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A Comparative Analysis of Seaports in Terms of the Development of Maritime Tourism in the Area of the Baltic Sea

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Abstract: This study examines maritime tourism in the Baltic Sea region. The first part presents basic information related to the maritime tourism market, along with the key aspects and effects that the maritime tourism market has on the regions where it takes place. The next part concerns the Baltic Sea. The location and characteristics of the Baltic Sea are briefly presented. Passenger shipping connections between Baltic ports are described. The last part is devoted to the analysis of statistical data in the Baltic Sea region, focusing on passenger exchange in selected ports and in the entire Baltic Sea over the years. Finally, the potential directions of the development of maritime tourism in the Baltic Sea are characterized.

Keywords: Baltic Sea; comparative analysis; maritime tourism; seaports; transportation

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1. Introduction

The work includes an analysis of the Baltic Sea region in terms of maritime tourism and its development prospects. The characteristics of the tourist market in the Baltic Sea at present, together with a comparison of the results achieved by seaports in terms of sea passenger traffic over the years and the actions taken towards the development of these ports, are the main components of the analysis.

Currently, maritime tourism is a popular way by society of spending free time, thanks to which, over the last three decades, it has become one of the fastest-growing sectors of the world economy, thus generating huge development opportunities for port regions. An increased standard of living, better income, and global development create demand for both ferry and cruise shipping, which generates the expansion of the offer and a route network of passenger shipping operators. Cruises used to be perceived as a luxurious way to spend time; today, this offer and its various variants are so adapted that they will meet the expectations of a very demanding clientele with a high standard, travelers with a smaller budget, and people of all ages, as well as families with children. The Baltic Sea is an area in northern Europe where maritime tourism is developing most dynamically, and all countries around the Baltic Sea and their ports participate in passenger exchange [1]. Both regions and port institutions must face the ongoing changes, adapt the offer in accordance with demand, and improve its attractiveness, as well as monitor the current tourism market and potential demand in the coming years in order to implement innovative and ecological solutions that will ensure the long-term efficiency of passenger seaports. The sources used to write the work are mainly based on data and information provided by the official websites of the Ports of Stockholm, Helsinki, Copenhagen, Rostock, and Gdynia, as well as passenger shipping carriers, the European Statistical Office, and Cruise Baltic. The literature used in the work are books and articles on maritime tourism, in which its organization and aspects of functioning are described, as well as articles aimed at determining the demand for maritime tourism in the Baltic Sea region in the direction of ferry or cruise shipping. The motive for writing the paper is the desire to explore knowledge in the field of maritime tourism and analyze the development opportunities of Baltic ports and potential changes that may have a positive impact on the development of the economy in the regions where passenger seaports are located. This interest is related to the dynamic development of tourism over the last twenty years.

The research problem related to the following work is whether seaports and regions in the area of the Baltic Sea will be able to meet the requirements of the global tourism market and the expectations of potential customers. The work aims to analyze the current maritime tourism market in the Baltic Sea and the changes taking place over the years, as well as the actions taken for its development, which will allow us to answer the question of whether the Baltic port cities are and will be able to attract more and more tourists with their offer. The hypothesis is as follows: if the seaports in the Baltic area do not meet the market requirements and do not take action towards the sustainable development of ports, the Baltic tourist market will experience significant declines in the coming years. The work uses analytical methods, cause and effect, mutual correlations, and comparisons of the activities of various ports and regions, which are carried out based on the collected data and information.

The first section introduces the subject of the functioning of maritime tourism in the global economy. It describes definitions, key aspects, and effects, as well as the factors determining the attractiveness of ports and port cities in terms of maritime tourism. The second section is entirely devoted to the subject of the Baltic Sea region and the selected ports and towns located in them. First, the location and a brief description of the Baltic Sea are determined. In the next stage, passenger shipping connections between Baltic ports are defined. The last section is devoted to the analysis of the prospects for the development of maritime tourism in the Baltic Sea region. It starts with an analysis of the statistical data. Finally, the potential directions of the development of maritime tourism in the Baltic Sea and the role and organization of seaports and port services are characterized.

2. Maritime Tourism

The World Tourism Organization defines tourism as the activity of people traveling to places outside their everyday environment and staying there for no more than a year for recreation, business, or any other purpose not related to the performance of an activity for which remuneration is received in the visited place [2]. With regard to the general definition of tourism used by the World Tourism Organization, maritime tourism can be defined as staying in the area of the sea or ocean for recreational or business purposes using sea or water transport for a period not longer than one year [3].

Maritime tourism is present in the world literature in many aspects. You can find many popular and scientific publications in many magazines around the world. The regional aspects of maritime tourism and their impact on the Greek economy can be found in the article [4]. An interesting analysis of the Pakistani government's activities with regard to the development of maritime tourism is described in the paper [5]. The development of the marine tourism market in Indonesia can be found by analyzing the publication [6]. From the summary article, you can learn that cruise ship tourism is an important segment of the maritime tourism market [7].

2.1. Maritime Tourist Market

Since the early 1970s, when specialized, fast, and comfortable ships replaced the last liners, cruise shipping has experienced uninterrupted growth and unstoppable globalization trends. This growth is due to its extraordinary resilience to the economic, social, political, and other crises that regularly challenge both the shipping and tourism sectors [8].

The globalization of cruises is greatly aided by profitable cruise lines that leverage economies of scale and advanced segmentation to offer innovation and new route types, and by the growth and strategies of cruise ports looking to host more cruises. Renewing and increasing the capacity of cruise ships, improving the condition of the shipbuilding industry and ports, and the growing interest in travel destinations allow for planning more complex routes and the sophistication and specialization of the products offered, which translates into an increase in the number of passengers using cruises [9].

The Cruise Lines International Association [10] forecast for the cruise industry for 2019 predicted that, in 2019, over 30 million people would take cruises around the world. Five years earlier, forecasts predicted that this milestone would not be reached until 2024. Finally, according to the latest pre-pandemic data of the Cruise Lines International Association [11], 29.7 million passengers cruised in 2019.

A cruise is a combination of sea transport and travel services, facilitating the leisure of passengers paying for an itinerary and possibly other services on board, including at least one night on a seagoing vessel with a capacity of at least 100 passengers. The cruise ship is the centerpiece of the experience, which is not your standard mode of transportation. A significant part of the experience that a passenger receives during a cruise takes place within the ship.

The growth of cruises has led to market segmentation. The different types of ships, combined with the different facilities offered onboard and offshore, define the types of cruises offered, and this, in turn, is the target for different groups of potential cruisers. Cruise lines or certain brands of larger corporations, trying to penetrate the market further, are present in one or more main segments, aiming at expanding the social and age groups to which they target their cruises, as well as gaining regular customers. Mainstream cruises rival land cruises by offering a versatile and feature-packed holiday with accommodation, dining, and entertainment in a laid-back atmosphere, with newer ships offering modern design and comfort, and much more. Premium flights are more exclusive cruises, also offering many amenities, with more emphasis on refined service and more space. With a price that includes accommodation, meals, and entertainment, the value of premium cruises exceeds or rivals the best packages offered by upscale hotels and resorts. Luxury cruises are characterized by the highest level of quality and personalized service offered on luxury cruise ships and on land in exotic ports. Luxury lines, which are more expensive than others, offer more comprehensive prices than other cruise lines and the opportunity to travel to exotic destinations. The fourth segment of the market is specialized cruises. They focus on niche destinations or special voyage styles, such as expedition cruises, sailing ships, and an increasing number of river cruises. They visit some of the world's most remote and pristine destinations, offering unique experiences that visitors will find educational and adventurous [9].

Seemingly unstoppable globalization is greatly supported by the profitability of cruise lines, economies of scale, the increasing segmentation of cruise shipping, and the desires for and strategies of cruise ports and destinations to host more cruises [9].

The globalization of cruise shipping is based on three types of routes organized by cruise lines [12]:

- Permanent, located in a region that is served all year round due to resilient demand (with high/low periods) and stable weather conditions,
- Seasonal, serving the periodic market potential in periods with good weather conditions, in the so-called peak seasons,
- Routes with a change of location, between permanent or seasonal markets, where very often the voyage is in one direction only, or with a change of next port destinations.

According to many sources, the Caribbean has been the dominant market for cruises since its inception. The Caribbean and the Mediterranean are regional and complementary markets, accounting for more than 70% of the world's cruise industry capacity, offering a variety of cultures in close proximity and therefore a perfect match [13]. These markets are complementary in the sense that the Caribbean is mainly served in the winter, while the Mediterranean peaks in the summer. Seasonality therefore plays a key role in the cruise industry and is observed both in relation to the regions where the cruise departs and the destination [14]. North America remains the dominant boarding region year-round, with Europe accounting for 40–50% of the summer season. Both of these markets are constant, as they are served all year round [15]. Alaska, the northeast Atlantic, and

Australia/New Zealand are examples of strictly seasonal markets that are only served during the summer months [16].

Ships are used to operate these different types of routes to allow the maximum use of capacity combined with maximizing profit per passenger and reducing costs (mainly through lower fuel consumption). In addition to the geographic distribution of source markets for passengers, the factors influencing distribution patterns include: the need to match brands and vessels to the demographics of source markets; links with air and land transport; the ability to balance the best-known destinations with lesser-known destinations, or developing new routes and creating routes for new markets; potential revenues from services on land compared to expenses on board; and fuel sourcing, availability, and costs. All of these factors are analyzed in parallel with the time, speed, and distance formula to decide where and how to deploy cruise ships.

The cruise industry sells cruise routes, not destinations, where the choice of port of call order plays a key role. Cruise operators face the challenge of developing competitive routes while optimizing the deployment of their cruise ship fleet to minimize operating costs and/or maximize revenue. The main factors that influence strategy planning are [17]:

- Market circumstances and requirements, such as seasonality of demand, the optimal duration of the voyage, a balance between sailing time and time spent on land, the existence of sights, and overall guest satisfaction,
- Purely operational considerations such as mooring capacity and navigability in ports, distance between ports, and synchronization with air transfers,
- Competitiveness of the market, i.e., the location and capacity of competing vessels, the configuration of existing cruise services and routes, and the existing structure of the market.

Analyzing the relationship between supply and demand in a given region is a key aspect of strategy planning for cruise operators, as the cruise industry is clearly a customer-centric industry. The ultimate goal of a market analysis is not only to check whether the operator is able to generate demand for a new cruise service, but also to assess its volatility and seasonality. These factors will affect the earning potential of the new service.

2.2. Key Aspects and Effects of Sea Tourism

Ports and tourist destinations are interested in developing cruise activities in all regions. This is not least because cruises involve significant financial impacts on port cities or nearby tourist destinations. With the increasing importance of the social integration of ports with port cities, cruises have become part of the programs of port authorities and other port management organizations. In many parts of the world, ports have been shifted from multi-purpose terminals or temporary transhipment facilities to specialized terminals to act as destination ports and, if possible, home ports for financially viable cruises [18].

Among the most critical issues that cruise ports have to deal with are the availability of appropriate infrastructure and the practical organization of the cruise terminal. Cruise ports need deeper and longer docks to efficiently handle the next generation of cruise ships [19]. Creating new infrastructure is a serious challenge, especially for those ports that face a shortage of land or the need for regular dredging. In the latter case, this means minimizing the potential impact on marine biota (through land reclamation) and finding the best way to process and use dredging products [20].

In addition to the issues worth considering in all ports, such as the number of berths, water and sewage infrastructure, customs, agents, pilots, security and immigration processes, and use of gangways, etc., the development of transport and tourism potential is also crucial. These issues need to be addressed after developing a better understanding of the exact implications of the continued increase in the size and capacity of cruise ships and the resulting scale of operations.

The optimal planning of cruise ports and their terminals enables the most sustainable operation possible. This has inevitably caused cruise lines and port managers to address the issue of long-term contracts. Parameters should be defined that would allow for a given location or port to gain long-term commitment from cruise lines, which would motivate changes in products and processes. Destinations and ports are looking for ways to partner with cruise lines in this regard, and a broader understanding of what needs to be enacted to achieve this goal is essential.

The allocation of berths is a long-term planning issue for ports, with key social implications. This practice refers to planning in advance which cruise ships will visit a given port on a given day within a certain time period. Taking into account the limitations resulting from the geographical distances between the ports covered by the cruise route and the length of the cruises, the phenomenon of mooring many operators at the same time is not uncommon. The problem of berth allocation is even more important for smaller, secondary cruise ports. In small, picturesque towns, cruise port calls can mean relatively unpleasant situations related to a crowded place on certain days or times, or even a disruption to other tourist activities. In larger ports, this can take the form of congestion when large ships carrying thousands of people arrive. The arrival of two medium-sized cruise ships at a given port means that more than 6000 passengers disembark at the same time. The number of passengers handled can increase without increasing the number of cruise ship calls. However, in some cases, congestion in small- and medium-sized towns arises simply from a small number of additional calls. Without effective planning, on certain days, these towns are exposed to the pressure and negative effects of too many passengers that cannot be accommodated in a positive way. The fact that, in many cases, the presence of cruises is conditioned by seasonality further exacerbates the problem faced by smaller, tourist-attractive towns [21].

Local communities have also widely, though not universally, supported the idea of organizing more cruises. Admittedly, passenger and crew spending contributes significantly to the economies of cruise host countries. Expenditure on cruise tourism has a direct, indirect, and induced impact on the economy of the destination. The direct effect concerns a supplier that sells goods and services directly to cruise ships, cruise passengers, and crew. Cruise ship expenses include port costs, maritime expenses, food and beverages, fuel, water, and maintenance. Cruise passenger spending includes expenses that are not part of the cruise itself, such as taxis, souvenirs, land trips, food, and beverages, etc. Crew expenses include restaurants, retail goods, leisure activities, and transportation, etc. Indirect effects arise from purchases made by direct suppliers, such as goods from other companies. Induced effects arise as a result of the direct and indirect expenditures of recipients, which result from their increased income [22].

Cruise lines' spending on goods and services to support their business, along with a range of other indirect and/or induced positive effects, provide additional incentives to organize more cruises. According to the International Cruise Lines Association (CLIA), in 2019, a total of 148.4 million passenger and crew shore visits generated USD 72.0 billion in direct spending at destinations and source markets around the world. These expenditures generated a total (direct, indirect, and induced) global output of USD 154.46 billion. This production required 1.2 million full-time workers with an income of USD 50.5 billion (Table 1).

Table 1. Total global economic contribution of the cruise industry.

Category	Value
Shore visits by passengers and crew (USD million)	148.41
Total direct expenditures (USD billion)	72.02
Total product input (USD billion)	154.46
Total contribution to income (USD billion)	50.53
Total employment contribution	1,166,213

Note: Source: CLIA 2019, https://cruising.org/ (accessed on 10 July 2023).

The cruise industry continues to grow dynamically. North America recorded another year of passenger growth of 8.2%, while Europe achieved a slightly lower, but still quite competitive result of 7.5%. The rest of the world experienced a decline in passenger numbers from regions that make up 7.9% of the CLIA database. Table 1 shows the development of the international cruise industry between 2009 and 2019, and during this ten-year period, the demand for cruises worldwide increased from 17.6 million passengers (2009) to 29.7 million (2019). This represents an overall increase of 69% and 5.4% annually.

Since 2009, the number of passengers from North America has increased by 49%. North America remains the largest source market, accounting for about half of all cruise passengers.

Europe has also seen strong growth over the past decade, with the number of passengers traveling from Europe increasing by 53% during this time. In 2009, Europe accounted for 29% of the global cruise market, serving five million passengers. In 2019, this share increased to 7.7 million passengers. Despite this growth, Europe's total market share fell slightly from 29% in 2009 to 26% in 2019 [23].

Over the past 10 years, the rest of the world has seen the greatest growth in terms of both passenger volumes and market share. In 2009, it accounted for 12% of the world cruise market, with 2.2 million passengers. In 2019, this number of passengers increased to 22% of the entire global market (6.5 million passengers). This ten-year passenger growth represents an increase of 200 percent. However, it should be noted that the number of passengers outside Europe and North America decreased by 7.9% in 2019. This is the first time since 2015 that the number of passengers from any region has decreased compared to the previous year.

By transporting people to different destinations, cruise ships replace air travel. As floating hotels, they offer accommodation services. Cruise ships are increasingly being used as holiday resorts and it is well known that the vast majority of cruise passengers do not even disembark at the ports they visit. Given the recent boom in the cruise industry, it is difficult to find data to analyze the economics of cruise tourism. Most contemporary work is based on observational data, as it is difficult to accurately quantify the number of cruise travelers who disembark and spend time at a berth, spending cash and using the city's infrastructure. At the moment of disembarking, they blend in with the group of tourists, which makes it impossible to accurately calculate the profits of port cities based solely on cruise passengers [9].

Economy of scale is the future of modern cruises. Currently, the largest cruise ships can accommodate 6687 passengers, and the capacity of each of the 50 largest cruise ships in operation exceeds 3000 passengers. The average dimensions of a cruise ship are over 200 m long and 26 m wide with 3220 passengers, although the standard deviation is large and such numbers should be approached with caution. The average capacity of the cruise ship fleet first exceeded 2000 passengers in 2002 and 3000 passengers in 2006. Over the last 2 years, 24 ships were to be delivered, 6 of which were to accommodate more than 4000 passengers, and 4 of them even with 5000 passengers. In 2019, 407 ships had 600,000 berths, and in 2027, this number is expected to increase to 472 ships and 785,000 berths [9].

2.3. The Offer and Attractiveness of Parts and Port Cities

Cruise shipping began as the transportation of pleasure-hungry, upper-class travelers on seagoing vessels offering one or more ports of call in the United States and the Caribbean. It is now a highly effective global business. The use of modern specialist vessels, which are significantly different from cargo ships, the increasing number of ports of call and berths to ensure a great customer experience in port and at destination, and convenient transport to final destinations from relatively close embarkation points are some of the key factors in the maritime tourism market, which increase its attractiveness. These activities are carried out in specific markets, each with their own regional specificities, with the Caribbean and Mediterranean being the most important. This is mainly due to the geographical conditions of these regions [14].

The economic contribution of the cruise industry depends on the port category: home port or port of call. The home port is where ships start and end their voyage. However, a port of call is only an intermediate stop. Typically, a cruise passenger spends less than ten hours at a port of call. Cruises have a direct impact at home ports on almost every segment of the travel industry: transportation, hotels and resorts, restaurants, and attractions, etc. A significant proportion of cruise passengers spend a night or more at their destination waiting to board. The size of the destination and the tourist offer influence the intensity of the economic effects related to the cruise activity. Depending on the region where marine tourism takes place, the cruise industry must consider many factors related to onboard equipment, cruise routes, ports of call, and land trips [24]. The port is essential to ensuring the reliability of sailing schedules and allowing passengers to continuously disembark, embark, and continue onward journeys and/or day trips [22].

The competence of a given destination depends on the characteristics of the port and coast. The presence of sufficient port and port-related infrastructure, the absence of intensive use that could lead to congestion and the disruption of processes, and the modernization of infrastructure and processes to ensure efficient and effective port services are essential to enabling the port to be used as part of a travel itinerary. The condition of ports and their access to the berth, land infrastructure and logistics, and maritime services such as security, procedures, and baggage handling all have an impact on the development of cruises in a given port [9].

The success of a cruise port depends on five different factors that can make it a destination for call and cruise passengers [25]:

- The degree to which the port is well situated in relation to popular cruise routes, i.e., the attractiveness of the port in terms of its geographical location,
- The tourist attractiveness of a given region. It is determined primarily by the characteristics of the area (climate, socio-cultural, and/or natural factors or proximity to tourist attractions), with the port industry and stakeholders having only a secondary impact, i.e., enhancing "tourist-friendliness" through accessibility information and multilingualism,
- The accessibility of the destination/region, proximity to an airport with air links to source markets, a railway station with good connections, and access to highways that support the increasingly popular "drive and cruise" concept may determine the potential of the port in terms of handling turnover or just transit,
- Port infrastructure and services, with different types of equipment expected from transit ports and ports handling traffic,
- Harbor dues, which vary according to port, ship size, and country, etc.

The last two factors are generally the easiest to adjust compared to the other success factors. However, a port that scores worse in terms of location, tourist attractiveness, and accessibility than another port has no chance of leveling the scores by introducing a change in infrastructure/services or charges.

Cruise lines are restructuring their deployment strategies in an effort to better understand what best fits each case and what the strategies are for a global cruise presence. There are differences between markets and regions, the most obvious being differences in profitability. The emerging multi-regional development of the industry is directly related to changing geography.

To meet guest expectations, the cruise industry has innovated through the development of new destinations, new ship designs, new and varied onboard activities, and amenities and services, as well as a wide variety of shore activities. Most cruise ship operators work around specific cruise themes, which can vary in length depending on changing customers. Increasing affluence and an aging world population, the growing popularity of exotic destinations and resorts, and the increasing diversity in the tourism sector have contributed to the success of the cruise industry [9].

The ability of cruise ship operators to effectively apply supply push strategies makes the cruise industry very different from other shipping markets such as container shipping. Therefore, in most shipping markets, shipping activity is clearly derived from commercial activity and demand is rather price inelastic. Demand in the cruise industry is "created" through pricing and branding (marketing). Cruise operators are tasked with developing competitive cruise package offerings that include a high-quality stay on board, a variety of shore-based activities with access to different cultural and architectural sites, and easy transfers to/from the ship.

Ports offering services to cruise lines differ in many respects. The first group of criteria includes the nature of the facility, i.e., the presence of a dedicated terminal or pier or the use of a facility used for purposes other than cruises. The second criterion relates to the ownership of the infrastructure and operation of the terminal or facility. The third distinguishing criterion is the volume of passenger traffic handled during the year. The fourth criterion concerns the function of the port on the cruise route as a home port from which the cruise departs and/or ends, or as a port of call visited by the cruise ship during the cruise. The fifth criterion for the classification of cruise ports is the seasonality of calls, which combines the transport and tourist elements of cruises. The tourist element determines the type of attractiveness generated by a given port. Branded ports are world-renowned ports, absolutely essential for any cruise route, as they attract passengers and are the most attractive element of the cruise route. A Port of Discovery is one that is not world-famous, but gives you the feeling of discovering an unknown treasure. Some home ports are also branded ports.

For example, the three main home ports in the Mediterranean are Barcelona, Civitavecchia (Rome), and Venice. These are tourist centers that have a well-developed tourist infrastructure and an airport with direct international flights. Other ports of call are connected to Naples (Pompeii) and Livorno (Florence and Pisa).

The presence of various tourist attractions in a closer or further location means that destination cruise ports are not the only destination of the cruise ship visiting them. In addition to safety and security issues, these ports need to provide a range of high-quality cultural or physical activities, as neither excursions outside the port area nor significant facilities in its vicinity are important.

In addition, the expansion of the cruise business involves operations of considerable size. The latter phenomenon has contributed to the development of specialized port terminals that effectively serve passengers and, consequently, cruise lines. The example of the most important port of Venice shows that the number of 1.7 million cruisers per year is 47 cruise companies, 87 cruise ships, 3.3 million pieces of luggage, 51,000 cars parked in the parking lot, and about 33,000 people passing through the port every day in the high season. This requires a total area of 300,000 m^2, 93,000 m^2 of which covers walking areas, several berths, five car parks with over 2000 spaces, 123,700 m^2 of the sea basin, and 3431 m of quays, at which up to 12 ships can moor [9].

Dedicated cruise terminals attract ships and passengers and act as home ports whenever possible. Larger ports are developing more autonomous terminals that allow for the diversification of development models and reflect the specialization of cruise ships. All major ports in the United States have developed a range of cruise terminals operating under different ownership regimes, while approximately half of ports with more than 100,000 passengers in the Mediterranean have more than one cruise terminal.

Thanks to the positive direct and indirect impact that passenger cruises have on port cities or nearby tourist destinations, seaports serving cruises are gaining in importance. Port city–seaport exchange brings about mutual benefits. The seaport strengthens its competitive position in the international arena, while the port city and local tourism develop thanks to the influx of passengers, whose goal is more and more often not only to experience and relax on cruise ships, but also to explore port cities and their tourist attractions [26].

3. Sea Tourism in the Area of the Baltic Sea

3.1. Location and Characteristics of the Baltic Sea

The Baltic Sea is a body of water in northern Europe, connected to the North Sea and the Atlantic Ocean through the Danish Straits. The Baltic Sea is about 1600 km long and, on average, 190 km wide, with an area of about 385,000 km^2. Due to the shape of the coastline and the relief of the bottom, the Baltic Sea is divided into seven regions: Kattegat, Sound and Belt Sea, Baltic Proper, Gulf of Riga, Gulf of Finland, Bothnian Sea, and Gulf of Bothnia [27]. The Baltic Sea is relatively shallow. One of the shallowest areas is around the Danish archipelago, where narrow straits previously prevented vessels over 12 m from entering the rest of the Baltic Sea, but have now been deepened to a draft of 15 m. The average depths in other parts of the sea are—Baltic Proper, 65 m; Bothnian Sea, 68 m; Gulf of Bothnia, 43 m; Gulf of Finland, 37 m; and Gulf of Riga, 26 m. Nevertheless, the Baltic Sea drops sharply in some places, creating its so-called depths, and the deepest of them is 459 m deep and it is the Landsort depth. These large differences in depth result from the relief of the seabed. Its isolation from the Atlantic Ocean also protects the Baltic Sea from noticeable tidal currents and sea level fluctuations, although depending on the regional wind situation, water level changes can reach up to several meters [28].

The coastline of the Baltic Sea is highly developed and varied. It consists of a large number of lagoons, bays, peninsulas, islands, and islets. The coastal area in the northern Baltic Sea region, which still gently rises, is largely cut into the solid, ancient bedrock. This combination of rock type and uplift makes the local coastline strongly folded. Often, the coast rises extremely high above sea level, forming protruding escarpments in places. Such intricate and highly fragmented coastlines are particularly typical of the coasts of Sweden and Finland. The most unusual escarpments forming the coastline are in northern Estonia and the northwestern parts of the islands of Saaremaa and Gotland. Known, respectively, as the Baltic and Silurian wedges, they create amazing natural monuments. In the southern part of the Baltic Sea, the slowly sinking coastline is mainly the result of Pleistocene glaciations and subsequent sea level changes. Unlike the dramatic coastline of the northern part of the Baltic Sea, it is relatively smooth, low-lying, and featureless. Shallow bays divided by low promontories, shallow, rectilinear fjords, and shallow bays are the main features that intersect the coastline. In some places, sandbars covered with shifting dunes or vast sandbars cut off the characteristic lagoons from the open Baltic Sea (e.g., the Szczecin Lagoon and the Curonian Lagoon).

In the Baltic, we also find vast areas with many smaller and larger islands, referred to as separate archipelagos, found in many parts of the Baltic Sea (for example, the Danish, Stockholm, Åland, Turku, and west Estonian archipelagos) [29]. Some of the largest islands in the Baltic Sea also belong to similar groups; Saaremaa and Hiiumaa in the west Estonian archipelago and Funen (Fyn) and Zealand (Sjælland) in the Danish archipelago are good examples. The exception is the central Baltic, where a few isolated larger islands occur further off the coast of Sweden (for example, Gotland and Öland) [28].

The countries and parts of countries located on the Baltic Sea, which significantly depend on it in their economic activity, and, in particular, for the development of their external economic relations, form the Baltic Sea Region. A region is understood not only as a separate area, but also as a certain cohesion of areas. It is only possible to call a certain set of countries and/or parts of them a "region" if it meets all or some of the following criteria [30]:

- Historical similarities,
- Cultural make-up characteristics only for this group (material and intellectual culture),
- Geographical territorial integrity,
- The presence of certain similar features in the economy,
- Close economic, social and other internal ties,
- Cooperation in regional international organizations,
- Regional identity developed to varying degrees.

The countries lying on the Baltic Sea are Sweden, Finland, Russia, Estonia, Latvia, Lithuania, Poland, Germany, and Denmark. The Baltic Sea is the source of connection between Scandinavia and the countries of northern Europe. Initially, it was mainly used for trade, but over time and with its development, it has also become an area for the development of tourism. Many key cities are located along the Baltic coast, such as Copenhagen—the capital of Denmark, Stockholm—the capital of Sweden, Gdańsk and Gdyni—as the two main ports of trade and passenger exchange in Poland, Riga—the capital of Latvia, Tallinn—the capital of Estonia, Helsinki—the capital of Finland, and St. Petersburg—the main Russian port.

The Baltic Sea influences the development of the countries and territories located on its shores to varying degrees. It exerts a decisive influence primarily on the smaller Baltic states (Lithuania, Latvia, and Estonia) and the Nordic states (Sweden, Denmark, and Finland). For larger countries—Russia, Germany, and Poland—the Baltic Sea is one of many geographical directions of economic ties. However, it has a significant impact on their coastal territories.

The layout of the Baltic Sea and the number of countries and ports in its area became the basis for conducting a comparative analysis. The sections below present and compare the number of ports, the cruise routes offered, and the number of cruise ship visits to individual ports in the early years of the 21st century. The general numerical data and their mutual comparison intend to answer the question of whether and to what extent maritime tourism in the Baltic Sea area will develop. Are the countries surrounding the sea interesting enough to attract new tourists? The authors hope that the following analysis will answer the questions presented. In this paper, the comparative method was chosen. A number of data on maritime tourism from one decade of this century were searched and analyzed. The data concern the number of tourists, the number of ships, and the length of routes. The data compilation is intended to indicate the trend that can be observed in maritime tourism in the Baltic Sea area.

3.2. Passenger Shipping Connections of Baltic Ports

The Baltic Sea is one of the busiest passenger shipping areas in the world. The nine countries lying on the Baltic Sea have well-developed ferry connections with each other via numerous ports within the Baltic Sea [31]. Analyzing the map in Figure 1, we can see that Sweden and Finland have by far the largest number of ports and cities involved in passenger exchange, mainly due to the lengths of the coastlines that both countries have in comparison to the other Baltic countries. These countries also have the largest networks of international and domestic connections served by numerous operators. On the other hand, Denmark, due to its remote and problematic location in relation to the Baltic Proper, definitely has a difficult passenger exchange with the Baltic countries located in the eastern part (Finland, Russia, Estonia, Lithuania, and Latvia).

Figure 1. Map of ferry ports on the Baltic Sea. Source: Our Baltic website: www.ferryscan.com, (accessed on 10 July 2023).

Each of the passenger lines has its own cruise routes with certain operating frequencies, and a specific route is usually served by one cruise ship. The courses of the selected routes are shown in Figures 2–4. Most of them start and end in the same port, but we can also find routes from point A to point B.

Figure 2. Map No. 1 of selected cruise routes in the Baltic Sea region. Source: own study.

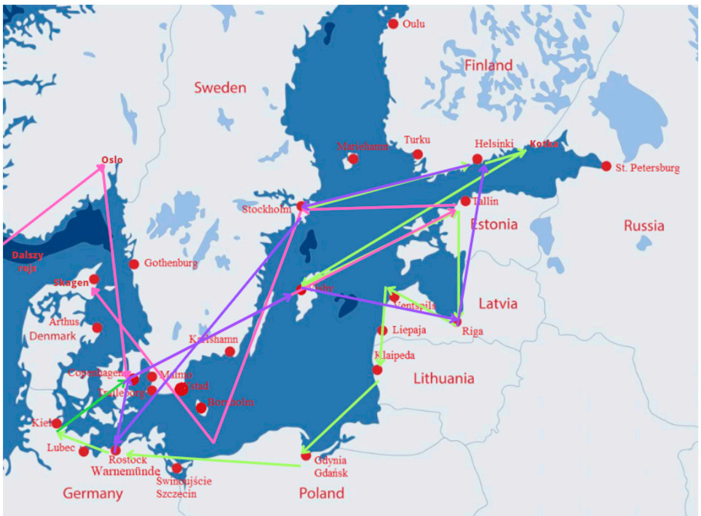

Figure 3. Map No. 2 of selected cruise routes in the Baltic Sea region. Source: own study.

Figure 4. Map No. 3 of selected cruise routes in the Baltic Sea region. Source: own study.

Figure 2 shows the following cruise routes:

- Green: Warnemünde → Stockholm → Gotland → Gdynia → Copenhagen → Warnemünde, an 8-day route on an AIDAdiva ship. The same ship also covers a short route to Gdynia and Copenhagen in 5 days: Warnemünde → Stockholm → Gotland → Warnemünde.
- Pink: Kiel → Bornholm → Gdynia → Kiel, a 5-day route on an MSC ship the MSC Fantasia.
- Purple: Warnemünde → Gdynia → Klaipeda → Riga → Tallinn → Helsinki → Stockholm → Copenhagen → Karlskrona → Warnemünde, a 12-day route on an MSC Poesia ship. The same ship sometimes ends up in Copenhagen within 10 days: Warnemünde → Gdynia → Klaipeda → Riga → Tallinn → Helsinki → Stockholm → Copenhagen.

In Figure 3, the following cruise routes are presented:

- Green: Stockholm → Helsinki → Kotka → Gotland → Tallinn → Riga → Klaipeda → Gdynia → Warnemünde → Kiel → Copenhagen, an 11-day route on the Norwegian Dawn; in this case, the cruise starts in Stockholm and ends in Copenhagen.
- Pink: Southampton → Oslo → Copenhagen → Tallinn → Stockholm → Skagen → Southampton, a 13-days route on the Celebrity Silhouette.
- Purple: Copenhagen → Gotland → Riga → Helsinki → Stockholm → Warnemünde → Copenhagen, 11-days route on the Nieuw Statendam.

In Figure 4, the following cruise routes are presented:

- Green: Kiel → Stockholm → Gotland → Tallinn → Helsinki → Riga → Kiel, a 10-day route on the Costa Fascinosa.
- Pink: Southampton → Bornholm → Gotland → Stockholm → Tallinn → Riga → Klaipeda → Gdańsk → Copenhagen, a 15-day route on the Island Princess ship.
- Purple: Southampton → Gdańsk → Gotland → Helsinki → Tallinn → Stockholm → Warnemünde → Aarhus → Copenhagen → Kristiansand → Southampton, a 15-day route on the SkyPrincess.

The routes shown in the pictures are some of the many routes offered by various carriers. Analyzing the presented routes, we can see that the main ports where cruise ships call are: Helsinki, Stockholm, Gotland (Visby), Tallinn, Riga, Copenhagen, and Rostock. Slightly less frequently, cruise ships call at ports in Gdynia, Gdańsk, Klaipeda, or Kiel. Arthus appears sporadically on the routes of the cruises. Kotka or Skagen and other ports are not on the routes of these liners.

4. Prospects for the Development of Sea Tourism

Maritime tourism in the Baltic Sea includes ferry shipping and cruise shipping, both forms of passenger transport that are very popular, both of which are characterized by different types of sea tourism. Cruise ships depart, on average, for 5–15 day cruises, on the route of which they enter ports and moor there, usually throughout the day, leaving in the evening, thus giving travelers the opportunity to visit the port city and take advantage of its tourist attractions. Ferry traffic is mainly a journey from point A to point B, lasting several hours or more. There are also ferries sailing for several dozen hours for longer distances, however, there are no such ferries in the Baltic Sea region. Ferries can be divided into domestic and international. Domestic ferries usually transport passengers between seaside resorts or archipelago islands, while international ferries are usually those with a longer journey time, and, thanks to them, passengers can cross to another country for tourist purposes, as well as for other purposes such as work.

4.1. Baltic in Statistics

The cruise industry showed dynamic growth between 1900 and 2010. Interest in cruises increased from 4.5 million passengers in 1995 to 9.91 million in 2001, and more than doubled over the next 10 years to 20.6 million in 2011. The main cruise regions are: the South American market, the Caribbean, the Bahamas, the west and east coasts of North America, the European market with the main Mediterranean and Baltic sub-markets, and the Asia–Pacific market [32].

Passenger cruise shipping in the Baltic Sea can be divided into four segments. Small, from 0 to about 24 calls, in which we find such ports as Kotka, Lubeck, Malmo, or Turku. Average, from 0 to 49 calls, i.e., Karlskrona, Aalborg, or Gdynia. Large, from 50 to 199 calls per year, this segment includes Riga, Rostock, Visby, and Gothenburg. Very large, with over 200 calls a year, these ports include Copenhagen, Stockholm, Kiel, and Helsinki.

Baltic cruise traffic enjoyed a huge increase in the years 2000–2019; over the years, the number of cruise ship calls in the Baltic Sea region has almost doubled. However, 2020 brought a 96% loss compared to the previous year, and the effects of the global pandemic were also felt in 2021. However, 2022 was a year of returns, which can be seen in Figure 5, with an increase of 273%. The estimated results for 2023 are slightly lower than last year, however, ports are slowly returning to "normality" before the outbreak of the pandemic [33].

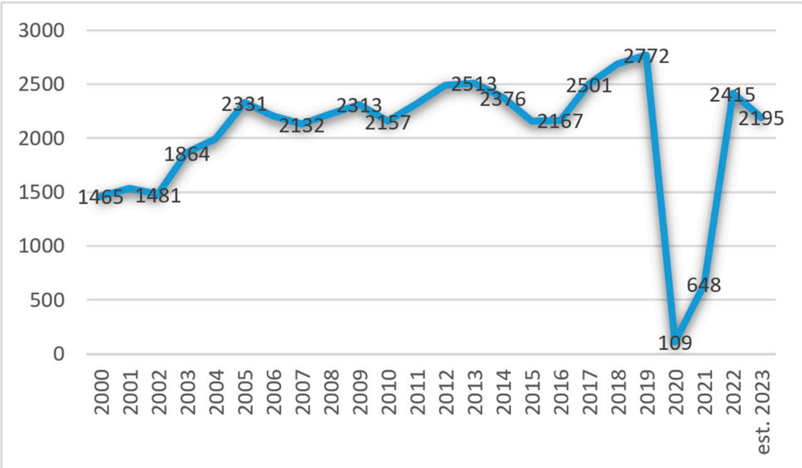

Figure 5. Number of cruise ships calling at the Baltic Sea in 2000–2022, with an estimate for 2023 (Norway is also included in the statistics). Source: Own study based on Cruise Baltic and Cruise Europe websites [34,35].

The situation was similar in the case of the number of cruise passengers in the Baltic Sea (Figure 6), where 2000–2019 shows a continuous increase. The number of passengers on the Baltic Sea was about 1 million in 2000, while in 2019, there were a record-breaking 6 million passengers entering the Baltic Sea on cruise ships. The decrease in the number of calls also shows a passenger decrease in 2020 by 98%. Despite the fact that 2022 had a huge return in the number of calls, the number of 3.5 million passengers is far from the number from 2019.

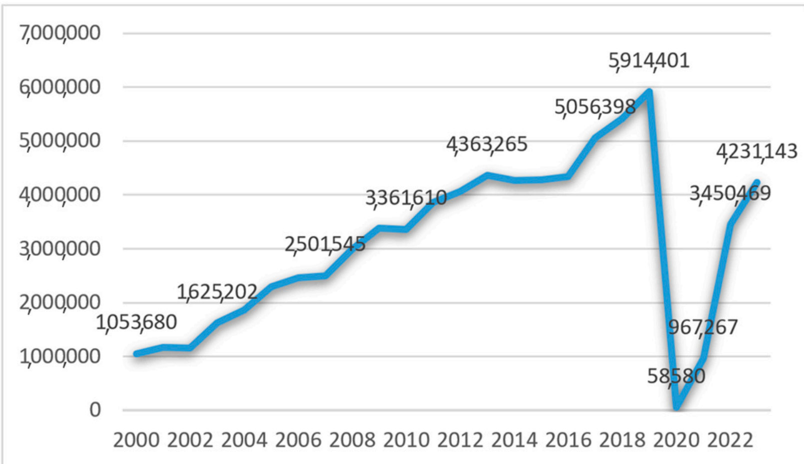

Figure 6. Number of cruise passengers in the Baltic Sea in 2000–2022, with an estimate for 2023 (Norway is also included in the statistics). Source: Own study based on Cruise Baltic and Cruise Europe websites [34,35].

Passenger cruise traffic in 2017–2019 enjoyed growing popularity, which meant that the main ports on the Baltic Sea handled a larger number of vessels (Table 2) and their passengers (Table 3). Copenhagen, thanks to its location in the Danish straits, definitely enjoyed the greatest interest at that time, followed by two other capitals, Stockholm and Helsinki. Gdynia is a representative of less touristic destinations, but also with an upward trend in 2017–2019.

Table 2. Calls of cruise ships in selected Baltic Ports in 2017–2022 with estimation for 2023.

	2017	2018	2019	2020	2021	2022	est. 2023
Stockholm	264	268	279	28	96	205	140
Helsinki	266	285	303	0	14	164	164
Copenhagen	325	343	348	0	46	323	289
Rostock	190	206	196	1	47	139	140
Gdynia	41	54	54	1	13	41	38

Note: Source: Own study based on Cruise Baltic and Cruise Europe [34,35].

Table 3. Cruise ship passengers in selected Baltic Ports in 2017–2022 with estimation for 2023 (in thousands of passengers).

	2017	2018	2019	2020	2021	2022	est. 2023
Stockholm	600	619	656	20	232	252	220
Helsinki	478	520	603	0	11	162	162
Copenhagen	850	869	940	0	30	535	565
Rostock	641	657	634	0.2	94	294	300
Gdynia	88	95	100	0.072	26	57	50

Note: Source: Own study based on Cruise Baltic and Cruise Europe [34,35].

In 2020, there were huge losses for all ports related to the global pandemic, which resulted in the stoppage of tourism due to numerous restrictions. Ports recorded huge decreases in the number of cruise ships accepted, and thus passengers, as shown in the charts below (Figures 7 and 8). The ports of Helsinki and Copenhagen did not welcome any cruise ships, thus recording a 100% decrease. According to Cruise Baltic data, one cruise ship called at Rostock and Gdynia, which brought 200 and 72 passengers, respectively, to both ports. Sweden ranked best in this ranking with 28 served cruisers. According to Cruise Baltic data, in 2020, about 30% of Baltic ports with Norwegian ports located within the Baltic Sea recorded any calls. In 2021, things looked better in terms of statistics. Stockholm this year recorded a 3-fold increase compared to the previous year, and other ports also demonstrated increased activity. In 2022, reconstruction occurred for all ports and huge increases were seen after the declines in 2020; 2022 compared to 2021, in terms of calls of passenger shipping for Stockholm, brought a 2.5-fold increase, Helsinki increased its statistics 11-fold, Copenhagen 7-fold, and Rostock and Gdynia triply increased. However, higher numbers of cruise ship services are not synonymous with an increase in the number of passengers arriving at ports, which can be seen in the example of the Swedish capital. Other ports, however, were more popular.

Copenhagen, Stockholm, and Helsinki are the ports serving the largest number of cruise ships on the Baltic Sea, next to ports such as Tallinn or St. Petersburg; in the years before the pandemic, they handled from 250 to 350 units annually, thus having an annual share of 11–13% in terms of the number of calls. Rostock ranks second, with ports such as Kiel and Oslo included in the Cruise Baltic statistics as some of the Baltic ports, thus having a share of 6–8%. Gdynia ranks quite low as a port, with an average of around 50 calls per year, next to ports such as Goteborg, Klaipeda, Ronne, Skagen, and Aalborg, with a 2–3% share. Up to and including 2019, the ports held their position in the Baltic Sea quite firmly, but the pandemic had a huge impact on port statistics and the return to "normality" in 2022 caused changes; Sankt Petersburg does not participate in passenger exchange as a result of the ongoing war between Russia and Ukraine. Copenhagen was able to recover and even improve its situation, with a 23% share in 2022. Similarly, Stockholm and Rostock recorded a 3% increase in share compared to 2018. The global situation in 2019–2020 meant that Helsinki and Copenhagen, some of the two largest participants in cruise shipping in the Baltic Sea, almost disappeared from the map of Baltic cruise ports (Figure 9). In terms of the number of passengers of the previously mentioned cruise ships, the share situation of the ports of Copenhagen, Helsinki, Stockholm, Rostock, and Gdynia in the Baltic Sea region was similar to the number of calls at the ports, as shown in Figure 10.

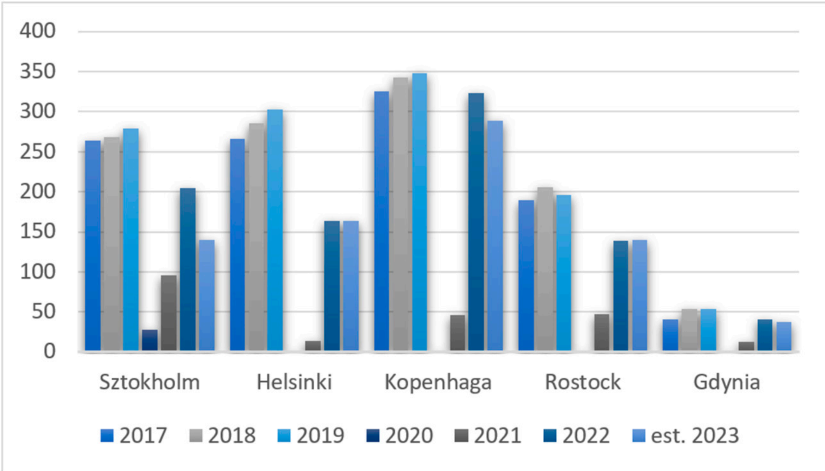

Figure 7. Cruise ship passengers in selected Baltic Ports in 2017–2022 with estimation for 2023 (in thousands of passengers). Source: Own study based on Cruise Baltic and Cruise Europe websites [34,35].

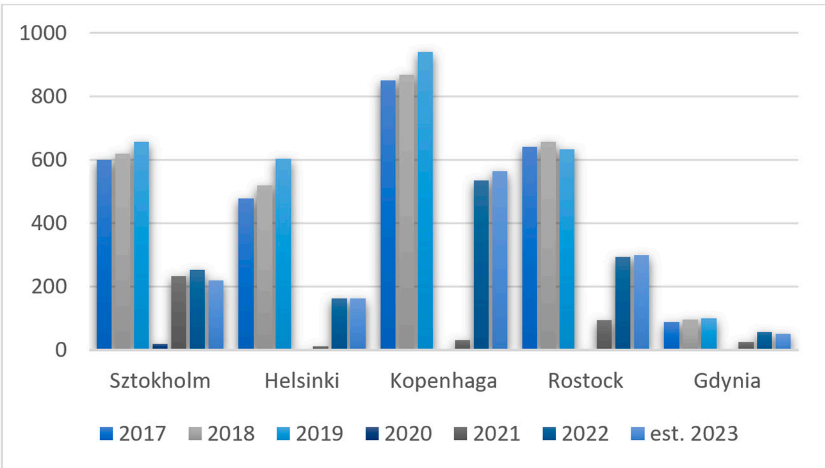

Figure 8. Calls of cruise ships in selected Baltic Ports in 2017–2022 with estimation for 2023. Source: Own study based on Cruise Baltic and Cruise Europe websites [34,35].

Ferry shipping can be defined as a type of liner trade, in which passengers and cargo travel from one market, yet it is a convenient means of transport, especially in the cases of archipelagos or countries located around water bodies. The main operating regions of ferries are the Mediterranean, northern Europe, America, and southeast Asia. Nevertheless, in such directions as towards America, Asia, the Pacific, or the Red Sea, ferries are used only as a means of transport. Maritime tourism based on ferry shipping is highly developed in Europe, mainly in the Baltic Sea, the North Sea, the English Channel, and in some Mediterranean basins [32].

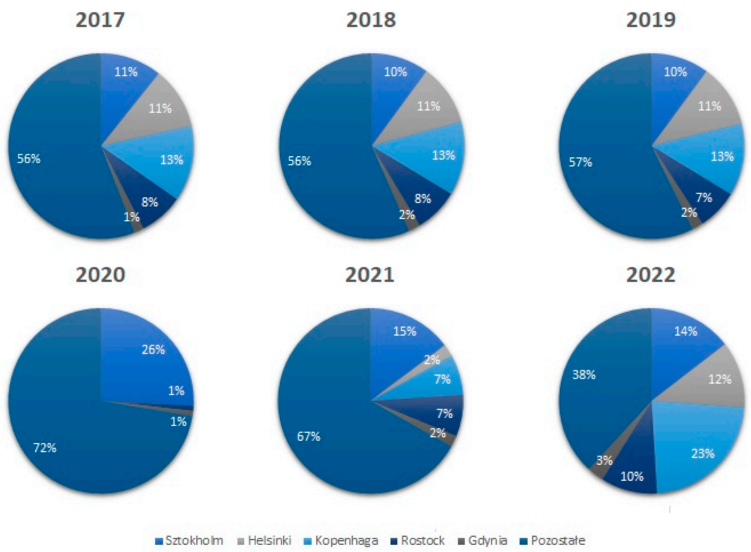

Figure 9. Percentage share of selected Baltic Ports in 2017–2022 in the Baltic Sea arena in terms of the number of cruise ships calling at ports. Source: Own study based on Cruise Baltic and Cruise Europe websites [34,35].

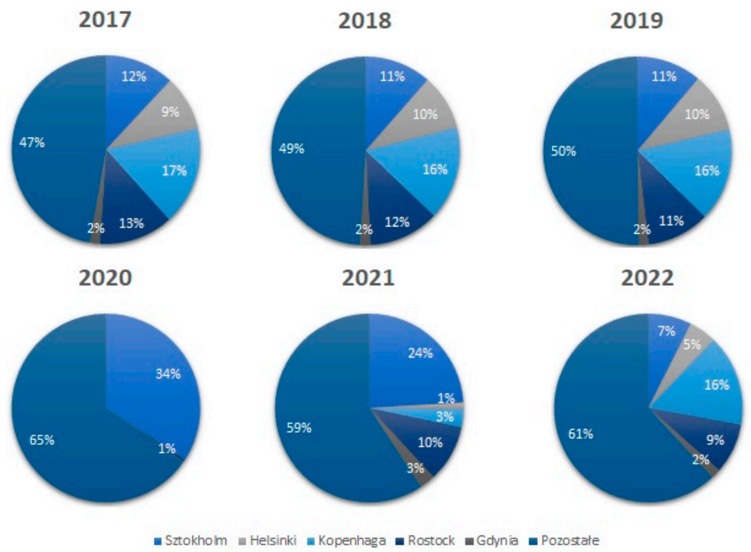

Figure 10. Percentage share of selected Baltic Ports in the years 2017–2022 in the Baltic Sea arena in terms of the number of cruise ship passengers. Source: Own study based on Cruise Baltic and Cruise Europe websites [34,35].

The Baltic Sea is one of the main regions of ferry shipping, used by millions of passengers annually. According to Eurostat data [36] (Figure 11), we can observe an increase in 2000–2007 from 110 million passengers to 118 million, then, in the next 6 years until 2013, a decrease followed by an increase, and, in 2019, we have a record value of 120 million. The year 2020 brought a huge decrease of less than 50% to 65 million due to the COVID-19 pandemic prevailing this year, which also persisted in 2021, which means that, despite the increase compared to 2020, the result is very low on the whole scale. The year 2022 is a year in which we see a significant improvement compared to the results of 2020, and the increase compared to 2021 is about 30%, thus giving 93 million passengers using ferry services on the Baltic Sea. The estimated result for 2023 is approximately PLN 100 million [37].

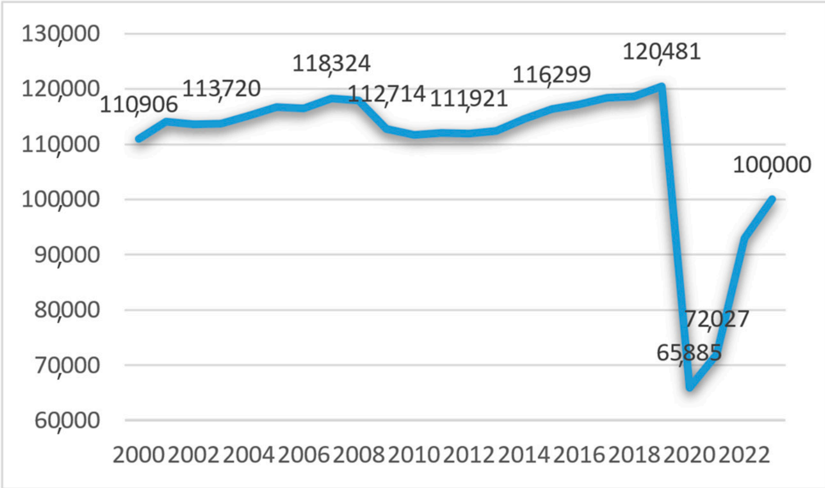

Figure 11. The number of ferry passengers in the Baltic Sea in the years 2000–2022, including the estimation for 2023 (in thousands of passengers). Source: Own study based on the statistical office of the European Union—Eurostat [36].

Stockholm and Helsinki are the capitals of Baltic Sweden and Finland, and they are also located on archipelagos, which attract with a unique offer for outdoor and nature lovers and supporters of large metropolises or urban hustle and bustle. Thus, they are the largest ports in the Baltic Sea in terms of ferry traffic (Table 4, Figure 12). Copenhagen, which is the capital of Denmark, despite its tourist values and convenient location in the Danish straits, does not have a developed ferry exchange, mainly due to the small number of ferry connections it has with other countries. Gdynia, located in Poland, is similarly situated, however, Gdynia competes with the nearby port of Gdańsk, which means that passenger exchange is divided between both ports.

Table 4. Ferry exchange passengers in selected Baltic Ports in 2017–2022 (in thousands of passengers).

	2017	2018	2019	2020	2021	2022
Stockholm	8460	8377	8174	1906	4425	7400
Helsinki	11,781	11,569	11,619	4756	3736	7938
Copenhagen	781	775	789	183	133	574
Rostock	2310	2516	2506	1364	1689	2500
Gdynia	760	803	791	450	527	600

Note: Source: Own study based on the statistical office of the European Union—Eurostat [36].

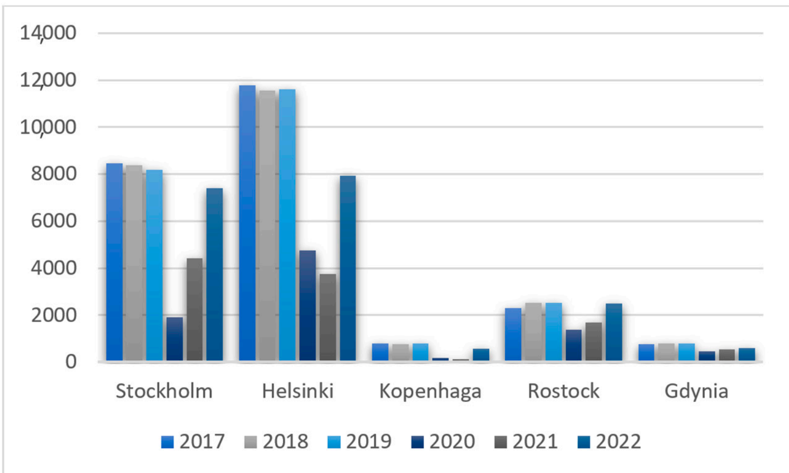

Figure 12. Ferry exchange passengers in selected Baltic Ports in 2017–2022 (in thousands of passengers). Source: Own study based on the statistical office of the European Union—Eurostat [36].

For cities–ports, tourism is a huge financial profit; the greater the number of passenger vessels calling, the greater the number of passengers arriving at the port and the city, and thus the profit. Both ships and passengers generate profit for the port in the form of all kinds of port fees or purchases of personal items in the port area at ferry terminals by both passengers and crew. In addition, ferry travelers staying in a given city for at least a day or two or cruise passengers spending their time in port-related areas while the ship is in the port use various types of facilities by spending funds. Assuming that, on average, one person spends around EUR 50 per day, with 100,000 people, we have a profit of EUR 5 million, which is about PLN 23 million at the current exchange rate. The Port of Stockholm estimates that, on average, a day-only passenger spends EUR 72 per day and a crew member around EUR 48, while passengers who stay in the city for longer spend up to EUR 256 per day.

To sum up, in 2022, the tourist market and sea passenger traffic are not still widely affected by the COVID-19 pandemic and the lifting of restrictions introduced due to the coronavirus pandemic had a positive impact on the passenger service sector; thus, the ports recorded an increase in traffic [38]. Nevertheless, when analyzing the Cruise Baltic data [34], it can be seen that, as a result of the pandemic, ports suffered huge economic losses, and, despite a clear improvement compared to 2020–2021, this is not the 2019 level at the moment. In addition, the outbreak of the Russian–Ukrainian war in Europe means that the port in St. Petersburg, which was one of the important passenger exchange points on the Baltic Sea with a share of about 14% per year in the case of cruise shipping, has disappeared from the Baltic tourist map [39].

4.2. Directions of Development of Maritime Tourism in the Baltic Sea Region

In the last three decades, maritime tourism has been one of the fastest-growing sectors of the tourism economy. The main factors influencing its development result from the external environment, which include economic, social, and political factors. The growing interest in tourism results from the relatively high standard of living of today's society. A good economic situation and rising incomes create effective demand. Social factors, such as the growing amount of free time, the desire to take a break from work, and general fatigue, draw attention to tourism as a way to spend time and explore new, interesting places. The stabilization of the political situations in passenger shipping destinations is conducive to its development. The increased interest in international maritime tourism was particularly influenced by integration and facilitations in the form of visas or the opening of internal borders in European countries [40].

Maritime tourism has an increased demand on land, both on the port side in the sense of all terminal and port services for ships and passengers, and on the region and city side, including mainly accommodation, gastronomy, transport, entertainment, shopping, and culture. Its development is influenced by many internal factors dependent on seaports and passenger carriers, as well as the port cities and enterprises operating in them. Cruise and ferry carriers generate demand through an offer addressed to travelers, the attractiveness of which depends on the number, frequency, and types of routes, the modernity of ships, and the attractions and facilities on them. The attractiveness of port cities and the areas around ports is influenced by the offer and possibility of excursions on the shore, as well as tourist and transport infrastructure [32].

The cruise market in the Baltic Sea is characterized by a high seasonality due to the climatic conditions in northern Europe and is highly competitive. The season starts around the end of April and usually lasts until the end of September, with the largest number of ships calling at Baltic towns in June, July, and August [41]. The number of cruise ships calling at a given port, in addition to internal conditions such as tourist attractions, transport and tourist infrastructure, and the quality of logistics on land, depends, to a large extent, on the marketing of a given port, promotion of the location, and interest of potential customers, as well as aspects distinguishing a given destination from the rest of the world. Cruise passengers are organized groups whose main purpose is sightseeing, they do not use accommodation facilities, and their activity is focused on visiting attractions and monuments, cuisine, and culture [32].

The availability of berths dedicated to cruise ships, along with the close location to the terminal building, as well as public transport or the city center, are crucial due to the short, usually 8–10 h stay of such a vessel in the port, which is associated with limited time on land for passengers of cruises. Moreover, the services provided to these vessels, such as pilotage services or any land services (supply and waste collection) are an important aspect of the choice of ports on the cruise routes. Thus, cruise operators often create their itineraries based on the overall availability and services at a given seaport, in order to ensure that their passengers can make the best use of the time during which the ship is moored in the port.

The cruise market on the Baltic Sea is heavily involved in Cruise Baltic, which has been operating for 19 years, i.e., a B2B (Business to Business) network consisting of 31 Baltic partner ports and destinations. The goal of Cruise Baltic is to integrate ports and regions together with cruise operators and travel agents in order to promote the Baltic Sea Region and offer high-quality services to customers, as well as unforgettable experiences for passengers, creating an easily accessible platform for planning and receiving information. The company collects and provides all the necessary information, ranging from destinations, attractions in cities and upcoming events, port information, development strategies, statistics, reports, and much more.

The sea cruise market is very popular and, despite its seasonality, has a strong position, mainly because car or air transport cannot replace it. Huge passenger ships offer a wide range of passenger services on board and modern solutions. On board cruisers, we can find swimming pools, deckchairs, jacuzzi, spa zones, gyms, basketball, football, volleyball, and tennis courts, and theater with numerous magic, acrobatics, and dance shows. There are casinos that are overcrowded mainly in the evenings, right next to clubs with a dance floor and filled with music. There are numerous bars and restaurants where travelers can enjoy local meals. Over a dozen deck cruisers offer almost everything that can be found in any medium-sized city. The years of building vessels in the Baltic Sea begin around March 2002, with the vast majority being built around 2010. There are also recently built vessels from 2018–2019; most of the ships built before 2017 have undergone modernization to adapt them to the prevailing standards. Operators offer travelers a wide range of routes and cruises of various lengths, usually from 5 to 15 days, which allows travelers to choose a cruise that is convenient for them.

A much greater demand for land services is generated by ferry shipping, which is an important segment of maritime tourism in the Baltic Sea. Ferry passengers are much more likely to stay in given regions for longer, thus using more tourist attractions and hotel facilities. Ferry traffic is much more important for service providers than cruise traffic, due to the regularity of connections and the simultaneous transport of passengers, vehicles, and goods throughout the year, with a possible increased frequency of connections during the tourist season due to greater demand. Ferry shipping has long been a major branch of maritime transport that has established the Baltic Sea Region as one of the leading ferry markets in the world [42].

The Baltic ferry passenger market can be divided into three sectors, taking into account the economic and geographical aspects of the regions [43]:

- Western, including connections: Denmark–Sweden, Denmark–Norway, Denmark–Germany, Germany–Sweden, and Norway–Germany,
- Eastern, including connections: Sweden–Finland, Sweden–Estonia, Finland–Estonia, and Finland–Russia,
- Central, including connections: Poland–Sweden, Latvia–Lithuania, Lithuania–Germany, and Latvia–Finland.

The fleet of ferries in the Baltic Sea is one of the youngest in the world, and the average life of a unit is 15 years [42]; carriers provide a number of additional services on ferries in order to increase the attractiveness of the cruise. The range of services includes dining, entertainment, and shopping services. However, in the case of larger ferries with a longer journey time, such as Stena Line ferries operating between Gdynia and Karlskrona, you can also use accommodation and accommodation services. In addition, as tourist operators, ferry operators also provide additional services, such as transfers from or to the port or cruise packages.

In recent years, due to the high development of air transport and the emergence of a wide range of cheap air connections in the north of Europe, ferry transport has been struggling with high competition from air traffic, mainly related to much shorter travel times for further destinations. The expansion of land infrastructure has also forced ferry operators to look for alternative solutions. At the end of the 20th century, the construction of a bridge and tunnel crossing over the Great Belt was completed, connecting two Danish islands, Zealand and Funen, and the Oresund Bridge over the Öresund strait, which connects the Danish capital of Copenhagen with the Swedish city of Malmo. This is a bridge put into use in 2000, which eliminated the then ferry traffic between these cities [42]. Currently, another huge investment is underway, the completion of which is planned for 2029, and the project involves connecting Germany and Denmark through a railroad tunnel. The connection is to ensure efficient communication between the German island of Fehmarn and the Danish island of Lolland, which will result in shorter transport times compared to the time needed for ferry transport. The tunnel is intended to enable a rail connection between Copenhagen and Hamburg, and the journey time is estimated at 2.5 h. This investment will pose a significant threat to existing connections from the nearby German ports in Lübeck, Rostock, and Sassnitz, due to the fact that part of the transport of passengers and goods will take place through the Fehmarnbelt tunnel. The estimated investment cost for 2015 amounted to approximately EUR 7.5 trillion, which means that ports count on high tunnel tolls, which will reduce its competitiveness [44].

Strengthening land tourism through investments connecting Baltic towns by land and air tourism through the expansion of the network of low-cost airlines, allowing for faster travel, threatens the hitherto strong position of tourist ferry shipping. Ferry carriers must face market requirements and adapt their offer to economic needs. It is possible to achieve a strong competitive position thanks to a comprehensive offer addressed to various types of customers, as ferry traffic can serve both pedestrian and vehicle passengers. Over the last two decades, the ferry market has been maintained or even slightly increased, but compared to the increase in the popularity of cruises in the same years, the increase in ferry passenger services on the Baltic Sea can be classified as rather low. This does not mean, however, that ferry traffic has no chance for further development. Seaports are investing in the expansion of quays for servicing passenger vessels and ferry terminals with numerous amenities.

5. Summary and Final Conclusions

The aim of the work was to analyze the changes that have taken place in recent years in the field of maritime tourism in the Baltic Sea region and the actions taken by the participants of passenger exchange towards its development. The analysis was carried out on the basis of the collected statistical data and information posted on the websites of passenger carriers operating in the Baltic Sea and the websites of seaports, port regions, and cities, as well as with the help of research and articles that enabled a credible and reliable analysis of the changes and investments in the Baltic Sea area.

The last 20 years have been characterized by high economic development, an increase in the demand for services caused by the constantly increasing standard of living, and international cooperation, which has contributed to the opening of borders and numerous visa facilitations, as well as a greater awareness and availability of information. Baltic Ports and cities are constantly diversifying their offers and expanding their infrastructure through individual activities, as well as city–port cooperation. Each of the considered Baltic ports has recently completed or started investments aimed at increasing the transport and passenger accessibility of the port from the sea or land side, i.e., the reconstruction of quays, construction of modern ferry terminals, and improvement of access to the port through the construction of road and rail networks, etc. Ports expand terminal and access infrastructure not only to encourage passengers. Their offer is mainly addressed to carriers who, in the later process, choose a given port due to its infrastructure and accessibility, as well as competitive rates. They create routes and networks of connections between ports with specific frequencies, based on the availability of ports, as well as the offer of the city or area in which the port is located. The sheer number of berths and the modernity of the terminals will not encourage passengers to visit a given destination.

Socio-cultural attractiveness, culinary, and entertainment offers are important aspects of choosing a destination by tourists. Lithuania, Latvia, and Estonia are Baltic countries, culturally close to each other, in which the influence of Scandinavian and German culture meet in connection with historical and geographical aspects. Poland and Germany lie next to each other for easy access within the countries, as well as to the southern part of Europe. Denmark, Sweden, and Finland are Scandinavian countries characterized by an extremely cold climate. These countries are rich in nature and culture. All of the Baltic cities and regions have a great tourist offer, which is addressed to various recipients. In each of these places, there are permanent elements such as museums, art galleries, numerous restaurants, and outdoor and sports attractions, etc. Poland and Germany definitely win in the ranking of accessibility to southern Europe and transport connections. Nevertheless, Sweden and Finland are huge, northern European countries whose nature is second to none and, in terms of nature, none of the Baltic countries can compete with them. In addition to the attractions located in the port regions, Baltic cities are constantly expanding their tourist offers by building new socio-cultural spaces and transport facilities within the regions.

Ports located on the Baltic Sea implement development strategies, carrying out investments and projects in response to the growing interest in maritime tourism. Carriers diversify their offers and the number of routes in order to meet the expectations of travelers, introducing more and more modern vessels into service, on which passengers receive numerous amenities. Some cruise ships currently sailing on the Baltic Sea have a list of attractions that can be found in a medium-sized city. Each of the Baltic regions is distinguished by something unique, but also offers attractions and facilities aimed at a wide range of recipients. From lovers of relaxation to active travelers in different age categories, as well as for people with lower and larger budgets.

The difficulties encountered during the implementation of the work were related to the general nature of information on the investments carried out in seaports, as well as the lack of updating certain port information on the official websites of ports. The number of ports and carriers in the Baltic also causes discrepancies in quantitative data, depending on the data source.

To sum up, due to the fact that many elements affect the quality and diversity of the attractiveness of the tourist offer of given cities, ports, and carriers, and considering the aspect of maritime tourism, each of these centers is dependent on each other and their close cooperation in creating a comprehensive offer, as well as development strategies, is key to maintaining a high competitive position and attracting potential recipients of services. It is difficult to clearly determine when maritime tourism in the Baltic Sea Region will reach another record result. Currently, Baltic seaports are trying to rebuild their positions in the passenger market after almost two years of downtime. The results for 2022, which was still characterized by a rather difficult economic situation related to the outbreak of the Russian–Ukrainian war, and huge inflation not only in the Baltic countries, but around the world, brought good results looking at this year as a period of return to “normality” from 2019. Not taking into account in particular the statistics from 2020–2021, the decrease in which did not depend on the ports but on the global situation, and based mainly on statistics until 2019, which was a breakthrough year for many seaports both in the ferry tourism sector and for cruise lines, as well as the adopted strategies or development projects of the ports and the investments already completed, we can conclude that passenger seaports have a chance for further development and increase in turnover in the future due to the currently growing interest in tourism in general, as well as in maritime tourism.

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