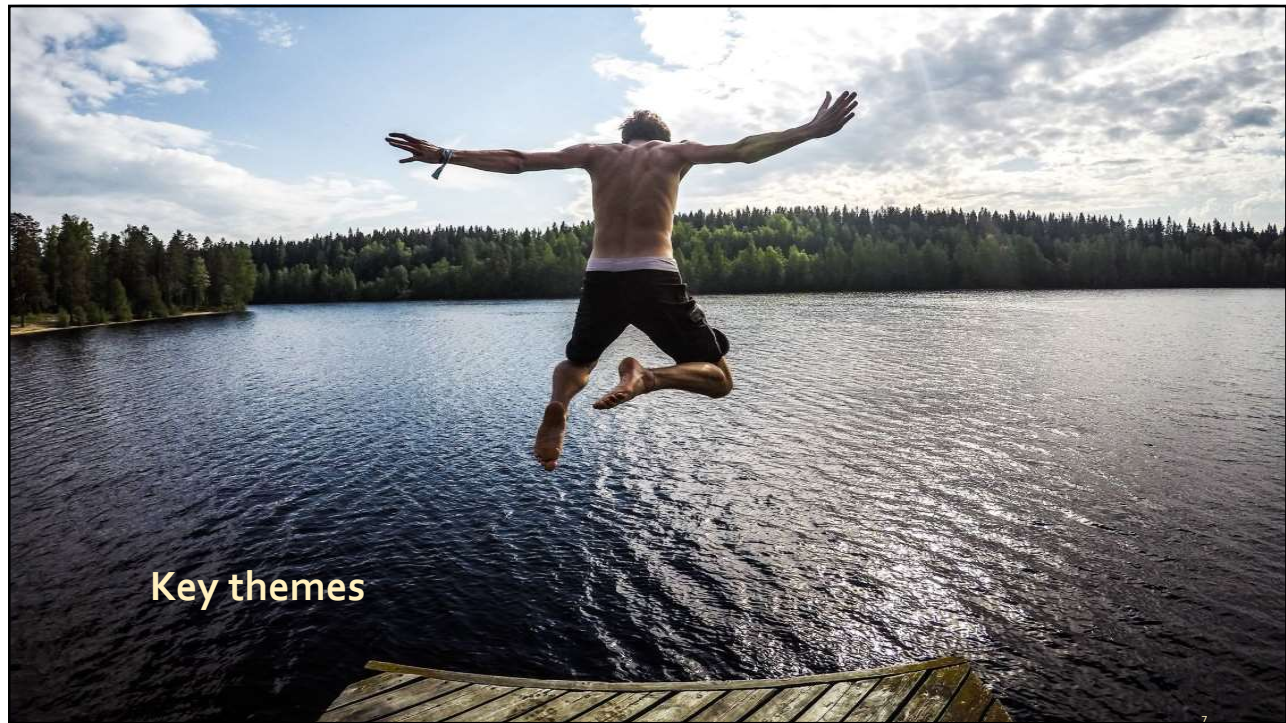


Who are we?







Digitalisation and Smart destinations

- Nordic ministers are encouraged continue to prioritise digital development and technological innovation in tourism
- Pool resources and learn from the extensive work which has already been carried out on digitalisation policies for other sectors
- Create a forum for new and disruptive ideas within digital tourism with focus on smart destinations, smart mobility and connectivity. Draw on the experience, expertise and work of key industry actors
- Establish a Nordic network for Smart Destinations



Sustainable development in tourism

- Clear objectives and priorities for collaboration on sustainability goals in tourism are needed, both on national and Nordic levels
- A Nordic roadmap for sustainable tourism should be created and ambitious and measurable goals set
- A Nordic Tavel tech network should be established: A platform for collaboration between public and private actors, technology developers and investors.



Marketing Nordic Destinations

- Cooperation on developing long-haul markets is an obvious topic of mutual interest
- Opportunities of developing the Nordic Brand further should be explored in closer cooperation with the tourism sector
- Extend existing collaboration structures such as VestNorden and NATA to other Nordic destinations

11

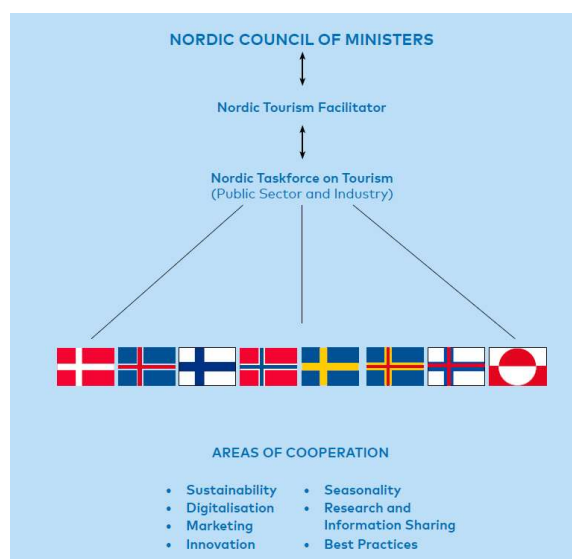


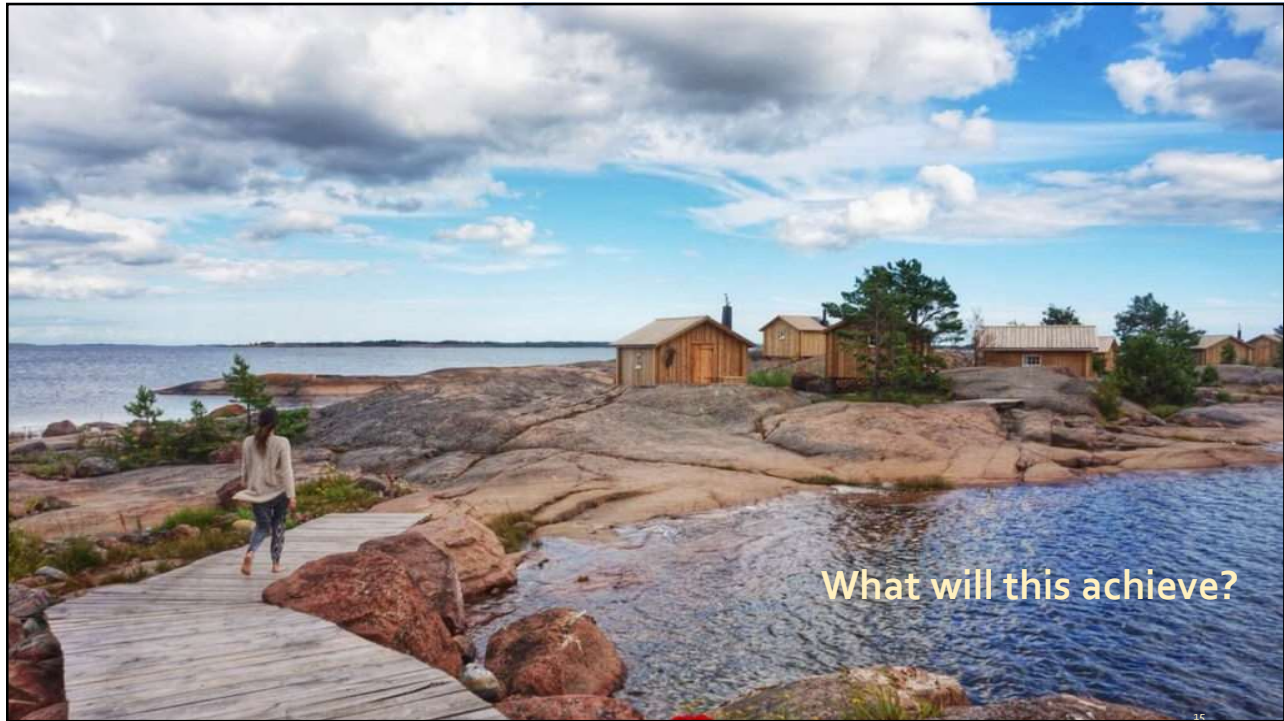
Seasonality, destinations and competitiveness

- Strategic effort to encourage innovation, business development and new business models in the tourism sector to increase competitiveness and sustainability
- New Nordic networks for knowledge sharing and best practice should be encouraged
- There are plenty of good practices and tools in the Nordic "toolbox" for DMP. These need to be shared more effectively and developed further

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How can it be done?





PLAN FOR NORDIC TOURISM CO-OPERATION 2019-2023

PLAN FOR NORDIC TOURISM CO-OPERATION 2019-2023

In 2017, the Nordic business ministers (MR-Growth) decided that a Nordic plan for co-operation within tourism should be compiled. A working group was established to develop the plan. This Nordic tourism plan for the period from 2019-2023 highlights the business ministers' priorities, unfolding in the four strategic themes:

- **Competitive Nordics**
- **Innovative and smart Nordics**
- **Sustainable Nordics**
- **Attractive Nordics**

The Nordic tourism policy analysis serves as an important input to the Nordic tourism plan.

PLANNING FOR A MORE SUSTAINABLE TOURISM?

A status report of a Pan Nordic analysis of
Regional Tourism Strategies for rural areas

Ágúst Bogason



MAIN OBJECTIVES OF THE RESEARCH

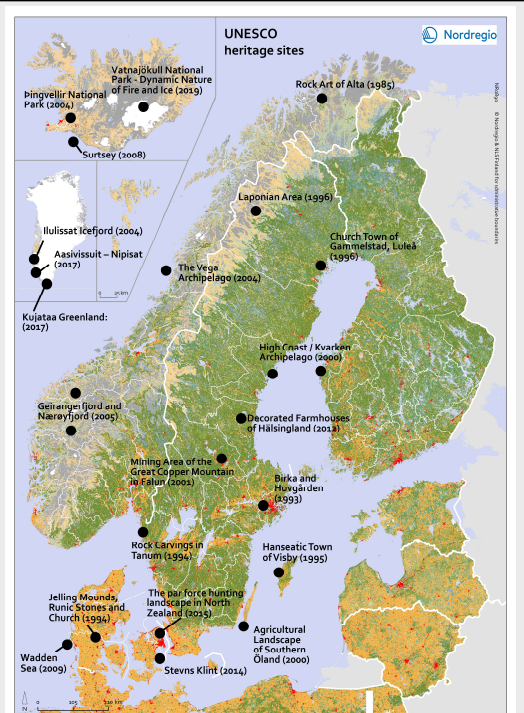
- How can we transfer Tourism Satellite Accounts (TSA) to regional level of analysis so we better understand the local and regional economic impacts of tourism
- Analyses on regional destination management plans
- Comparative study on Nordic value of the freedom to roam – and sustainable development of rural tourism
- Case studies in 2020



Ágúst Bogason
28.November 2019

RELEVANCE OF PAN-NORDIC RURAL TOURISM STUDY

- Tourism development seen as increasingly important source of employment and economic growth in rural areas.
- Environmental and landscape qualities, including cultural landscapes and social experiences, often form main selling-points for rural tourism.
- Climate change emergency, while tourism projections sky-rocket and tourism pressure increase in the Nordic countries (Sandell & Svenningen, 2011; Øian, Fredmann, Sandell et al, 2018).

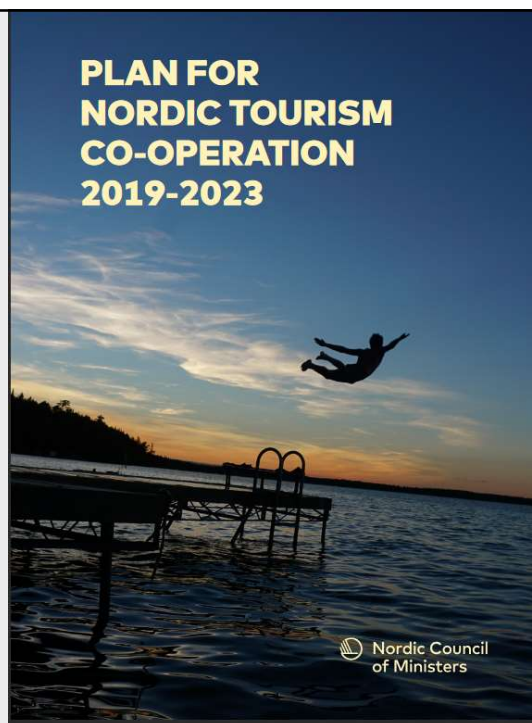


RELEVANCE OF PAN-NORDIC RURAL TOURISM STUDY

- Tourism as source of place development, innovation and transformation?
- Interest within Nordic Council of Ministers to increasingly learn from neighbouring Nordic countries' tourism development.
 - Input into Nordic cooperation in tourism (strategy approved primo 2019)
 - Transferring TSA's to regional level within Nordic Countries, what will it take?



PLAN FOR NORDIC TOURISM CO-OPERATION 2019-2023



Common problems expressed in tourism

- Speaking to relevant actors in rural tourism in the Nordics provides accounts of different conflicts in relation to increased tourism:
 - Social tolerance
 - Land use / The right to roam – almannsrätten
 - Carrying capacity
 - Cruise ships
 - Taxation or fees for entry / access payments
 - Monitoring...
 - ...Others say they are being left out of the tourism boom

WHY DESTINATION MANAGEMENT PLANS?

- DMP are supposed to be “bottom up” visions of the locals for the development of tourism in their region
- How do the regions define themselves? What is their focus point?
- How do the regions want to develop tourism in a sustainable way?
- Presented as a tool to tackle problems and conflicts caused by tourism
 - Looking into how (if) they are addressed in these documents?
 - e.g. cruise tourism and the right to roam

When the “marketing lingo” has been trimmed away, what remains?

THEORETICAL DISCUSSIONS

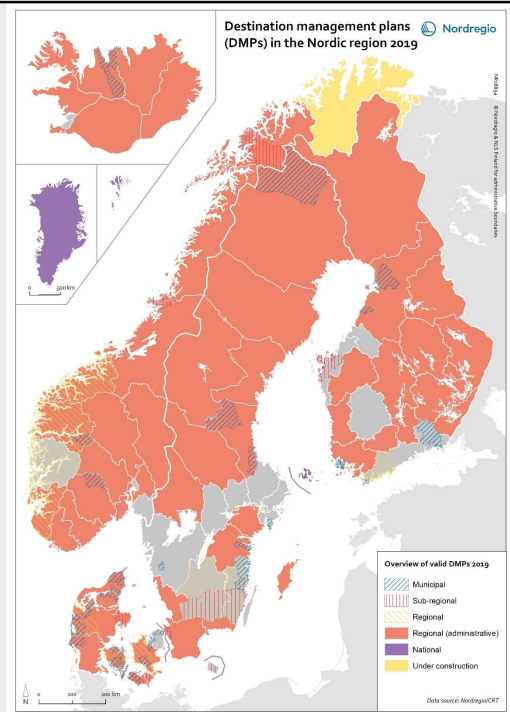
- Sustainable tourism – an oxymoron? (Hall, 2012; Saarinen, 2012; Saarinen & Varnajot, 2019)
 - Greenwashing? (Hall, 2015). Staycation?
 - Circular economy in tourism?
 - Sustainability concerns in tourism planning?
- How to ensure local benefits from rural tourism?
 - Local synergies and inter-sectorial dynamics (Korsgaard, Ferguson & Gaddefors, 2015; Gyimóthy, 2017).
 - Strategic use of tourism and hospitality-based networks for local and regional development (Robertsson & Marjavaara, 2015; Larsen, Broegaard & Larsen, 2018; Slatmö et al, forthcoming).

RESEARCH QUESTIONS

- In which ways do regional and municipal Destination Management Plans (DMPs) from rural areas take sustainability into account?
 - To what extent do local & regional actors use DMPs as a tool to balance economic development and environmental or social strain from tourism?
 - How, where and by whom is tourism development used to strengthen synergies with natural and social environments?

RESEARCH DESIGN & METHODOLOGY

- Municipal or regional Destination Management Plans (DMPs) from the Nordic region (N=119).
 - Criteria for inclusion:
 - Non-urban regions
 - DMP's in current use (dating)
- Coding DMPs (in national languages); pre-defined codes and emergent categories (Nvivo 12).
- Analysis both within nodes and between nodes and classifications (matrix queries), exploring patterns, at national level.
- Comparison within and between countries.



CLASSIFICATION OF DMP CHARACTERISTICS

Case Classifications

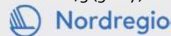
Name
Rural Tourism Strategies Norden
<ul style="list-style-type: none"> small and family owned companies in area Contribution to job creation (of tourism) relative to national average Importance of Tourism, local economy relative to national average Predominant Tourism segment in region Cruise tourism Country Border region Rural Urban Typology Administrative level of strategy Experienced negative consequence of tourism Phase in Tourism development (Life Cycle) Lifespan of strategy document Strategy process Sustainability concerns job expectations Econ growth expectation

Nodes

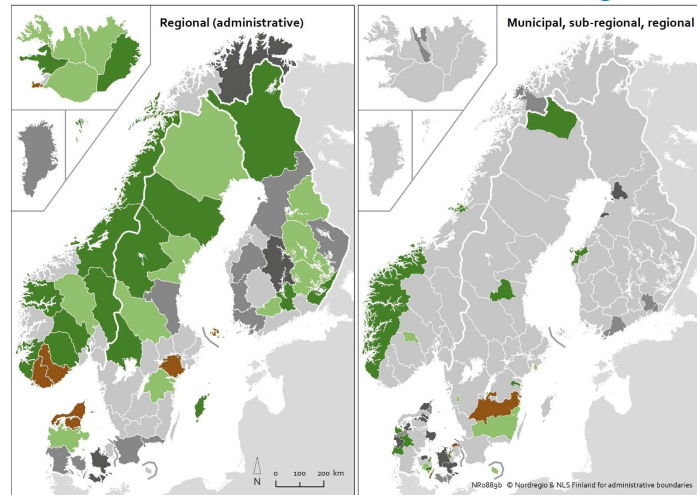
Name	Files	References
Avoid negative impacts	6	9
challenges	45	174
coordination and collaboration internally	58	315
Cruise Tourism	15	100
Education-competence	43	151
endogeneity-authenticity	40	112
Expectations growth	46	133
Expectations local jobcreation	39	72
Experienced negative effects of tourism	3	8
functional tourism territory	16	29
Gastro-tourism	39	84
In-migration-attraction of new population	23	49
Natural resource management	13	21
nature oriented tourism	39	118
Nature protection and reserves	27	50
Right to roam (allmansrätt- commons)	23	52
Seasonality & extend season	40	88
Secure added value in other sectors	38	125
Secure local benefits	48	185
Sustainability concerns	36	148
Tourist origin	35	73
User groups	10	13

SUSTAINABILITY CONCERNS

- DMPs exist that do not mention 'sustainability' (in local language) or contains elements coded as such during the content analysis; as well as DMPs that only mention the concept but lacks any operationalization.
 - DK: 2/3 of the DMPs (21 of 32)
 - N: 1/7 of DMPs
 - S: 1/5 (5 of 27)
 - IS: 1/4 (2 of 7)
- Simultaneously, DMPs exist that include environmental and social sustainability issues, in addition to the economic ones, and does so in ways that bridge out from the tourism industry.
 - N: 3/5 of the DMPs (13 of 21)
 - DK: 1/6 of the DMPs (5 of 32)
 - S: 1/2 (13 of 27)
 - IS: 1/3 (5 of 7)



Sustainability classification of DMPs 2019



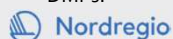
SUSTAINABILITY CONCERNS

Negative experiences of tourism are hardly reflected in the DMPs, despite debate and literature about increasing numbers of tourists pressuring the public right of access.

- Denmark, Sweden
- Norway, Iceland, Faroe Islands: Cruise and seasonal peaks.

Does having experienced negative consequences of tourism influence the sustainability concerns in DMPs?

- Tendency (Norway, Iceland, Faroe Islands), that having experienced negative consequences of tourism is associated with green and dark-green DMPs.



Denmark (N=31)	Sust. concerns	Exp. Negative conseq.	Not experienced neg.
	Black	0	12
	Grey	0	8
	Brown	0	3
	Green	0	2
	Dark Green	0	6
Norway (N=19)	Sust. concerns	Exp. Negative conseq.	Not experienced neg.
	Black	0	1
	Grey	0	2
	Brown	0	1
	Green	1	3
	Dark Green	3	8
Sweden (N=27)	Sust. concerns	Exp. Negative conseq.	Not experienced neg.
	Black	0	2
	Grey	0	3
	Brown	0	8
	Green	0	6
	Dark Green	0	8
Iceland (N=7)	Sust. concerns	Exp. Negative conseq.	Not experienced neg.
	Black	0	0
	Grey	0	1
	Brown	0	1
	Green	2	0
	Dark Green	3	0

SUSTAINABILITY CONCERNS

Participatory planning processes

- More inclusive processes tend to result in more holistic DMPs, with more local development issues being included.
 - DK; Sweden; Iceland;
 - Norway – not as marked
- Related to type of actor leading process; more than business-development-authority; allowing multiple viewpoints and experiences to be voiced
 - Community/destination development
 - Broad-based collaboration (food, outdoor...)



Denmark (N=28)	Sust. concerns	Inst. led	Consult.	Inclusive, business	Inclusive, broad
Black		7	1	1	2
Grey		1	0	1	5
Brown		0	0	1	2
Green		0	0	0	2
Dark Green		2	0	0	3
Norway, (N=21)	Sust. concerns	Inst. led	Consult.	Inclusive, business	Inclusive, broad
Black		0	0	1	0
Grey		1	0	0	1
Brown		1	0	0	0
Green		2	1	1	0
Dark Green		1	0	8	4
Sweden (N=27)	Sust. concerns	Inst. led	Consult.	Inclusive, business	Inclusive, broad
Black		4	0	0	0
Grey		4	0	0	3
Brown		0	0	0	0
Green		0	0	0	3
Dark Green		0	0	8	5
Iceland (N=7)	Sust. concerns	Inst. led	Consult.	Inclusive, business	Inclusive, broad
Black		0	0	0	0
Grey		1	1	0	0
Brown		0	0	1	0
Green		0	0	3	0
Dark Green		0	0	2	0

'Preliminary' Results

- Limited use of DMP as strategic planning tools for intra-sectorial issues – but potentials.
- Main focus on economic growth within sector (overnights; employment).
- Sustainability concerns (Soc, Env) only weakly represented – although with national and local variations.
 - Negative experiences => more holistic sustainability and nature preservation concerns
 - Norway; Faroe Islands; Iceland & Finland to some extent (Cruise tourism & seasonal peaks);
 - Participatory planning processes => more holistic sustainability concerns.



Ágúst Bogason
28. November 2019



Future in tourism - How to grow in harmony with industry and environment Is Sustainable Tourism Possible?

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Sustainability 2030

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Where are we heading?

- Cluster-to-cluster cooperation in the North Atlantic
- Input for discussions









Cluster-to-cluster cooperation in the North Atlantic food and tourism industry; the road to increased economic activity on the extreme edge and sustainable tourism.

A NORA financed network project 2017 – 2020.

Mads Randbøll Wolff, 2019

05.12.2019



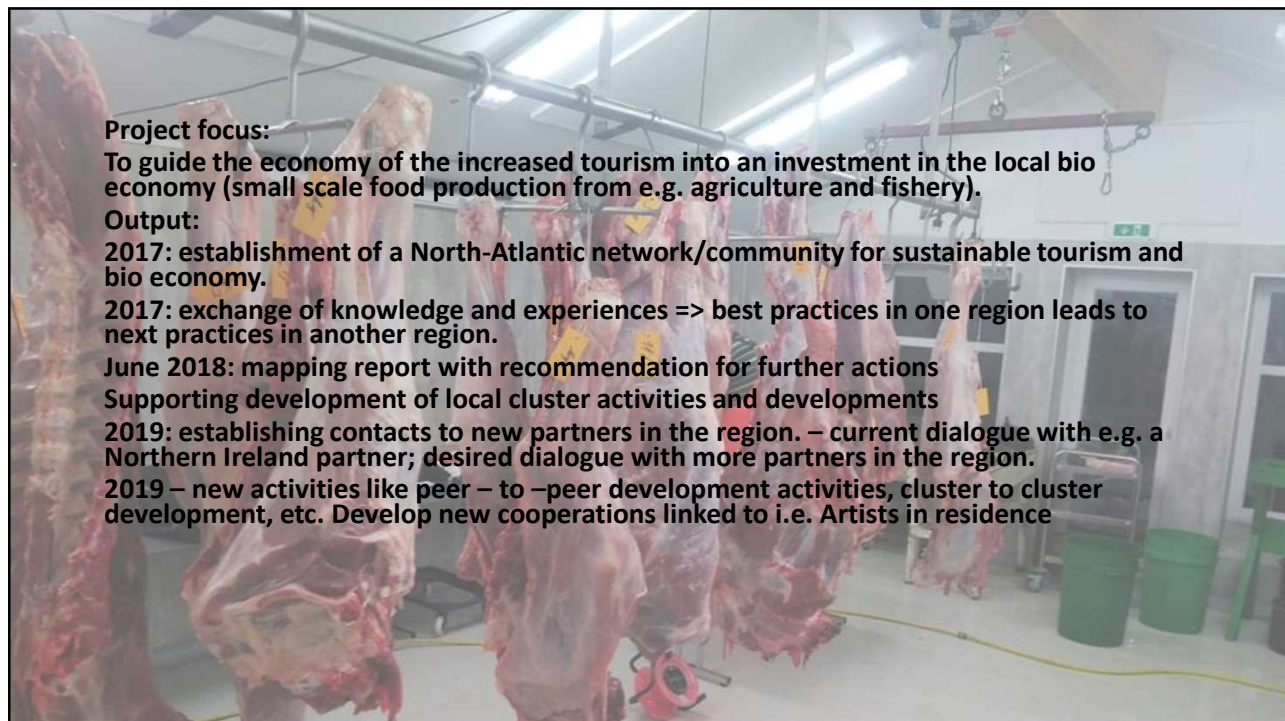
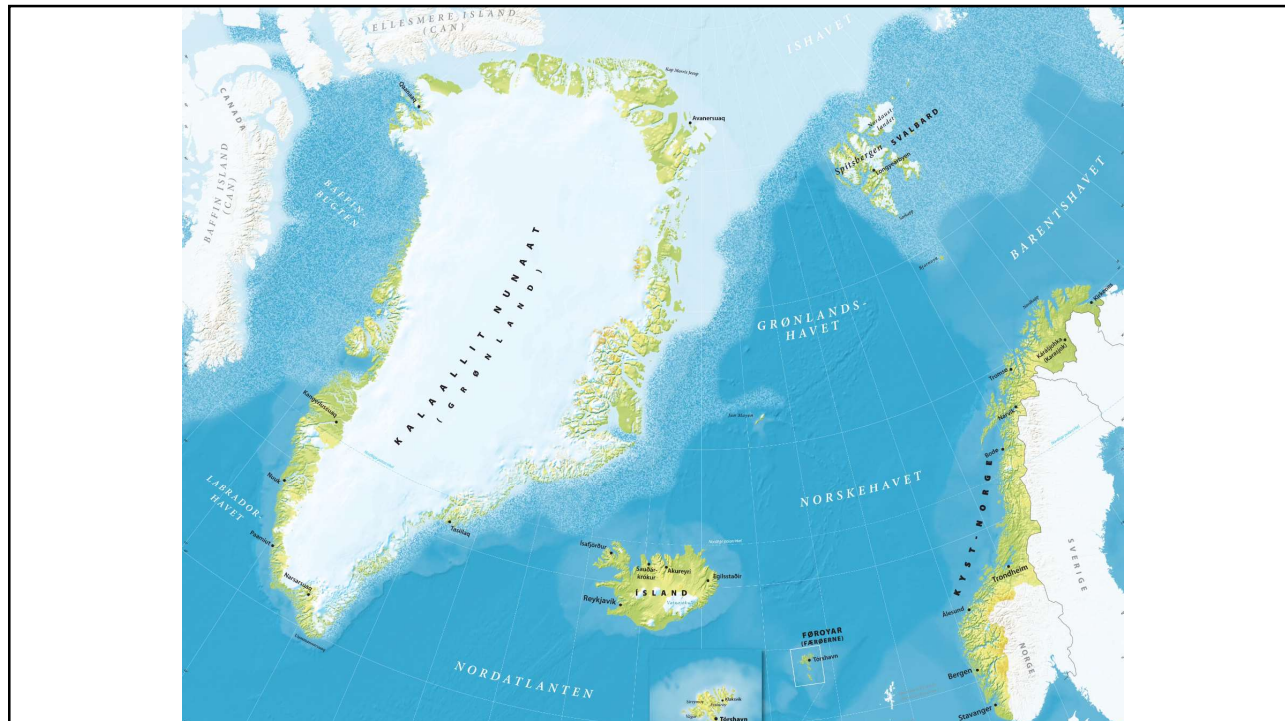


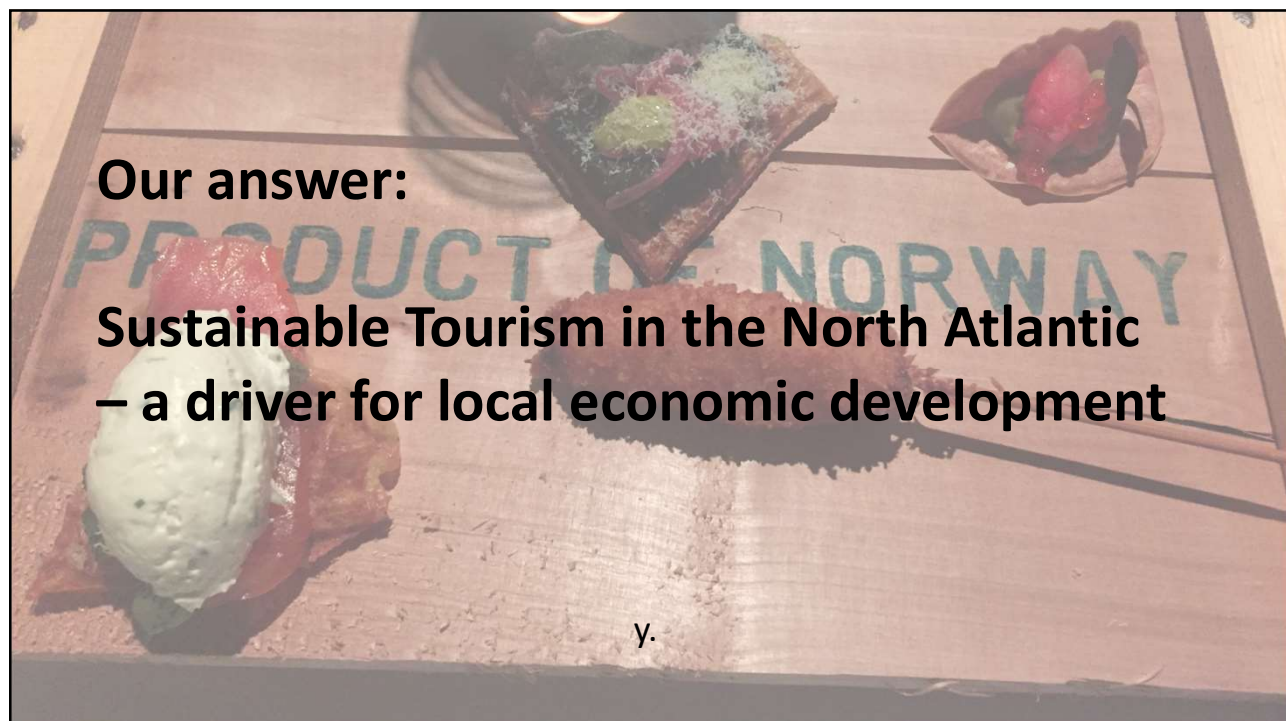



Aiming at increasing the competences and capacity to transform and direct the rapid growth in tourism into an investment in the local bio economy and local sustainable communities.

Partners:

- Búnaðarstovan – Agricultural Agency, Faroe Islands (authority)
- Innovative Opplevelser, Norway (cluster network)
- Sermersooq Business Council, Greenland (business council)
- Austurbrú, Iceland (public-private partnership for local development)





Tourism. Challenges and possibilities:

- Rapid growth in tourism in the North-Atlantic
- Successful campaigns to attract tourist
- Lacking/weak focus on destination development
- Transform the growing tourism into an investment in the local economy!




Bio economy, challenges and possibilities:

- Growing focus on small scale agriculture and food production.

But:

- Lack of financial support and investment
- Small and independent producers, weakly linked to the market
- Fragmented effort to support innovation and development
- Weak cluster development






Input for discussion

Tourism is too important to leave for the tourist industry alone!

- What can we do about it?
- Old time answers for old time questions are no longer valid? We have to do something new?
- What if tourism is not a goal as such but a means to support the development of the local community?



Input for discussion

Are we facing a system failure?

- Landuse conflicts – tourism is "eating" of the shared values without contributing
- From DMO to DMMO – from marketing to community based development!
- How to include the local communities?

