the PTS Foundation a leading space in research and knowledge transfer. The Center that has more than 100 PhDs in AI and 165 consultants, developers, and researchers and an ecosystem of startups and entrepreneurs, will develop artificial intelligence solutions that will increase the efficiency and sustainability of businesses, public administration, and society. Moreover, the mobility restrictions due to the pandemic and the introduction of a series of ambitious projects made for a great opportunity for VR and AR startups to emerge in Granada, e.g., Walkitect and Past View.

Lastly, Granada Human Smart City is one of the initiatives of the National Plan of Intelligent Cities promoted by Red.es, one of the pioneering public entities in the promotion and implementation of the smart city concept in Spain. The project aims to make the Albaicín neighborhood universally accessible for all people regardless of their physical condition, age, or place of origin as well as the promotion and accessibility of cultural heritage and the promotion of smart and sustainable tourism, using innovative, integrated, and efficient information technologies.

Environmental Factors

However, several factors could affect the influx of tourists to the mountains and their natural preservation. The great boom of this natural park produces a massification especially in winter, decreasing considerably in summer, which indicates that tourism in Granada becomes overcrowded and seasonal.

Moreover, according to recent studies carried out by the State Meteorological Agency (AEMET, published in the AdapteCCa platform of the Ministry for Ecological Transition), different climate projections have been made that expose the evolution of the climate throughout this century. It has been discovered how the maximum temperature is expected to increase between 2 and 5°C. In the case of rainfall, however, we can observe a tendency to decrease the level of available water. Therefore, an increase in temperatures will be expected causing an impact on the urban climate which leads to a loss of tourist attraction in the warmer months of the year. Also, a possible reduction of the ski season in Sierra Nevada can happen due to the lack of snow.

In addition, the decrease in rainfall would affect urban tourism because it would reduce the amount of water available and put at risk many touristic resources such as aljibes. Also, the city landscape, could be adversely affected by an increase of desertification.

Finally, it is worth mentioning that Granada is the third city with the most polluted air in Spain. This situation must be solved as soon as possible, by investing in better management of CO₂ emissions from public transport and with sustainability plans for urban and tourism mobility.

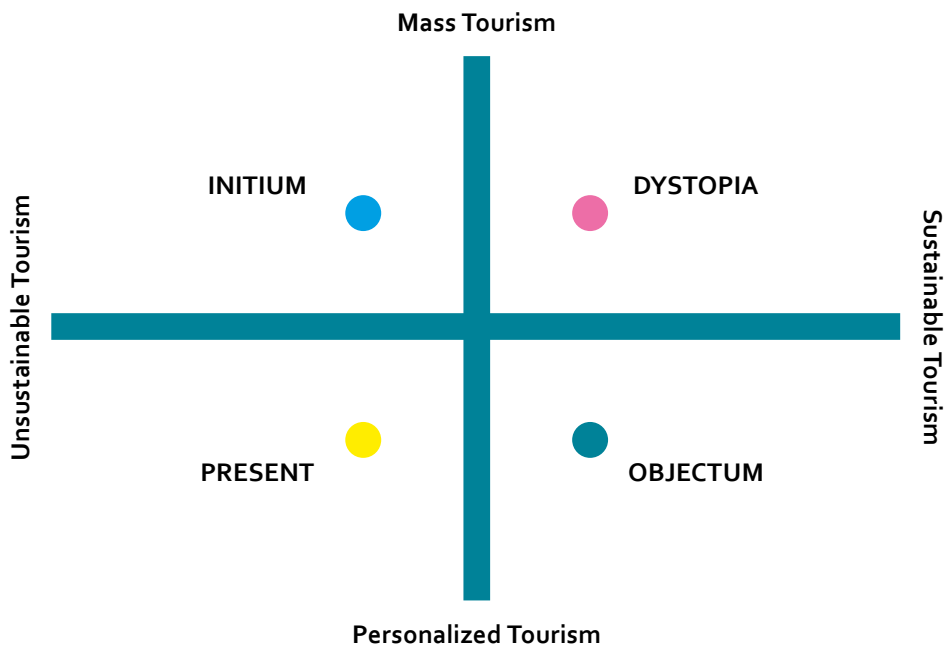
2.5.3 FOUR Scenarios for Granada

Megatrends:

Sustainable tourism is key to addressing the potentially damaging impacts associated with uncontrolled tourism growth, environmental problems, greenhouse gas emissions or excessive water use. In addition, tourism is also highly susceptible to the impacts of climate change, so if tourism adds sustainable development principles, it can play a key role in driving the transition to a low-carbon, resource-efficient economy.

Mass tourism tenders a general customer experience, without focusing on the customer's preferences. Nowadays, it is becoming an increasingly critical issue, especially for the most popular tourist destinations. It is an ongoing challenge for the tourism industry as well as policy makers to devise solutions to this problem to protect the local's quality of life and ensure sustainability. Due to this problem, destinations like coral reefs or popular coast regions have deteriorated. For this reason, governments have approved measures to reduce negative effects of overtourism, for example, in the Netherlands, local governments offer various methods of transportation to explore different regions, and so, they can encourage broader regional travel rather than maintaining a high level of tourism in big cities.

Personalized tourism is growing due to the rise of new technologies, especially artificial intelligence and data analytics. Contrary to mass tourism, which offers a general experience for customer, personalized tourism tenders experiences based on personal preferences, and diverse needs of travelers from different countries, age groups, and cultures.



Graph 2. Scenarios for Granada

Scenario 1: Objectum

The Objectum scenario is created using sustainable tourism and personalized tourism megatrends.

In this scenario, your offer is reduced, and to begin to implement a sustainable model requires a high level of investment, so at the beginning it is difficult to get profit. Despite this, and due to the rise of sustainable tourism, you can attract specific customers. Moreover, by focusing on offering personalized experiences, you could gain a good position in this market niche. With this position, you could improve regional or local tourism, you could bet on promoting local products or services that are not so well known nationally or internationally.

On the other hand, companies must be attentive to possible changes in preferences, because their profits depend on a specific niche, and they have to adapt to the preferences of their customers. This way, the experience will remain personalized and satisfactory experience.

Table 15. *Objectum SWOT*

STRENGTHS	WEAKNESSES
<p>It does not cause environmental, social, or economic damage.</p> <p>The offer is adaptable to the needs of the tourist given its personalized character.</p>	<p>More difficult to make a profit.</p> <p>High cost when starting sustainability.</p>
OPPORTUNITIES	THREATS
<p>Address a market niche.</p> <p>Use local products.</p>	<p>Change in customer's preferences and ideas.</p> <p>Increase in prices of sustainable products/ services.</p>

Scenario 2: Initium

The Initium scenario is created using unsustainable tourism and mass tourism megatrends.

In this scenario, it is possible to get a large number of profits, because there is no need to invest in sustainability, and you probably have a great demand for products or services. As a result, these profits could be invested in improving the company with the certainty of being able to recover this investment. With this investment, the companies could check if new products or services are working in their market or other opportunities to improve the company.

Principally, there are two negative parts: first, the companies depend on the seasonality. This means that it could happen that in several months of the year, there is not a great demand of customers, so, companies may have to consider shutting down during this period. Second, excessive use of resources without keeping in mind a sustainable standard could cause environmental, social, or economic damage.

Table 16. *Initium SWOT*

STRENGTHS	WEAKNESSES
Short-term economic benefits. Low cost to start.	Exceeds the carrying capacity of the environment and damages resources. Can depend on the seasonality.
OPPORTUNITIES	THREATS
Check new services. Reverse profits with less risk.	Change in the seasonality. Competitors are continuously improving.

Scenario 3: Dystopia

The Dystopia scenario is created using sustainable tourism and mass tourism megatrends.

This scenario is difficult to see in real life, so it uses two megatrends with opposite concepts. The reason for this is that it is difficult to develop the concept of sustainability by focusing on a model that tries to saturate the available resources to the maximum without considering any area of sustainability.

As mass tourism, there are a lot of competitors, and if you want to maintain a good position in the sector, you have to offer attractive products or services. As this is a sustainable area, even if it focuses on mass tourism, the damage caused would be less than in another scenario focused on unsustainable tourism.

One could highlight that the possibility of achieving great profits and knowing that next year similar results will probably be obtained, companies could reserve these profits in improving their areas of sustainability.

Table 17. *Dystopia SWOT*

STRENGTHS	WEAKNESSES
It would not be harmful to the environment or society. High profits.	They are not compatible because exceeding the carrying capacity damages available tourism resources. A lot of competitors.
OPPORTUNITIES	THREATS
Reserve profits with less risk. Expand your business.	Change of seasonality

Scenario 4: Present

The Present scenario is created using unsustainable tourism and personalized tourism megatrends.

This scenario is very customer oriented, as it focuses on delivering personalized experiences without keep in mind any aspect of sustainability. For this reason, profits can be invested to improve the customer experience, consolidate that market niche, or attract another niche. But, if customers' preferences change, companies have to adapt to new needs of the customers.

As this scenario is not focused on sustainability, it avoids the high start-up cost of sustainability, but on the other hand, it might cause negative effects in the environment or society.

Table 18. Present SWOT

STRENGTHS	WEAKNESSES
Very high economic benefits. The client is very satisfied.	Might cause very negative social, environmental, or economic impacts.
OPPORTUNITIES	THREATS
Attract a market niche. Improve your services or products.	Chance in customer's preferences.

2.5.4 Points to be Acknowledged from the Scenarios for Granada

Scenario 1: Objectum

This scenario is possible to implement in the province of Granada. There are some local companies that are using a similar model. To introduce this scenario, local companies need money to invest in sustainability, and this money could come from public or private investment. Beneficiaries of this scenario would be local companies and towns of Granada, since the number of visitors would increase.

This could reduce the negative impact of mass tourism since the influx of visitors would be spread throughout the province and improve local economies.

Recommendations for public institutions:

- Public financing.
- Cooperation between local companies.
- Improving sustainability training.

In case of this scenario, the businesses should obtain as much financing as possible or reduce initial sustainable costs as much as possible to offer customers the highest quality in their personalized experience.

Scenario 2: Initium

This scenario is the most usual situation in Granada, and probably, in all countries. This is the traditional scenario in the market, where companies are looking to sell their products or services in regions with high visitor traffic. They are focused on get the maximum profit without keeping in mind sustainability factors. The problem is that this style of tourism depends on the season. In certain seasons, there are towns with little or no visitor arrivals, for example, the coastal area in winter is almost empty, and in the same way, Sierra Nevada area is almost empty in summer. Beneficiaries of this scenario would depend on the season, in winter, it would be businesses and towns near the capital and in Sierra Nevada area, but in summer, it would be businesses and towns in the coastal area.

Recommendations for public institutions:

- To create a public observatory to monitor mass tourism.
- Forums in the sector.
- Agreements for public-private actions.

In case of this scenario, the businesses should try to improve their activities in low demand seasons and to develop areas of sustainability with the purpose of reduce the negative impacts of mass tourism.

Scenario 3: Dystopia

This scenario is not possible in Granada or elsewhere. By combining two very different concepts makes it almost impossible to implement. In the hypothetical case that this scenario would be implemented, the number of visitors would depend on the season, as the previous scenario, companies in the coastal area and Sierra Nevada area would be affected.

Recommendations for public institutions:

- Public financing.
- Improving sustainability training.
- To create a public observatory to monitor mass tourism.

In case of this scenario the businesses should check whether their sustainability measures are successful in reducing the negative effects of mass tourism.

Scenario 4: Present

This scenario is possible to implement in the province of Granada. It is very possible that different companies in the province have implemented a similar model. Opposite to a sustainable model, this concept of model does not require as big an investment. It is important that local companies have information about customer needs to offer a better experience. Beneficiaries would be local companies and towns of Granada in areas where tourist demand is lower all year or in certain seasons.

Recommendations for public institutions:

- To create agreements in the sector to improve the information available on visitor needs.
- Cooperation between local companies in order to improve local economies.

In case of this scenario the businesses should seek to consolidate their market niche and offer the highest possible quality in their customized services.

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3 Conclusion

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A **THREE-YEAR PROJECT** is coming to its end soon, and during the years, the partners experienced the whole pandemic. It has been a difficult journey to develop sustainable tourism and combat the effects of overtourism during the time when travel was non-existent, people were confined to their homes, and SMEs had no business operations because there were no customers. This has led to many consequences, for example, to the dimmed future perspective of prospective, exciting careers in tourism. So many people left the workforce in the field, and now students are not fighting to gain a study place in tourism after the pandemic. Nevertheless, when looking back and ahead of what has been and what might come, the future can be bright again.

Scenario work carried out with businesses in the countries of the partners, in places partners with their students visited and stayed to work with the SMEs, offers hope and sustainable solutions in various scenarios. It is not said that there are no options. There always are. People must make choices and invest in the future. This publication illustrates ways to view the options and the possibilities one can have, but it also requires people to act upon them. It is useful to be aware of what is going on in one's environment, perhaps carry out a PESTE analysis with stakeholders once in a while to see what the future could bring along. Any kinds of useful ideas can lead to sustainable solutions and provide a future that could be desired.

The project MOTION and the partners wish to thank all the SMEs, locations, hotels and hostels we stayed in, restaurants we ate at, airports we traveled through, taxis, bus companies and airlines we used for all the fantastic service and collaboration we have experienced together. We bravely but well-prepared, with high safety measures, organized our first event as a partner meeting in Toruń in October 2021 and the first Intensive Study Program in the same city in December 2021. After that we have toured north and south of Europe together and remain thankful to all the people we have met during our journey through the pandemic to this day. We wish to thank our students who participated in the project in the intensive study programs and online

sprints and the students who worked with us partners on a daily basis for a few months to up to more than a year to be part of our team to fulfil and complete the tasks and carry out development work during the past three years.

Bon voyage to the future!



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GIVEN THAT TOURISM has been fluctuating tremendously during the past four years, the project MOTION has during that time been working on the issues of overtourism and ways on how to solve them, by finding new sustainable solutions for the future. The MOTION Scenario Book illustrates alternative futures through ideas generated in scenarios in five European regions, Rovaniemi in Finland, Fehmarn and Kiel in Germany, the Curonian Spit in Lithuania, Toruń in Poland, and Granada and Monachil in Spain. The book is intended to serve as an inspiration to those who wish to grow sustainable solutions in tourism and combat overtourism. The project was funded by the Finnish National Agency of the EU for the years 2020–2023.



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