

Photo: Hans Ott, Unsplash



# Maritime tourism on the Baltic Sea's terms

*Maritime tourism is the Baltic Sea's most lucrative industry and has the potential to grow even more. However, the poor environmental status risks hindering the development. Investing in well thought-out and well-functioning marine protected areas benefits the environment and is needed for maritime tourism to realise its full potential.*

## Tourism is growing and is expected to keep growing

Maritime tourism in Sweden is growing<sup>[1]</sup> (Fig. 1) and the coastal areas around the Baltic Sea are becoming increasingly popular destinations.<sup>[2][3]</sup> The coolcation trend, with tourists favoring cooler climates over the Mediterranean, indicates continued growth in tourism to Sweden and the Nordic countries.<sup>[4][5]</sup> At the same time, Swedish maritime tourism depends on a healthy sea that provides opportunities for swimming, fishing and other recreational activities.<sup>[6]</sup> Coastal areas with eutrophic bays and turbid waters are not only problematic for the Baltic Sea ecosystem but also mean a loss of opportunities for nature experiences and income from the growing tourism industry.<sup>[7]</sup>

It is important that increasing tourism does not affect the well-being of the coasts and the Baltic Sea. Sweden has committed to protect 30 percent of our marine areas by 2030.<sup>[8]</sup> Hence, protection and increasing use of the marine environment need to go hand in hand - and there is great potential for synergies.

*In this policy document, based on literature and interviews, we have investigated conflict areas and solutions for an increasing tourism on the Baltic Sea's terms.*

## Recommendations

Create conditions for a maritime tourism on the Baltic Sea's terms by:

- 

Providing **sufficient resources** to the authorities in charge of establishing and managing marine protected areas - both in terms of money and human resources.
- 

Involving **local communities** in the planning of coastal and archipelago protection and utilisation.
- 

**Reforming the fisheries policy** and stopping maximising the exploitation of our fish species - this will benefit the health of the coastal zone and maritime tourism.
- 

Using protected areas and maritime tourism to raise **ocean literacy** by providing information about the Baltic Sea ecosystem and what sustainable use means.
- 

Creating targeted initiatives to **distribute visitor pressure** over a longer period to reduce wear on sensitive natural environments, e.g. through harvest festivals, hiking trails, and off-season marketing.
- 

Making sure that money from tourism is **channelled back locally** - this ensures local engagement and increases the development potential of maritime tourism.

## Tourism: the most important maritime industry in the Baltic Sea

Tourism and recreation is the economically largest and most important maritime industry in the Baltic Sea, generating more revenue than both fishing and shipping.<sup>[9]</sup> Maritime tourism generates almost 40 times as much revenue as commercial fishing.<sup>[10]</sup> Tourism is an important source of income in Sweden and the Baltic Sea region, unlike large-scale fishing, which costs taxpayers more than it generates.<sup>[11]</sup>

The most popular activities at sea and along the coasts include fishing, sailing, swimming, hiking and dining out.<sup>[12]</sup> Accommodation revenue constitutes a significant share of the maritime tourism turnover and has, except for the pandemic years, increased in Baltic Sea municipalities. Over 13 years, revenue from accommodation has more than doubled, from around 3 billion to over 6.5 billion SEK (Fig. 2).<sup>[13]</sup>

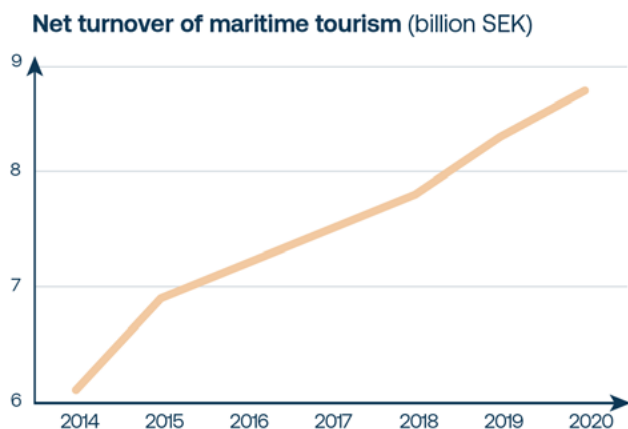


Figure 1. Net turnover of maritime tourism. Applies to the Gulf of Bothnia, the Baltic Proper, and other coastal municipalities with more than 10,000 inhabitants within 5 km of the coast. Source: SLU.

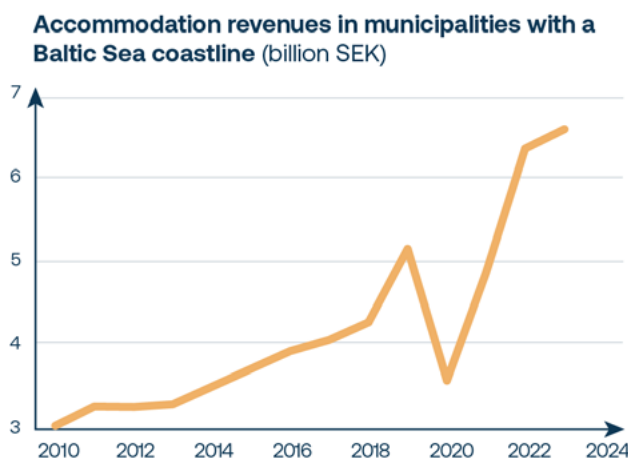


Figure 2. Accommodation revenues in the municipalities with a Baltic Sea coastline.

## Maritime tourism is not living up to its full potential

Nature is one of the tourism industry's most important resources.<sup>[14]</sup> Marie Östblom, who coordinates nature experiences in the Stockholm archipelago, says that 'without the raw material [nature] we don't have a tourism industry.'<sup>[15]</sup> When the environmental status of the Baltic Sea is poor, maritime tourism suffers, thereby reducing the value and development potential of the tourism industry.<sup>[16]</sup>

The environmental status of the Baltic Sea is strongly affected by eutrophication, which leads to increased algal blooms, affecting both the water quality and beaches.<sup>[17]</sup> It has a negative impact on maritime tourism – after all, who would want to travel along coastal areas with murky water, where algal blooms can even be toxic at times?<sup>[18]</sup>



Photo: Folke Rycén

Heavy algal blooms prevent swimming.

Recreational fishing, which is a major part of maritime tourism, is also negatively affected by the Baltic Sea's poor environmental status and unsustainable fisheries management.<sup>[19][20][21]</sup> As a result, tourism revenues are lower than they could be if the Baltic Sea were in better health and had thriving coastal communities.<sup>[22]</sup> Research shows that a deterioration of marine ecosystems can lead to a multi-billion loss for the Swedish tourism industry.<sup>[23]</sup> For maritime tourism to reach its full potential and remain profitable, the sea must be managed in a way that considers the importance of the tourism industry while also protecting and restoring the marine environment.

## Increasing tourism can strain the Baltic Sea – therefore, seasonal extension is needed

Planning and management are required for the increasing tourism around the Baltic Sea to develop in a sustainable way.<sup>[24][25][26]</sup> The tourism industry is resource-intensive and can have a negative impact on the environmental status of the Baltic Sea,<sup>[27]</sup> especially if the number of tourists exceeds a destination's capacity to accommodate them. Some of the main problems associated with increasing tourism are the degradation of terrestrial environments and sensitive coastal zones, as well as problems with fresh water supply.<sup>[28]</sup>

To reduce negative impacts, the tourism season needs to be extended.<sup>[29][30]</sup> Many destinations in Sweden experience high visitor pressure during the summer<sup>[31][32]</sup>. Strategies are needed to distribute the number of visitors over a longer period. Destinations that offer different types of activities are generally more successful in extending their season.<sup>[33]</sup> Öland is one destination that has worked on seasonal extension by prolonging its tourist season into September with an annual harvest festival.<sup>[34]</sup> Another example is Stockholm Archipelago Trail - a newly opened hiking trail, which National Geographic has highlighted as one of the world's best destinations in 2025.<sup>[35]</sup> The trail is intended to make the archipelago accessible to more people, create opportunities for local tourism and extend the visitor season.<sup>[36]</sup> Seasonal extension also increases opportunities for local people to earn a steady income

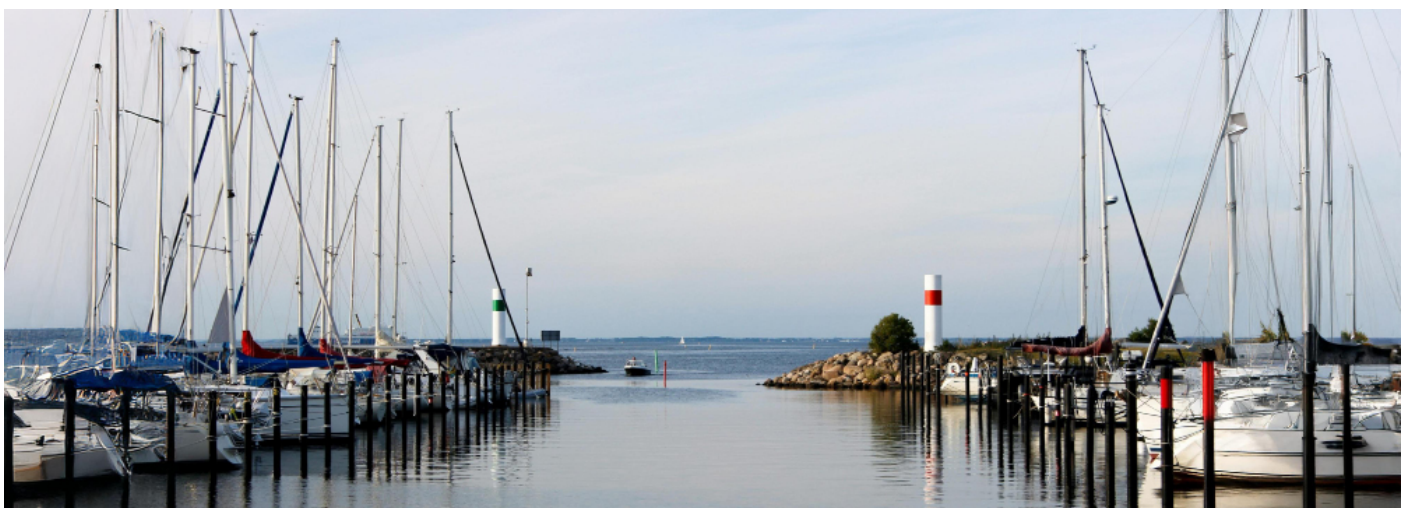
from tourism, as tourism businesses can stay open and retain their employees for longer periods.<sup>[37]</sup>

## 30 percent to be protected

Protected areas can play an important role in strengthening the biodiversity and environmental status of an area.<sup>[38][39]</sup> Sweden will contribute<sup>[40]</sup> to the international target of protecting at least 30 percent of the sea, of which at least 10 percent will be strictly protected, by 2030.<sup>[41][42]</sup> Today, a total of 11 percent of the Baltic Sea is protected, of which only 0.8 percent is strictly protected.<sup>[43]</sup> In five years, we have to more than double the existing marine area protection and more than tenfold the strict protection.

Different types of protection, such as national parks or nature reserves, can be established for various purposes. The outcome depends entirely on how it is designed and where it is implemented.<sup>[44][45]</sup> Consideration needs to be given to the specific needs of the site and its contribution to a network of marine protected areas.<sup>[46][47][48]</sup> The Swedish Agency for Marine and Water Management (SwAM) has developed a framework to facilitate the development of a more coherent and ecologically functional network of effectively managed marine protected areas.<sup>[49]</sup> There is no legal requirement for the protection of areas to contribute to such a coherent network.<sup>[50]</sup> Moreover, the established protected areas are often too small to effectively contribute to meeting the objectives.<sup>[51][52]</sup>

Photo: Jesper Ericsson, Unsplash



Dredging and shading from piers affect the seabed and coastal ecosystems.

## Fact box

### Protection of marine areas

There are various types of marine protected areas, each with different purposes, functions, and scopes. Some of the most common protections regulated by the Swedish Environmental Code include:

- **Marine national parks:** This is the strongest form of protection. The aim is to protect marine environments and species that are unique to the country. Sweden will have its first marine national park in the Baltic Sea in 2025, the Nämndö Archipelago National Park.
- **Marine nature reserves:** The aim of nature reserves is to protect valuable marine environments. They are established and managed by county administrative boards and municipalities. Measures can include prohibiting boat traffic, anchoring and dredging.
- **Natura 2000:** Natura 2000 sites aim to protect and conserve valuable nature for future generations by establishing a network of the EU's most valuable nature sites.

There are several types of protected areas without support by the Swedish Environmental Code. One example is **biosphere reserves**, which are established by UNESCO. These areas are based on local commitment to preserve/achieve a balance between both cultural and natural landscapes.

Sources: SwAM, SEPA, UNESCO.

## Management from a holistic perspective

The well-being of the Baltic Sea requires a holistic approach where the whole sea is managed sustainably, not just the 30 percent to be protected. Shore protection is an important complement to marine protected areas, both to ensure sustainable management of the remaining 70 percent and to safeguard the interests of maritime tourism.<sup>[53]</sup> Coastal areas, such as shallow bays, are particularly worthy of protection for both climate mitigation and biodiversity.<sup>[54][55]</sup> Dispensation to the shore protection, for example to build housing facilities, can lead to habitat loss<sup>[56]</sup> and impact seabed environments.<sup>[57]</sup> Problems can also arise in the long term when dispensation are granted too widely. Many small dredging operations can, for example, cause cumulative effects on coastal environments.<sup>[58][59]</sup>

Managing marine protected areas requires both resources and specialized expertise. County Administrative Boards responsible for managing marine environments have called for additional expertise and operational guidance throughout all stages of the management process: planning, implementation, and monitoring.<sup>[60]</sup> One thing that is lacking is clarity on who

should coordinate marine spatial planning and collaboration between authorities.<sup>[61][62][63][64]</sup>

### Include local stakeholders

When establishing marine protected areas, it is important to include the local community in the process for the protection to be realised and sustainable in the long term. Different interests and engagement become stronger the closer they are to a potentially protected area, and it is at the local level that the understanding of an area's ecological value and specific conditions is greatest.<sup>[65]</sup>

Experience shows that disagreements among stakeholders are common when an area is to be protected.<sup>[66][67]</sup> In the case of Kosterhavet National Park, the dialogue was marked by shared learning and compromise. However, in the St Anna archipelago, the main areas of conflict could not be resolved, resulting in the cancellation of plans for a marine national park. The St Anna archipelago later received a different type of protection.<sup>[68][69]</sup> Strong engagement with local communities and business representatives is also crucial for responsible and long-term governance of natural and cultural landscapes outside protected areas.<sup>[70]</sup>

### Protection: an investment that pays off

Protecting areas comes at a cost. Between 2024 and 2027, SwAM will allocate SEK 267 million to projects that protect marine and aquatic environments. For the Baltic Sea counties, the money will mainly be used to establish new marine protected areas with high nature values. This is much needed as the current number of protected coastal environments in and along the Baltic Sea is small.<sup>[71]</sup> However, additional resources are needed not only to establish but also to manage an increased number of protected areas. Moreover, protecting nature is always cheaper than restoring it.<sup>[72]</sup> Sweden has an obligation under EU law to restore marine environments. Protecting more areas therefore means reducing future costs by preventing further deterioration of the marine environment.<sup>[73][74][75]</sup>

Access to natural environments is also good for public health, as spending time in nature supports both mental and physical well-being.<sup>[76][77]</sup>

One result of protecting an area is an increase in the number of visitors, as it signals that the location is worth visiting. One example is national parks, which are both strictly protected areas and popular destinations.<sup>[78]</sup> National parks are important for Sweden's attractiveness and tourism offerings,<sup>[79]</sup> but studies on their socio-economic contribution are lacking. In Finland, it has been estimated that every euro invested in national parks returns ten euros to the local economy.<sup>[80]</sup> A similar comprehensive study is needed for Sweden's national parks to better highlight the value of investing in protected areas.

### Conclusions

Tourism is the largest maritime industry in the Baltic Sea in economic terms – it contributes to the national treasury and is important for thriving coastal communities. A healthy Baltic Sea is a prerequisite for maritime tourism and its potential for future growth. If we fail to protect our sea and coastal areas, we risk the deterioration of habitats, which will negatively affect plant and animal life, and risk losing tourists to our Nordic neighbours.

There are synergies between tourism and protected marine areas: investments in protection benefit both the environment and maritime tourism, which relies on the Baltic Sea having a healthy environmental status. The design of the protection is more important than the type of protection – connectivity is crucial, meaning that areas must be established with the aim of enabling the spread of plants and animals. Resources are required to fulfil existing regulations and strategies for protecting the Baltic Sea and its coastline. Without designated responsibility, it will be difficult to effectively implement these protective measures.

Investments in marine protected areas are needed now – for the environment, climate and economy.

---

This policy document was produced by Jonathan Pluntke, Klara Livsey Berg and Tove Brynteson with support from Helene Limén within the framework of BalticWaters trainee programme autumn 2024.

## References

- 1 The Swedish Agency for Economic and Regional Growth, [Kunskapsbank för turism och besöksnäring \[in Swedish\]](#) (Retrieved 2024-12-02)
- 2 Government Bill 2023/24:156 [Ett levande hav – ökat skydd, minskad övergödning och ett hållbart fiske \[in Swedish\]](#).
- 3 The Swedish Agency for Marine and Water Management (2024). [Marin strategi för Nordsjön och Östersjön 2024-2029 \[in Swedish\]](#).
- 4 Condé Nast Traveler, [The Biggest Travel Trends to Expect in 2024](#) (Retrieved 2024-12-02)
- 5 Matei, N.A. et al. (2023). [Regional impact of climate change on European tourism demand](#). JRC Technical Report JRC131508.
- 6 Krafvelin et al. (2018) [Relationships between human activities and marine ecosystem services](#), SLU ID: SLU.aqua.2017.4.2-207.
- 7 The Swedish Agency for Marine and Water Management (2024). [Marin strategi för Nordsjön och Östersjön 2024-2029 \[in Swedish\]](#).
- 8 Government Bill 2023/24:156 [Ett levande hav – ökat skydd, minskad övergödning och ett hållbart fiske \[in Swedish\]](#).
- 9 The Swedish Agency for Marine and Water Management (2017). [Ekonomisk statistik om sektorer som är beroende av havet \[in Swedish\]](#).
- 10 The Swedish Agency for Marine and Water Management (2017). [Ekonomisk statistik om sektorer som är beroende av havet \[in Swedish\]](#).
- 11 BalticWaters (2023) [Så mycket kostar Östersjöfisket \[in Swedish\]](#). (Retrieved 2024-12-02)
- 12 The Swedish Agency for Marine and Water Management (2012). [Marine tourism and recreation in Sweden](#).
- 13 The Swedish Agency for Economic and Regional Growth (2024). [Turismstatistik \[in Swedish\]](#).
- 14 Wall Reinius, S., et al. (2011). [Naturen viktig för turismen – men kunskapen är otillräcklig \[in Swedish\]](#), ETOUR, Fakta turism 1.
- 15 Interview with Marie Östblom, Stockholm Archipelago/Stockholm Business Region, 2024-11-12.
- 16 Government Bill 2023/24:156 [Ett levande hav – ökat skydd, minskad övergödning och ett hållbart fiske \[in Swedish\]](#).
- 17 The Swedish Agency for Marine and Water Management (2024). [Marin strategi för Nordsjön och Östersjön 2024-2029 \[in Swedish\]](#).
- 18 Karlson, B. et al. (2021). [Harmful algal blooms and their effect in coastal seas of Northern Europe](#). Harmful Algae, Vol. 102.
- 19 The Swedish Agency for Marine and Water Management (2024). [Värdet av svenskt fritidsfiske i Sverige \[in Swedish\]](#).
- 20 Havet.nu (2024). [Överfiske \[in Swedish\]](#). (Retrieved 2024-12-02)
- 21 The Marine Environment Institute (2024). [Fakta och tankar om nationell havsförvaltning \[in Swedish\]](#).
- 22 The Swedish Agency for Marine and Water Management (2024). [Marin strategi för Nordsjön och Östersjön 2024-2029](#).
- 23 Otrachshenko, V. et al. (2016). [Fishing for answers? Impacts of marine ecosystem quality on coastal tourism demand](#). Tourism Economics, Vol. 23.
- 24 Matei, N.A. et al. (2023). [Regional impact of climate change on European tourism demand](#). JRC Technical Report JRC131508.
- 25 The Swedish Agency for Economic and Regional Growth (2020). [Att arbeta för hållbar turism \[in Swedish\]](#).
- 26 Interview with Cecilia Wibjörn, Skärgårdsstiftelsen, 2024-10-23.
- 27 The Swedish Agency for Marine and Water Management (2024). [Marin strategi för Nordsjön och Östersjön 2024-2029 \[in Swedish\]](#).
- 28 Interview with Sofia Wikström, Stockholm University Baltic Sea Centre, 2024-10-18.
- 29 Grossi, L. and Mussini, M. (2021). [Seasonality in tourist flows: Decomposing and testing changes in seasonal concentration](#). Tourism Management, Vol. 84.
- 30 The Swedish Agency for Economic and Regional Growth (2023). [Mot en hållbar utveckling \[in Swedish\]](#). (Retrieved 2024-12-02)
- 31 Skärgårdsstiftelsen (2023). [Besökare i Skärgårdsstiftelsens områden 2022 \[in Swedish\]](#).
- 32 SVT Nyheter (2024). [Gotlänningar inför turistsommaren: "Vi vill inte ha hit fler turister" \[in Swedish\]](#). (Retrieved 2024-12-02)
- 33 Grossi, L. and Mussini, M. (2021). [Seasonality in tourist flows: Decomposing and testing changes in seasonal concentration](#). Tourism Management, Vol. 84.
- 34 Ölandsbladet (2024). ["Tack vare skördefesten blir högsäsongen betydligt längre" \[in Swedish\]](#). (Retrieved 2024-12-02)
- 35 National Geographic (2024). [The 25 best places in the world to travel to in 2025](#). (Retrieved 2024-12-02)
- 36 Vagabond (2024). [National Geographic hyllar Stockholms skärgård \[in Swedish\]](#). (Retrieved 2024-12-02)
- 37 Region Stockholm (2024). [Handlingsplan. Förlängd säsong i Stockholms skärgård 2030 \[in Swedish\]](#).
- 38 Stockholm University Baltic Sea Centre (2016). [Förbättrad kvalitet på marint områdesskydd \[in Swedish\]](#).
- 39 The Swedish Environmental Protection Agency (2020). [Grön infrastruktur i havet \[in Swedish\]](#).
- 40 Government Bill 2023/24:156, Bet. 2024/25:MUJ5 [Ett levande hav – ökat skydd, minskad övergödning och ett hållbart fiske \[in Swedish\]](#), Official Report 2024/25:32.
- 41 The European Commission (2020). [EU Biodiversity Strategy for 2030](#).
- 42 Kunming-Montreal Global biodiversity framework (2022).
- 43 Government Bill 2023/24:156 [Ett levande hav – ökat skydd, minskad övergödning och ett hållbart fiske \[in Swedish\]](#).
- 44 Stockholm University Baltic Sea Centre (2016). [Förbättrad kvalitet på marint områdesskydd \[in Swedish\]](#).
- 45 Interview with Lena Gipperth, Gotheburg University, 2024-11-01.
- 46 Article 3, [Habitats and Species Directive \[in Swedish\]](#).
- 47 Article 13.4, [Marine Strategy Framework Directive](#).
- 48 Government Bill 2023/24:156, Bet. 2024/25:MUJ5 [Ett levande hav – ökat skydd, minskad övergödning och ett hållbart fiske \[in Swedish\]](#), Official Report 2024/25:32.
- 49 The Swedish Agency for Marine and Water Management (2021). [Nätverk av marina skyddade områden i Sverige \[in Swedish\]](#).
- 50 Swedish government official reports 2020:83 [Havet och människan \[in Swedish\]](#).
- 51 Swedish government official reports 2020:83 [Havet och människan \[in Swedish\]](#).
- 52 Berkström, C. et al. (2019) [Ekologisk konnektivitet i svenska kust- och havsområden – en kunskapssammanställning \[in Swedish\]](#). SLU Aqua Reports 2019:15.
- 53 Chapter 7, Section 13 of the Environmental Code.
- 54 BalticWaters (2024). [Help the Baltic Sea to mitigate climate change](#).
- 55 BalticWaters (2023). [Dredging with unforeseen consequences](#).
- 56 The city of Stockholm. [Olika skydd av natur \[in Swedish\]](#). (Retrieved 2024-12-02)
- 57 The Swedish Agency for Marine and Water Management (2022). [Hav i balans samt levande kust och skärgård \[in Swedish\]](#).
- 58 Government Bill 2008/09:119 [Strandskyddet och utvecklingen av landsbygden \[in Swedish\]](#).
- 59 The Swedish Environmental Protection Agency (2020). [Grön infrastruktur i havet – Landskapsperspektiv i förvaltningen av Sveriges marina områden](#).
- 60 The Swedish National Audit Office (2024). [Förvaltningen av skyddad natur \[in Swedish\]](#).
- 61 Interview with Lena Gipperth, University of Gothenburg, 2024-11-01.
- 62 The Swedish Agency for Marine and Water Management (2022). [Hav i balans samt levande kust och skärgård \[in Swedish\]](#).
- 63 The Marine Environment Institute (2024). [Fakta och tankar om nationell havsförvaltning \[in Swedish\]](#).
- 64 Interview with The Swedish Environmental Protection Agency and the Stockholm County Administrative Board, 2024-11-05.
- 65 Interview with Lena Gipperth, University of Gothenburg, 2024-11-01.
- 66 Stockholm University Baltic Sea Centre (2024). [Inför fler fiskefria områden för att skydda bestånd och ekosystem \[in Swedish\]](#).
- 67 Interview with Klas Sandell, Professor Emeritus of Cultural Geography, 2024-10-31.
- 68 The County Administrative Board of Östergötland. [Sankt Anna naturreservat \[in Swedish\]](#). (Retrieved 2024-12-02)
- 69 Interview with The Swedish Environmental Protection Agency and the Stockholm County Administrative Board, 2024-11-05.
- 70 Interview with Klas Sandell, Professor Emeritus of Cultural Geography, 2024-10-31.
- 71 Natursidan (2024). [Ny satsning på att skydda havsmiljöer \[in Swedish\]](#). (Retrieved 2024-12-02)
- 72 University of Gothenburg (2020) [Viktigt ålgräs skyddas i Göteborg \[in Swedish\]](#). (Retrieved 2024-12-04)
- 73 The County Administrative Board (2015). [Skydda och vårda våra viktiga vikar \[in Swedish\]](#).
- 74 Recitals (9) and (10) of the [Nature Restoration Regulation \[in Swedish\]](#).
- 75 The Swedish Agency for Marine and Water Management (2022). [Hav i balans samt levande kust och skärgård \[in Swedish\]](#).
- 76 The Public Health Agency of Sweden (2024). [Friluftsliv för bättre folkhälsa \[in Swedish\]](#).
- 77 KC, B. et al. (2024). [Tourism and national collaboration in protected areas](#). Annals of Tourism Research Empirical Insights, Vol. 5.
- 78 Naturturismföretagen (2023). [Forumdiskussion: Möjligheter och erfarenheter kring naturturism i skyddad natur \[in Swedish\]](#). (Retrieved 2024-12-02)
- 79 Naturturismföretagen (2018). [Nationalparker viktiga för Sveriges attraktionskraft, naturturismföretagare och samhälle \[in Swedish\]](#). (Retrieved 2024-12-02)
- 80 Metsähallitus (2023). [Nationalparker och strövområden ger nytta för lokalekonomin \[in Swedish\]](#). (Retrieved 2024-12-02)