Planning for sustainable tourism in the Nordic region

Pan-Nordic analysis of Regional Tourism Strategies for rural areas

Ágúst Bogason, Anna Karlsdóttir and
Rikke Brandt Broegaard

NORDREGIO REPORT 2020:12

Contents

PDF frontpage	1
Index	2
Preface	5
1. Introduction	6
1.1 Background for this study	8
1.2 Interconnections between rural development and tourism	9
1.3 Community development and tourism	10
1.4 An explorative pan-Nordic analysis of regional tourism development plans (TPDs)	11
1.5 Research questions	12
2. Methodology	13
2.1 Data collection—identifying tourism development plans from the Nordic rural regions	13
2.2 Analytical methods	14
3. Results: The tourism development plans sampled	18
3.1 TDP sample characteristics	18
3.2 Frequency of variables in TDP coding	21
3.3 Frequency of variable use—comparison between Nordic countries	24
3.4 Summing up	29
4. Thematic analysis: Expectations of economic growth, job creation and competence development	30
4.1 Aiming for economic growth	31
4.2 Expectations for investments, local job creation and multiplying effects	32
4.3 Expectations of 'positive side effects' from growth—increased competence and attractiveness	33
4.4 Summing up	35
5. Thematic analysis: Collaboration and organisation of tourism development	37

5.1 Coordination among tourism stakeholders and with public authorities	38
5.2 Collaborative demand for, and creation of, better data	41
5.3 Coordination and collaboration on marketing and destination branding	43
5.4 Summing up	46
6. Thematic analysis: Other pressing issues and concerns in the TDPs	47
6.1 Seasonality	47
6.2 Infrastructure and investment	50
6.3 Regional development perspectives in tourism planning	51
6.4 Environmental concerns	55
6.5 Summing up	57
7. Sustainability concerns	59
7.1 A typology of sustainability concerns in TDPs	60
7.2 Do negative experiences affect sustainability concerns?	65
7.3 Association between TDP processes & treatment of sustainability concerns	67
7.4 Summary	71
8. Discussion, conclusions, and recommendations	72
References	77
Annexes	82
Annex 1: List of analysed tourism development plans (TDPs)	82
Annex 2: List of classifications used for coded material	85
Annex 3: National level analysis of frequency of code use in TDPs	86
Annex 4: Frequency of coded material—comparison within each Nordic country	91
Annex 5: National differences within 'sustainability concerns' in TDPs	99
Annex 6: Distribution of Nordic rural TDPs by sustainability concern type, and whether negative consequences from tourism are mentioned	99
Annex 7: Distribution of Nordic rural TDPs according to mentions of negative experiences and TDP process typology by type of sustainability concern	101

Annex 8: Introduction to focal chapters presenting examples of how	102
About this publication	106

Preface

This project looks at the challenges facing the development of a more sustainable rural tourism in the Nordic regions. Our key interest is understanding the degree to which regional tourism strategies are used by the tourism actors, policy makers and local communities as tools to balance positive economic and social development in rural areas with the environmental or social burden of the tourism. What are the main concerns and interests in the different tourism planning documents? What visions for tourism development do they express, and what role do sustainability concerns play in the plans envisaged? Although this study was designed in 2018, prior to the current Covid-19 crisis and its wide-ranging impact on tourism, it contains results which are relevant to the changes in tourism planning taking place across all parts of the Nordic region in the wake of the pandemic.

Building on previously acquired and assembled knowledge from the Nordic Arctic working group (2013–2016), we conducted a scoping analysis whereby we mapped all identifiable, valid regional destination management plans throughout the Nordic region. This was supplemented with regional planning documents that addressed tourism development explicitly for those areas (where destination management plans were not identified in the search) and typologised them. This report therefore represents the first ever pan-Nordic study and analysis of regional destination management plans and the ideas contained within them.

The challenges of rural tourism include capacity constraints on capital and labour, the arrangement of natural and physical capital, and strong seasonal differentiations—all of which require consideration in order to achieve optimal investment. The project looks more closely at how these challenges are met in various rural areas within the Nordic region. We explore visions and goals for tourism development through an analysis of rural areas' regional tourism strategies across all the Nordic countries, as formulated by a variety of actors at municipal, sub-regional and regional levels. We organise our analysis of the sub-national tourism development plans into four thematic analyses, concerning, respectively: 1) economic growth, job creation and competence development; 2) collaboration and organisation; 3) other main issues and concerns (including seasonality, infrastructure and investments, regional development perspectives in tourism, and environmental concerns), and 4) sustainability concerns.

Through the presentation of focal chapters concerning different tourism planning approaches, and foci from each of the Nordic countries, we provide an account of the dynamics of local tourism challenges and innovation. This is used to provide examples of how stakeholders, including the local community, benefit from tourism development and how (and the degree to which) existing strains in relation to the development of tourism are addressed in the various destination management plans. Cruise tourism and issues regarding the right to roam in a Nordic context are also addressed in two short focal chapters. The examples are available in separate report while a short summary of each is included at the end of this report.

The 'Rural tourism in the Nordic region' project is a part of the Nordic Thematic Group for Sustainable Rural Development.

1. Introduction

The tourism sector spans the extreme ends of both the local and the global. Tourism permeates economic, social, cultural and environmental conditions at all levels. The interaction of the global impact of tourism, and the extent of its infiltration into the local context, makes the sector an important subject for developing relevant and modern public policy approaches. At the same time, tourism and tourism development entail both opportunities and challenges.

Nature has been a key factor for attracting tourists in the Nordic countries for decades. As a reaction to urban expansion and loss of open space, the attractiveness of local landscapes has continued to gain importance in location decisions and in influencing political agendas (Waltert & Schlöpfer, 2010). The demand for nature-based tourism has grown steadily, and is the most rapidly expanding sector within tourism across Europe and elsewhere at present (Bell *et al.*, 2008, Sæþórsdóttir, 2018, World Bank, 2018). This demand has created opportunities for nature-based tourism to develop as an economic diversification tool within regions rich in natural amenities – such as northern Europe and the Nordic countries. In Finnish Lapland tourism became the most important economic sector a decade ago, providing more job opportunities than the forestry industry (Council of Lapland, 2008). Nature-based tourism is also a growing land-use activity, and an economic sector involving different types of entrepreneurs. Many of these are relatively small, located in rural regions, and they may only work part time in tourism, combining it with agriculture, forestry or other rural means for earning a livelihood. Many of these businesses are also challenged by the seasonality of tourism demand, and conflicts with other natural resource uses (Fredman & Tyrväinen, 2010). Environmental and landscape qualities, including cultural landscapes, amenities and social experiences, are often the main selling-points for rural tourism. Many areas are also attractive as a result of their unique cultural heritage, activities and events – for example, gastro-tourism. As annual tourism numbers have skyrocketed in certain destinations, the pressure of tourism on the natural environment and infrastructure has increased in parallel, as have CO₂ emissions from related intercontinental travel. That was the case until Covid-19 hit, in early 2020. The pandemic has given the whole industry, and stakeholders involved at multiple levels, occasion to rethink the premises upon which recent development has been built.

The demographic trend in rural areas all over Europe has, if anything, accelerated even more over the past decade. The megatrend involved in this is that younger people are moving to more urban areas, while the rural population is declining and ageing (Karlsdóttir *et al.*, 2020, Sanchez & Heleniak, 2019). At the same time economic restructuring has been taking place, with public sector cutbacks in certain areas and declining primary sector employment. Since these 'traditional' industries are shrinking and continuously demanding less labour, they are creating fewer jobs than before. At the same time, other emergent sectors – like the creative industries, recreational services and other types of jobs in the tourism sector—have become relatively more important. More remote natural landscapes have also become investment opportunities for recreational purposes and as amenity landscapes (Waltert & Schlöpfer, 2010; Abrams *et al.*, 2012, Frisvoll, 2012).

The economic and demographic changes in rural areas and smaller communities across the Nordic countries have therefore caused tourism development to be seen as an increasingly important source of employment and economic growth in remote places. Furthermore, in many regions, tourism has also been expected to serve as an engine for skills development and for place development (re-invention and branding).

Tourism development in Nordic rural regions is, however, quite unevenly distributed. While many places have experienced a rapid growth in the arrival of tourists, others are struggling to attract visitors and to build up viable businesses. The general characteristics of remote Northern areas also further exacerbate the challenges faced by sustainable tourism development. Such challenges include high seasonality, small population bases (and therefore a limited pool of labour), as well as a fragile natural and cultural environment. Tourism growth is generally concentrated in destinations that are or have become well connected to the international system of mobility on which tourism relies. This is a blessing that may well turn into a curse if not managed in responsible ways.

The tourism sector differs in many ways from other more traditional industries, not least in the way it cuts across many different sectors. This includes transportation (aviation, shipping, bus transport, ferries, etc.), the hospitality industry (hotels, restaurants, etc.), food production (agriculture, the fisheries industry, food producers) and cultural sectors (museums, music, film, etc.). Moreover, these sectors fall under the responsibility of several different ministries and regional government actors, and even local authorities in some cases. This makes it difficult for any public actor, be it national or regional, to have full control, oversight or responsibility for the tourism sector as a whole (Árnadóttir, 2019).

Since tourism is such a complex sector, and one that represents several industries, it can be challenging to identify and align common goals and interests. Any policy on tourism, and any framework for collaboration within the industry, must therefore be able to deal with both its complexity and with the many converging interests it and the Nordic countries represent. (Nordic Council of Ministers, 2019). All the Nordic countries emphasise, to varying degrees, some sort of 'whole of government' or cross-sectoral structure which aims to be best in facilitating cooperation, and in streamlining the framework related to the tourism sector in each country. Cooperation and consultation between all of these actors is therefore regarded as vital, and the development of tourism planning in all Nordic countries has been towards establishing such coordinating structures, formally or informally (Árnadóttir, 2019).

In the recent decade, the focus on destination management has become more prominent (Øian, *et al.*, 2018) in addressing major current trends and instruments for sustainable tourism development. In 2018 a closer Nordic cooperation on tourism became a priority in the Nordic countries. However, it has so far restricted itself to addressing the conditions for policy involvement rather than analysing what policy instruments are needed to deal with current challenges (*ibid*; Árnadóttir, 2019). The community dimension of tourism development – how varying communities are exposed to tourism, whether they benefit or suffer from the increased number of visits – has also to be taken into account if tourism development and regional development are to create the right synergies.

Strokkur, an active geyser and a major attraction in the 'Golden Circle' are in south Iceland.

Photo: Ágúst Bogason

1.1 Background for this study

Tourism has, especially over the last decade, grown globally, and has thereby also made a substantial contribution to job creation and economic activity locally. The demand for new and different kinds of experiences, where unspoiled, authentic and nature-based experiences are in the foreground, has made the Nordic countries ever more popular destinations. The growing economic importance of tourism is also reflected in the increased political importance of the sector.

This political significance, as well as increased interest in tourism, has been confirmed, for example, by the Nordic Council of Ministers, which has made tourism cooperation one of its priorities, emphasising the increasing will to learn from neighbouring Nordic countries' tourism development (Árnadóttir, 2019). In 2017, Nordic business ministers decided that a Nordic plan for cooperation on tourism should be developed, and a working group related to this was duly set up. The 'Plan for Nordic Tourism Co-operation 2019–2023', published in 2019, highlights the priorities for cooperation on four strategic themes. These have been labelled: Competitive Nordics, Innovative and smart Nordics, Sustainable Nordics, and Attractive Nordics (Nordic Council of Ministers 2019).

The Nordic countries are also emphasising the need to ensure sustainable development of the tourism industry, not only with regard to environmental sustainability, but also in terms of its social and economic aspects. Tackling the many different facets of sustainability in tourism, and achieving real results, is a challenging task with all sorts of connecting points to other sectors, interests, and forms of governance. Sustainability implies a long-term perspective, while at the same time presenting a requirement for immediate action to realise urgent goals. Sustainability is a global and a local challenge. It must therefore be addressed through a variety of channels (Árnadóttir, 2019). In the light of quantitative growth, patterns of development and new trends within the tourism sector, the Nordic countries have also recognised great potential in further utilising tourism for regional development, providing jobs and secure regional economic revenue – 'secure' at least until the Covid-19 crisis, prior to which tourism was often presented as an area which was seemingly resilient to economic downturns in other sectors (Müller and Ullrich, 2007). The individual governments of the Nordic countries, as well as many of its regions, have also prioritised tourism development through 'place re-invention' (Viken & Nyseth, 2009) and have marketed themselves as travel destinations. Considerable amounts of public funding have been devoted to this cause, which is justified as being part of the necessary regional development required by declining areas.

Public policy and regional development plans in the Nordic countries demonstrate that increasing economic activities is viewed as a priority, while good examples illustrate how increased tourism can be instrumental in bringing about economic sustainability for some regions. Some recent examples show how several Nordic regions and municipalities, after years of economic and demographic decline, have been able to turn their demographic and economic indicators from negative to positive, in part due to an increase in tourism (Kull *et al.*, 2020). The tourism sector therefore has great potential for creating economic growth and development. However, at the same time, tourism can also pose real challenges to communities, to particular cultures, and to the environment, since it can have a huge and disruptive impact on local communities and economies. There is a strong awareness in all the Nordic countries of the different forces at play when it comes to tourism, and as well as the complex interplay—and often conflicting interests—within tourism development (Nordic Council of Ministers, 2019).

The economic and cross-sectoral impact of tourism, and the call for growth within the sector, makes the importance of working towards sustainability even more critical. Tourism is among the fastest changing industries in the world. Markets and expectations shift, degrees of popularity and trends alter quickly, based on different factors that cannot be controlled by conventional marketing, policy or governance. Social media, particular influencers, and different forms of media can all help put a particular place on the map in the blink of an eye, while at the same time political unrest, natural disasters or a pandemic outbreak can lead to tourist hotspots becoming deserted overnight. The industry is naturally volatile and seasonal. Rapid changes in both the industry and its markets make it a constant challenge to keep up with such fast-changing demands and situations.

Many of these issues and concerns can be brought together under the heading of destination management planning, which may be described as a methodology for strategic planning in tourism which draws on the strengths and resources of particular destinations, while also

dealing with possible weaknesses and threats. The process of developing a Destination Management Plan (DMP) can be a participatory exercise that involves a wide range of local actors and engages them in producing shared objectives and parameters for the local tourism development. Destination Management Planning processes are also viewed as suitable platforms for collectively discussing and addressing challenges (and possible differences) which can arise in relation to tourism (Syssner & Hjerpe, 2017). DMPs are often presented as tools to tackle problems and conflicts caused by tourism and can be platforms for settling differences of opinion. Yet their development may also be outsourced to consulting companies, or they may be largely written by civil servants. Considering that tourism is a complex industry, and that sustainability is a complex concept, there are no easy solutions to the dilemmas that may arise. However, for any credible policy or framework for collaboration on tourism to be able to deal with the complexity of the sector and the many converging interests it represents, it is recognised as necessary that all relevant voices are represented at the table (Árnadóttir, 2019).

1.2 Interconnections between rural development and tourism

The growth of tourism raises great expectations for its positive functioning as means for local renewal and economic prosperity across the Nordic countries and the Arctic. Such tourism-driven growth goals may be especially pronounced in rural areas, especially for sparsely populated communities where structural change has meant a decline in traditional job-creating rural sectors like farming, forestry, and fishing. However, in the light of global climate change, and sustainability challenges such as growing social and economic inequality between rural and urban areas (Frisvoll, 2018; Jensen *et al.*, 2019), it is relevant to examine the way in which regional tourism plans in rural areas envision and provide for tourism management. Also, how they try to enhance the positive outcomes of tourism while mitigating possible negative outcomes. This includes tourism's economic contribution and its social effects, as well as taking into account the protection and regeneration of natural resources, and the long-term viability of specific tourism activities.

As has been stressed by several previous studies, tourism development is seen as an increasingly important source of employment in rural areas (Müller & Jansson, 2007; Øian *et al.*, 2018). In its recovered form, post-pandemic, it will most likely continue as such, depending on recovery measures (including considerations on lifting travel restrictions), the restoring of traveller confidence, and rethinking the whole tourism sector for the future (OECD, 2020). Much tourism research in rural remote areas of the Nordic region and the Arctic has focused on nature-based tourism and rural tourism (e.g. Hall & Saarinen, 2008; Grenier & Müller, 2011; Lemelin *et al.*, 2013; Müller *et al.*, 2014; Viken & Granås [eds.], 2014; Lee *et al.*, 2017; Fredman & Tyrväinen, 2010). With more flexible and easier movements of labour and capital across national borders, tourism is now reaching more rural communities which, a few years ago, had next to no tourist activity. This process seems to have a great effect in the remote and less populated areas of the Nordic countries. It is a consequence of mitigating previous infrastructural disadvantages (Bramwell *et al.*, 2017; Miller & Twining-Ward, 2005) through large-scale infrastructure development in particular rural areas (for example airports in Greenland), or by getting ready to receive large numbers of cruise tourists.

Summerhouses in rural Denmark.

Photo: Ágúst Bogason

1.3 Community development and tourism

In recent years we have seen an increasing number of tourism destinations seemingly exceeding what might be called the 'social tolerance' of the local population. There are destinations that have to manage the number of tourists due to the limits of their social and environmental 'carrying capacity' also within in the Nordic region (see, for example, Helgadóttir *et al.*, 2019; also Hall, 2019; Ólafsdóttir *et al.*, 2018). Being the clearest example is Iceland that by 2019 had reached thirteenth on the list of countries with the highest ratio number of tourists per inhabitant in the world (Sæþórsdóttir *et al.*, 2020). Yet for most rural areas in the Nordic region, tourism is looked upon as a potential driver of much-needed economic development and job creation, ideally coupled with the development of capacity and attracting new residents or part-time visitors (Hjalager *et al.*, 2018; Slätmo *et al.*, 2019).

Sustainability has become an important policy framework tool for the tourism industry, especially in relation to finding a suitable balance between economic, sociocultural and environmental aspects in long-term development perspective (Saarinen, 2015). However, the question of whether sustainable tourism is an oxymoron has also been raised (Saarinen & Varnajot, 2019). Saarinen (2019) illustrates the way in which how tourism increasingly depends upon air travel, for example, and Hall (2019) points to what he sees as a growing contradiction between "managerial tourism positions" and sustainability (Hall, 2019). Gren & Huijbens (2014) go a step further, arguing that tourism is unsustainable to the extent that it should be viewed as having "contributed to the reshaping of the Earth for human purposes, and to climate change."

Many of the future perspectives in determining the grounds for sustainable tourism will include more focus on longer stays (as opposed to shorter, long-haul travel) and an emphasis on staycationing. Challenges and possibilities in the future will also be shaped by external forces of change, such as climate change, political disturbance, and over-tourism (Butler, 2018). The events of early 2020 show all-too-clearly the enormous effects which unforeseen external factors can have on travel and tourism development, as the Covid-19 pandemic did by putting a total stop to travel, resulting in an almost complete shutdown of the tourism and hospitality sector. The pandemic also highlighted the necessity of planning for resilient destinations and communities (Amore *et al.*, 2018; Pechlaner & Innerhofer, 2018).

An increasing number of amenity consumers have started to focus on so-called 'ethical consumption', through ethical and responsible tourism. This may include the purchase of fair trade, local and organic products, and 'slow food'. These are all significant for the hospitality sector, as well as low carbon travel 'staycations' and local tourism, as opposed to more global travel (Hall, 2010). Hall argues that this dynamic, in connection to the broader politics of consumption, provides the basis for an even more radical critique of conventional thinking in tourism, notably with respect to the role of economic growth (Hall, 2019). This view calls for a notion of tourism in local and regional rural development as an activity that supports local communities and prevents the economic leakage often associated with economies of scale and consolidation, and with the vertically integrated tourism industry.

'Circular economy' perspectives on tourism also call for a change in paradigm regarding the role that it might play from a regional perspective. This is inevitably going to require more attention in the coming years – making it likely that that such perspective will become more immediate in those future tourism visions linked to regional development (Vargas-Sánchez, 2018; Manniche *et al.*, 2019).

Tourism has both inter-sectoral dynamics and local synergies which are also important to comprehend, and which are interrelated with rural development considerations. Evidence from rural areas in the Nordic region shows that entrepreneur activities are strongly influenced by the context in which they occur. For example, in tourism and the experience economy, it is important to understand how local entrepreneurs create opportunities borne out of specific local conditions (Tanvig, 2012). Rural entrepreneurs mix intimate knowledge of, and concern for, place with inputs and resources from non-local networks, and thereby obtain 'the best of both (local and non-local) worlds' (Korsgaard, Fergusson & Gaddefors, 2015).

The creativity involved in diversification led by tourism development in many rural regions involves re-inventing place and destination, often benefitting other related sectors – for instance food producers in the local area. Gastro-tourism is gaining much ground in rural tourism, and both food advocates and the cuisine sector have become interested in invoking 'Nordicness' in its many forms, related to aesthetics and different ideas of morality. Branding thereby becomes a dynamic, ongoing interpretation of symbolic markets which might 'transgress' the traditional boundaries between urban/rural, local/global, tradition/trendy and authentic/invented (Gyimóthy, 2017). Understanding the link between tourism in the rural and broader regional implications is therefore important.

Local/extra-local synergies and inter-sectoral dynamics can also be viewed through the lens of knowledge transfer. Robertsson & Marjavaara (2015), argue that there is a geographically displaced 'buzz' in many popular tourism destinations during the tourism season, due to the overall attractiveness of the place facilitating meetings between people who would otherwise not normally come into contact – for example, those from finance or branding, and local crafts-persons or food-entrepreneurs. Such 'displaced seasonal meetings' can potentially boost the innovative capability of single firms and destinations where it occurs. Encounters between place-engaged guests and locals may therefore spur innovation for the benefit of the community visited. It is also important to bear in mind that so-called 'translocal actors', who do not live permanently in the area, but who feel place attachment and engage themselves in the area, can play an important role in both community and place development which is related to tourism (Broegaard, Larsen & Larsen, 2018; Granovetter, 1973). Tourism in smaller villages and rural areas creates urban-rural flows of people, including those with similar needs and desires to permanent residents. However, they may only stay for limited periods, thereby stretching the demand for public and private services (Slätmo *et al.*, 2019).

1.4 An explorative pan-Nordic analysis of regional Tourism Development Plans (TPDs)

A pan-Nordic analysis of regional tourism will provide an interesting source for other researchers. While we started searching for Destination Management Plans (DMPs) for all of the non-urban regions of the Nordic countries, we soon realised that we had to complement this by looking for a wider range of types of document dealing with tourism development planning in rural areas, precisely in order to cover what would otherwise have been "grey areas" on the map. In this report, however, we use the common term Tourism Development Plan (TDP) for all of the plans

and strategies and reports identified and analysed. The mapping of the contents of TDPs is especially interesting, since these are the documents available—with a few exceptions—at a pan-Nordic level, but which are formulated at the lowest geographical level; i.e. by tourism-related actors at municipal, sub-regional and/or regional level. This makes TDPs an interesting source for analysing how sustainability concerns are—or are not—integrated into tourism plans.

To map these plans by coding and categorisation also reveals how the various regional tourism actors in the different Nordic rural regions define themselves in relation to tourism, what their strengths and focuses are, where they see opportunities, and what they consider their main challenges. By this, we can identify common opportunities and challenges as presented in the TDPs of the different Nordic regions.

1.5 Research questions

This report addresses the following research questions:

- What issues, visions and concerns are expressed in the regional and municipal tourism development plans (TDPs) from the different Nordic rural regions?
- In what ways do regional and municipal TDPs from rural areas take sustainability into account? Does the material indicate any patterns and reasons for this?

The remainder of the report is organized as follows: Chapter 2 presents the methodology used, while chapter 3 presents a descriptive analysis of a sample of rural tourism development plans from the Nordic region. Four thematic analytical chapters then follow. Chapter 4 looks at economic growth, job creation and competence development (and expectations thereof) as expressed in the TDPs analysed. Chapter 5 analyses the collaborative and organisational aspects of the TDPs. Chapter 6 presents the other main issues and concerns in these TDPs—namely, seasonality, infrastructure and investment, regional development perspectives in tourism, and environmental concerns. Finally, chapter 7 analyses the treatment of sustainability concerns in the TDPs. The report ends with discussion and conclusions in Chapter 8. As a postscript, short introductions are given to ten focal examples from around the Nordic region.

2. Methodology

This chapter presents the methodology used in data collection and analysis of the tourism development plans from Nordic rural regions.

2.1 Data collection—identifying tourism management plans from the Nordic rural regions

A web search was carried out to identify and retrieve all available destination management plans (DMPs) from Nordic rural regions. Search terms included [destination management plan, tourism policy, tourism strategy, tourism plan, local, regional, etc.], and the search was carried out both in English and in the primary language for each country.

The geographical coverage of the DMPs identified was shown by indicating them on a map of the Nordic region. However, this process made it obvious that there were several areas for which DMPs could not be identified through a web search with the characteristics identified above. For these areas, additional searches were carried out, adding the name of the missing regions or municipalities to the search, as well as the visiting authorities or stakeholders' websites in pursuit of relevant documents. In some cases, the web search was followed up by some correspondence with officials in the relevant administrative or geographical area – whether regarding the search results, or regarding a lack of identified DMPs. Relevant tourism organisation websites were also visited, and through this procedure sub-national plans and documents were included where they explicitly addressed tourism planning, even though they were not DMPs per se, e.g. a regional economic development plans with a section devoted to tourism development drawn up by a regional growth forum. Such documents were also added to the map, and they helped to increase the geographical coverage of identified plans. A total of 118 sub-national plans or strategies for tourism development in rural areas were identified. These web searches were carried out during the months of August–October 2018 and additional searches were carried out in February–March 2019.¹

After having identified and retrieved relevant reports or plans, all of them were listed and evaluated against three inclusion criteria:

- That the report covers geographical areas that are categorised as type II-V in Nordregio's urban-rural gradient typology.² This typology forms the basis for how 'rural tourism' is operationalised in this study, i.e. it is defined as tourism outside the larger cities in the Nordic countries.
- That the report is valid, i.e. not expired at the time of the sampling process,³ or the most recent one (if only very recently expired).
- That the report is addressing a sub-national area, i.e. municipalities, regions, 'landscapes' or tourism destinations (depending on issuing actor). However, for the Faroe Islands, Greenland and Åland, this criterion had to be varied, as only national level plans existed.

The overall number of reports retrieved was 118, as mentioned above, but eight of those were excluded in the end. Most of these eight reports were not included because they had expired. One did not fall under the aforementioned definition of rural tourism plans, but focused entirely on marketing among tourism actors within a destination.

The resulting empirical material consists of 110 reports on tourism development planning at sub-

1. Additional searches were done in the case of Finland, and reports had to be supplemented at later stages when a Finnish speaking researcher could not be secured to work on the project until early 2019. Johanne Jokinen contributed with coding, translation, and map-creation.

2. Whereas type I covers "predominantly urban" areas, type II covers so-called intermediate regions close to a city; III covers remote intermediate regions; IV are predominantly rural regions, close to a city; while V are those predominantly rural regions that are characterised as being remote. In some cases, the reports examined covered areas corresponding to two types within the urban-rural gradient. For these, the largest area determined the coding. For example, two reports for Vestlandet in Norway covered areas classified as II and as V in the urban-rural gradient, and were coded as V.

3. A few exceptions were included. For example, Kerteminde municipal tourism plan, in Denmark, was 'valid' only for 2015, but was included anyway because more recent TDPs were not found. Exceptions like this were made to ensure that as many rural areas were included as possible, thus avoiding "white spots" on the rural map of TDPs, which can be found in Annex 1

national level for rural areas within the Nordic region. Most of these plans were addressing broad aspects of tourism within the geographic area covered, while some had a thematic focus (such as gastro-tourism or cruise tourism) for a specific area. Such thematic plans were also included in the sample. In this report, all the reports analysed are called tourism development plans, or TDPs for short, to indicate their different institutional and procedural origin. Please refer to Annex 1 for a complete list of the reports analysed.

Country	Number of tourism development plans included in this study
Denmark	30
Finland	21
Iceland	7
Norway	22
Sweden	26
Åland	1
Faroe Islands	1
Greenland	2
Total	110

Table 2.1: The number of TDPs in each country.

The choice to include plans specifically addressing tourism development at the sub-national level, even if these plans were drawn up by actors other than destination management organisations (DMOs), results in a relatively broad range of sub-national actors as authors of the analysed plans. They include: DMOs, municipal governments (as well as consortia of multiple neighbouring municipal governments); regional development authorities; regional business development entities; growth forums, and in some instances platforms specifically created to develop a DMP or tourism strategy. In other instances, the process included consultants commissioned by a local government agency to draw up a plan or a write report.

Summing up, it was surprisingly challenging to identify and retrieve valid TDPs covering all rural areas in the Nordic countries. The resulting sample is therefore broader in scope than what may usually be considered as a DMP, especially because a wide range of different actors, and varying administrative levels, can be identified as authors of the plans and reports analysed. Also, the reports we collected demonstrate wide variety regarding the type of processes that led to them being written; especially regarding the level of public or broad/cross-sectorial participation involved in the planning process. This is important to remember when considering the results, particularly regarding content and concerns expressed in the plans analysed.

2.2 Analytical methods

2.2.1 Content coding—predefined and emergent codes

The tourism development plans were each carefully read and coded for content dealing with planning matters, as well as some factual and procedural elements. Several content-coded variables arose directly from the assignment; i.e. elements that from the formulation of the assignment were identified as being of interest for the analysis. These content-variables were thus pre-defined, following research questions and sub-questions. Other variables, however, arose as being potentially important during a careful reading and coding process (an initial analytical step). These variables were discussed by team members in the initial phase of coding and analysis. When deemed sufficiently relevant; these elements were created as new content-

coded variables. As such, they can be regarded as emergent categories that became apparent as relevant during the coding process. These emergent categories can also be called "open" or "intuitive" codes (Bernard, 2002). Whenever a new (emergent) variable was agreed upon, the already-coded material had to be re-screened for parts that needed to be coded using this (new) variable. Some re-coding of the data was therefore required, adding further variables that resulted from ongoing pre-analysis during the coding process. Likewise, relevant attributes were coded in classification sheets.

All content-coded variables and classification attributes were defined in writing (in English) by team members. As the sub-national tourism development reports are written in their relevant national language, this required a multi-lingual team to carry out the reading and coding of the material. All in all, four researchers participated in the coding process for the eight different countries and autonomous regions.

Ensuring harmonious coding between individual documents when assessing qualitative data is a challenging task, since individual persons who make the coding may well interpret things slightly differently. Since coding for the research was carried out by a multi-person team, several steps were taken to ensure that the coding was as homogenous as possible, including initial coding in pairs and the use of written definitions of variables and attributes (shared between team members).

The coding was completed using the analytical software programme known as 'Nvivo' (version 12). Nvivo allows for easy zooming in and out from coded text passages to surrounding context, enabling de-contextualisation and re-contextualisation. In addition, during the coding of the material, facilities such as automated word search, and word frequencies per document, were used for the validation of coding, as well as when reflecting on the coded material. Memos were used for (shared) reflections on text, patterns and connections, with some condensing being employed when memos were elaborated.

Analyses of the data were then done both within variables and between variables and classifications (see more in the two following sub-sections). Coded content under each variable was analysed for both content and patterns, and the Nvivo facility of easy de-contextualisation and re-contextualisation was used for exploring the context of coded passages, as well as for reviewing coded passages in combination.

Additional analyses were also conducted for selected variables and analytical themes through the use of matrix queries. Matrix queries make it possible to identify patterns within subsets of the coded material, for example by splitting the material coded under specific variables by its simultaneously assigned attributes. This analysis allows for exploring patterns within material, within a national context—for example, whether difference in the frequency and content of passages of text mentioning sustainability issues is related to the urban-rural gradient class, or to reporting on (any) cruise tourism.

2.2.2 Coded variables

As mentioned earlier, some variables were chosen based on pre-existing research on a subject that highlighted common challenges in recent material on Nordic and rural tourism, including publications on tourism by the Nordic Council of Ministers, along with the formulation of the research assignment by Nordregio's Thematic Group on Sustainable Rural Development (see chapter 1). As such, these 'pre-defined' variables were, decided upon, as issues to be investigated, independently from the content of the TDPs. The pre-defined variables are marked in green in Box 2.1⁴, which shows—in alphabetical order—all the variables which the research material was coded for.

During the initial coding process, and the overview of material being included in the research, other themes recurred in many of the TDPs. Based on those recurring themes, other variables were added to the coding process. The emerging variables are marked in blue in Box 2.1. The coding work resulted in a total of 22 main variables. Some variables were assigned sub-categories for the purposes of more detailed coding.

4. Definition of functional tourism territory: all mentioning of trans-area tourism collaboration, for example the "visit-organisations", as well as the constructed, conceptual 'functional territories', such as islands working together or collective marketing. Also, infrastructure such as airports that link tourism destinations across national borders, such as Sölen-Trysil.

During the coding process, relevant texts from the TDPs were assigned to the relevant variables. Performing the coding this way, and using the Nvivo 12 programme, qualitative data can easily be compared, both as coded text passages and as counts of the number of uses of variables for the different categories. Coding density, which is calculated based on all variables that code the content, can then be used to identify the variables that code the related content. This is useful in looking for indications of coding density—whether there is minimal or maximal coding. At the same time, the coded material is only ever one computer click away from the coded content and its qualitative context. Importantly, the tool also allows for splitting the coded material into sub-segments and comparing and contrasting these, thereby exploring patterns in the data.

BOX 2.1: VARIABLES

- Avoid negative impacts
- Challenges
- Coordination and collaboration internally
- Cruise Tourism
- Education-competence
- Endogeneity-authenticity
- Expectations growth (*with subcategory for those who had experienced growth*)
- Expectations local job creation (*with subcategory for those who had experienced job creation*)
- Experienced negative effects of tourism (*with subcategory for natural carrying capacity and social tolerance*)
- Functional tourism territory
- Gastro-tourism
- In-migration-attraction of new population
- Natural resource management (*with subcategories for biodiversity, field, forest, mountain and water management*)
- Nature oriented tourism
- Nature protection and reserves
- Right to roam (*allmansrätt/ commons*)
- Seasonality & extend season
- Secure added value in other sectors
- Secure local benefits
- Sustainability concerns
- tourist origin
- User groups (*with subcategory for different user groups; business and conventions, epicures, families with children, outdoor & adventure seekers, summer house users and WHOPS*)

2.2.3 Classifications

Relevant attributes were coded in classification sheets, where what was coded was a report's belonging to one of multiple categories. Such classification could, for example, include the duration of the report's validity (i.e. short term (0–4 years), medium term (5–9 years) and long-term (9+ years)), or whether or not it included border regions (including sea-borders), nationality, or the administrative level for which the document was valid; or whether or not cruise tourism was mentioned in the document. These attributes were recorded both in order to describe the reports sampled and to create an overview, but also to facilitate further analysis along the lines of these attributes. A detailed list of classifications may be found in Annex 2.

The team also wanted to include attributes that were less tangible. However, several of these

turned out to be difficult to work with. For example, attempts were made to assign each report to a 'phase in tourism development' (a pre-defined attribute, defined as 'emerging', 'in development', 'peaking' and 'post-peak' phases). But due to different development trajectories and initiatives within different sub-segments of local tourism, this proved difficult in practice. An example of an emerging attribute was the size of tourism companies which characterise operations in the area. But information on this was only present in a small proportion of the reports analysed, making this attribute too incomplete to justify its further use. Likewise, we attempted to assess, by available data, the importance of tourism in the local economy relative to the national average, but gaps in available data prevented us from doing a comprehensive comparative analysis. This highlights why other methods are needed to achieve a better overview of variations within the Nordic region.

3. Results: The tourism development plans sampled

This chapter presents the results of the descriptive analysis of the tourism development plans from the Nordic rural regions, mainly in quantitative terms.

3.1 TDP sample characteristics

The TDPs from the rural regions of Nordic countries gathered for this research vary greatly in detail and length, and also in geographical coverage and institutional authors. The table below (3.1) summarises the geographical or administrative level covered by the reports sampled, by country. The regional level TDPs are the most predominant, with 58 TDPs, followed by TDPs at municipal level (36 TDPs). Additionally, 12 of the TDPs are at an intermediate level, here called "sub-regional"; including, for example, TDPs elaborated collaboratively between a few neighbouring municipalities, but not including the entire region. Finally, the sample includes four TDPs at national level, from the autonomous regions of Åland, the Faroe Islands, and Greenland.

Administrative coverage of TDPs analysed	Denmark	Finland	Norway	Iceland	Sweden	Faroe Islands	Greenland	Åland	Sum
Municipal	18	6	2	1	9	0	0	0	36
Sub-regional	6	1	2	0	3	0	0	0	12
Regional	6	14	18	6	14	0	0	0	58
National	0	0	0	0	0	1	2	1	4
Sum	30	21	22	7	26	1	2	1	110

Table 3.1: Distribution of TDPs in each Nordic country, divided by their administrative level or coverage.

Looking at the duration of the TDPs analysed, there is large variation. They had a timeframe of between two and 15 years. Three categories for the duration of TDPs were created (see Table 3.2). Most of the plans had or have a medium-term lifespan of between five and eight years (42 TDPs), or a short-term lifespan of up to four years. This category contains 34 TDPs. Just under a fifth of the sample, 17 TDPs, had a long-term lifespan of nine years or more. Not all TDPs had a clearly defined duration, and were therefore classified as such. The median duration was 6.3 years. The table below shows the classification of the reports included, according to duration.

Lifespan of strategy document	#TDPs
Short-term, up to 4 years	34
Medium term, 5-8 years	42
Long term, 9+ years	17
Unassigned/Not Applicable	17
Sum	110

Table 3.2: TDPs classified by lifespan.

The tourism development plans for Nordic rural regions included are shown by the coloured areas on the following map (Figure 1.1).

The different TDPs from the rural regions of Nordic countries gathered for this research vary greatly in detail and length. As mentioned earlier, some are detailed management plans for tourism development, while others are closer to being strategic policy documents for increasing tourism. But how the TDPs and tourism strategies were made and developed also varies considerably. This led to the creation of additional classifications for the TDPs included in the research. These were therefore additionally classified according to how the process of developing them took place. This resulted in four categories, from an institutionally led process with very limited participation and inputs from people outside, to a broad participation process with key commercial tourism operators as well as representatives of civil society organizations, volunteers, residents, etc. The TDPs analysed were classified within these four categories, based on their description of the process leading to the formulation of the document (See table 3.3).

Figure 1.1: Map showing the regions covered by the data that was gathered for the research.

BOX 3.1: TYPOLOGY: TDPs PROCESS

Institutionally led process, with very limited participation and inputs from people outside the leading institution.

Consultancy led process, with very limited participation and inputs from a broad spectrum of actors.

Broader participation—an inclusive participatory process involving key commercial tourism operators in the development of the TDP, in addition to institutions and possibly consultants.

Broad participation—an inclusive, participatory process with involvement of key commercial tourism operators, representatives from other sectors, authorities as well as civil society organisations, interest organisations, volunteers, etc.

TDP process type	Institutionally led process	Consultancy led process	Inclusive, tourism	Inclusive, broad	Total
Denmark	10	1	5	14	30
Norway	6	1	10	5	22
Sweden	5	2	16	3	26
Iceland	0	1	6	0	7
Finland	2	1	10	8	21
Total	23	6	47	30	106

Table 3.3: Distribution of TDPs according to process typology, Faroe Islands, Greenland and Åland excluded.

3.2 Frequency of variables in TDP coding

The frequency with which the variables are used in the coding of each TDP from one of the Nordic rural regions is one way to describe the result of the coding, and thereby, the TDP content. This is presented in Chart 3.1 below, showing a crude overview of the contents of the different tourism plans of the Nordic rural regions. Even so, it does not indicate how detailed particular discussions on the different themes are, or the extent to which a theme is treated in different TDPs.

Chart 3.1: The chart shows the frequency with which each variable is employed (at least once) in all the TDPs (N=110) included in the research.

This chart includes all variables, from the one mentioned most often to the one least mentioned. For example, it shows that issues of coordination and collaboration are present in 92% of all TDPs, while experiences of the negative impact of tourism only appear in 9% of the analysed TDPs (Ål, Gl, & Fo included).

From this it can be gathered that the majority of the documents used in the research mentioned the importance of better coordination and collaboration internally, when it comes to tourism and destination development. A total of 92% of TDPs mention this, which puts 'coordination and collaboration internally' securely on the top as the theme that appears in most of them. Other high-ranking variables like 'challenges', 'expectations of growth', 'origin of tourists', 'sustainability concerns', 'securing local benefits', 'seasonality and extending the tourism season' along with 'nature-oriented tourism' are present in 64.5-69% of the TDPs identified.

Closely behind come themes like 'securing added value in other sectors', 'gastro-tourism', 'expectations of local job creation' and 'authenticity', along with increasing 'education and competence' in the tourism sector. These are present in 56.5-63.5% of TDPs. 'Nature protection and reserves' is brought up in 42% of them, and 39% have some mentions of so-called 'functioning tourism territories'. The variables that fall behind somewhat are 'tourist user groups', 'the right to roam', 'natural resource management', and 'attracting new people', which are mentioned in 25.5-31% of the TDPs. At the same time, the themes raised in the fewest TDPs include 'experienced negative effects of tourism', which only 9% of total TDPs have discussions or mentions of, while 17.3% bring up 'avoiding negative impacts' and 23.5% discuss 'cruise tourism'.

Looking at the overall dataset of TDPs and related documents divided by country indicates some national variation in what the TDPs highlight and what issues are covered in their discussion. Consequently, an analysis of the frequency of the use of variables was carried out for the different national sub-sets of TDPs from the Nordic rural regions.

3.2.1 Variation between countries in frequency of code use in TDP analysis

The chart below (3.2) shows the percentage of TDPs in each country where a variable appears at least once. Although some variables are raised frequently in the overall dataset, some considerable national differences are also present (noting that where there is no bar, the value is zero). In this analysis, Åland, the Faroe Islands and Greenland are excluded, due to their very low number of TDPs.

Frequency of use of variables in coding of TDPs, by Nordic country

Chart 3.2: Frequency of TDPs (%) in which a variable is used (one or more times), by Nordic country.

For example, one of the national variations that the chart shows is that while Norway, Iceland and Finland all have some TDPs addressing the experienced negative effects of tourism, there is not a single mention of this in Denmark or Sweden. At the same time, discussions on the right to roam are present in around 70% of Icelandic and Norwegian TDPs, while that number is just above 20% for Denmark and under 15% for Finland and Sweden. A significant majority in all countries discuss the need for further internal collaboration in tourism development, and in most countries expectations of growth is brought up in the majority of TDPs.

A detailed analysis of the frequency of the use of variables has also been performed at national level. Please consult Annex 3 for this national analysis. For all countries, sub-national TDPs give much attention to economic growth and expectations thereof, as well as to job creation, competence development, and coordination and collaboration. The comparison between countries can indicate that the coding of TDPs in Iceland, Finland and Norway seems to be more detailed (or that TDPs tend to be longer) and the majority of the coded documents from those countries cover quite a number of the defined variables. In Denmark and Sweden, the overall frequency of certain variables is far less than in the other three large Nordic countries, implying that fewer issues are covered in their TDPs. This can be caused by different factors—for example the type of document, its length and detail. This varies between regions and nations, which can have a considerable impact on the topics covered and the depth in which they occur. In Iceland, six of the seven TDPs included are detailed Destination Management Plans for each region outside the capital area, and all of them led by the Icelandic Tourist Board and developed at the same time. It is therefore natural that similar topics are covered in all the Icelandic documents, compared for example to TDPs from Denmark, which was created over a different time period, at different administrative levels and with the involvement of different stakeholders. Some particular variables regarding the 'right to roam', 'avoiding negative consequences' and negative experiences connected with tourism also seem to be reflected upon particularly frequently in the more Arctic regions, or those related to cruise tourism, as in Iceland and Norway, while they are absent, or almost absent, in TDPs from countries like Sweden and Denmark.

Denmark stands out as a country where a large proportion of sub-national TDPs deal with the regional development aspects of tourism. This is expressed, for example, through a high frequency of TDPs coded with the variables 'secure local benefits', 'secure value-added in other sectors', and 'in-migration/attraction of new population'.

Gastro-tourism is an aspect coded for in two-thirds of the Finnish subnational TDPs. Overall, sub-national TDPs from Finland also pay more attention to sustainability concerns, which is the variable used in the highest number of TDPs from that country. Nature-oriented tourism is coded in more than seven out of ten plans, and collaboration between geographical units, expressed as attention given to functional tourism territories is afforded more coverage in the Finnish material than in other countries.

The sub-national TDPs from Iceland are notable in that all seven are coded with 'avoid negative impacts'. This is in contrast to the other four large Nordic countries, where this variable is among those used for least number of TDPs. Similarly, issues of 'right to roam' or public access to nature and other public goods are present in the majority of TDPs in Iceland, as it is in Norway—contrasting with a much lower proportion of TDPs coded with this variable in Denmark, Finland and Sweden. Furthermore, the Icelandic TDPs all give attention to sustainability concerns, nature protection and challenges related to tourism.

A high proportion of the subnational TDPs from Norway are concerned with nature-oriented tourism, right to roam issues and sustainability concerns, while regional development aspects (expressed in large proportions of TDPs being coded with the variables for 'secure value-added in other sectors', 'secure local benefits' and, to a lesser extent, 'in-migration/attraction of new population') also are among issues frequently coded in the Norwegian sub-national TDPs.

Sweden is notable for having a relatively high frequency of TDPs coded for 'functional tourism territory' and a corresponding high frequency for the variable for 'coordination and collaboration', both indicating that collaborative aspects of tourism development are prioritised. 'Challenges' is only coded for half of the sub-national TDPs from Sweden, which, combined with a low frequency of TDPs coded for 'avoid negative impacts' and the absence of use of 'experienced negative impacts', indicates that the TDPs from that country present a less critical analysis of tourism development than do TDPs from other Nordic countries.

3.3 Frequency of variable use—comparison between Nordic countries

Looking at how many TDPs mention different variables provides only a limited story. You do not get a clear picture from this of the detail from each individual variable or topic, and how (and how much) it is discussed in tourism strategies overall. For example, mentioning the value of

developing tourism sustainably once in a document of up to 100 pages does indicate that the subject is not formulated in much detail. It is therefore also important to see how often different topics, or variables, were coded in our analyses of TDPs, as the chart below does. This data offers a more accurate story about the level of detail or engagement of TDPs regarding each variable employed. Since these statistics rely on the frequency of coding for a certain variable, instead of just counting whether it was present in the coding of that TDP, it is possible to include the Faroe Islands, Greenland and Åland (where the total number of documents included for each country amount to just one or two).

Looking at the frequency of variables for all 110 TDPs included provides an interesting and useful overview of how different topics are distributed at a 'pan-Nordic level'. The chart below presents each individual variable in bars in descending order, calculated as proportion of the overall frequency of codes used in the analysis of all TDPs. For example, a total of 6,680 text sequences were coded in the analyses of all 110 TDPs. If any 668 of these were related to a particular variable, this would constitute 10% of the total coding. The cumulative total is represented by the orange line.

When looking at how these 668 coded sequences were divided between the 22 variables, as presented in the chart below, clearly shows that the variable 'coordination and collaboration internally' is by far the most used one in the total dataset. It is also the most prominent in coded material for the four largest countries—Denmark, Finland, Norway and Sweden, while also being quite common in Iceland, Faroe Islands, Greenland and Åland as well. 'Challenges' covers 8.1% of total coded variables in our TDPs, with 'nature-oriented tourism' at 7.1%. Discussion that was coded as 'sustainability concerns' occurs in 6.4% of proportional variable codes, while 'education and competence building', 'expectations of growth', 'functional tourism regions', 'nature protection and reserves', 'seasonality and extended season' and 'secure local benefits' come next, covering between 6.1% and 5.2%. The ten aforementioned variables are those which proportionally cover the largest share of everything coded for in this research. Collectively the quantity is almost 70%. Topics that were coded under the variables designated 'tourist origin' and 'endogeneity/authenticity' had a coverage of between 4.9% and 4.4% of codes, bringing the total proportion of codes up to nearly 80%.

Chart 3.3: Pareto chart for TDP variables in all countries, shown in descending order and calculated as a proportion of the overall frequency of the use of codes.

A similar analysis regarding the frequency of particular variable use as proportion of total variable use was carried out for sub-sets of the material related to each Nordic country. We have identified some national similarities and differences on the basis of a statistical overview of both the characteristics of national TDPs based on code frequency, and also the frequency of variable

use within each country. The distribution of codes is more even among the different variables in the larger and more populated nations, while distribution in the smaller autonomous regions (Iceland included) tends to be more concentrated around specific topics. This may be explained by the fact that larger countries with larger populations have more TDPs included in the dataset. A greater quantity of data, along with more diverse regions in a country, naturally led to more differentiation, plus a variety in prioritisation when it comes to tourism development. It is also a solid reminder that although descriptive statistics like those presented earlier in this chapter can be useful, they are just that: descriptive for this particular data. It is therefore not possible to draw too many conclusions from charts and descriptive statistics which are constituted from only a few documents, or even just a single document or two. Please refer to Annex 4 for these national charts and descriptive analyses.

For an easier (and perhaps a more illustrative) way of comparing the frequency of different variables across countries, the following chart, 3.4, will be useful. It indicates all the variables included, and how the distribution of codes was divided between those variables. Each country has its own colour, and the distribution of codes is presented as a proportion of total coding frequency for each country. The total number of coded variables for each country therefore adds up to 100%.

Coded variables in the TDPs compared at national level calculated as a proportion of the overall frequency of codes within a country

Chart 3.4: Frequency of all coded variables in TDPs, compared at national level. The frequency here is calculated as a proportion of the overall coded variables within a country, so the number of coded variables adds up to 100% for each country.

Highlighting the most significant differences and similarities between the coding patterns at country level includes the very distinct role played by the variables identified as 'right to roam', 'avoid negative consequences' and 'experienced negatives'. In Denmark, Finland, Sweden and Åland, these variables are hardly used in the material; whereas there is some mentioning of all three in the Norwegian material (although less than 5%). On the other hand, they add up to over 11% of coded text portions in Greenland, 15% in Iceland, and 24% in the Faroe Islands. 'Sustainability concerns' is another variable which is used with very different frequency in sub-national TDPs from different Nordic countries. At one end of the spectrum, Greenland and Åland devote 2% or less of coded material to sustainability concerns. Denmark and Finland show comparable patterns, with under 5% of coded material connected to this issue; while for Norway, Sweden and Iceland it is between 8% and 10%, and for the Faroe Islands it reaches 15%.

Cruise tourism is another theme with a distinctive pattern. Denmark, Finland and Sweden employ less than 1% of the coded text-bits on cruise tourism (followed by Åland, with around 2%); whereas Iceland, Norway and the Faroe Islands direct around 5% of their total coded text-bits to this theme. The number increases to 10% in the material from Greenland.

Regarding attention given to the regional development aspects of tourism, a different pattern is observable when comparing the national analyses of coding frequency. The variables 'secure local benefits', 'in-migration and attracting new population' and 'securing benefits in other sectors' add up to close to a fifth of the coded text-bits in Greenland (21%) and Denmark (18%). This is followed by Norway and Finland (13%). Sweden, Iceland and Åland are comparable, with 10% or less (S=10%, I=9%, Å=8%). Capacity development and education is another concern closely related to the intersection between tourism development and regional development. This is the second most frequently used variable in the Danish TDPs', fourth in the Finnish, sixth in the Norwegian material, and the seventh in the Swedish material. It is twelfth in the Faroe Islands, thirteenth in Greenland, and in Iceland it appears among the five least-used variables.

While the themes of economic turnover, value created, economic growth created from tourism, and local job creation are among the themes that are very strongly formulated in all TDPs, they also show a distinct pattern across the material when it is grouped into national sub-sections. Åland and Greenland stand out, with between 17% and 16% of coded text-bits concerned with these issues. Whereas in Norway, Sweden, and Denmark the levels are a little lower (13%, 12% and 10%, respectively). Iceland, Faroe Islands and Finland are comparable, with economic and job expectations taking up between 5% and 6% of the coded text-bits.

3.4 Summing up

When reviewing descriptive statistics for the coding of all the TDPs, and the fact that close to 80% of coded variables concentrate around 12 of the total 22 variables it gives an indication that those 12 topics and themes are the ones that are prioritised in TDPs. These include coordination and collaboration issues, expectations of economic growth, competence development, challenges (in general, and related to seasonality), sustainability concerns, nature protection and reserves, and nature-oriented tourism – as well as regional development aspects of tourism (such as how to secure local benefits from it). At the other end, the ten variables which were mentioned the fewest number of times add up to the remaining 20% of coded material. Those that were then coded for the absolute fewest number of mentions were the variables on 'the right to roam' and 'avoid negative impacts', which each cover 2%, and then 'in-migration and attraction of new population', covering 1.2%, along with 'experienced negative effect of tourism' which lands at just 0.7%.

Variables such as 'secure added value in other sectors', 'gastro tourism', 'user groups', 'expectations to local job creations', 'cruise tourism' and 'natural resource management' took up an intermediate proportion of the codes, from 3.2%–2.2% each.

However, many of the topics which were coded for the fewest times are nonetheless very important tourism development issues in many regions of the Nordic countries. Some of them are also themes that form the focus of much debate, and have been widely discussed in tourism research in recent years. They include experiencing and avoiding the possible negative impacts of tourism, expectations of local job creation, and the role of cruise tourism and right of public access (i.e. Saarinen, 2015; Rantala *et al.*, 2019; Øian *et al.*, 2018; James, Olsen & Karlsdóttir, 2020).

In the next four chapters, closer attention will be given to (mainly) qualitative, thematic analyses concerning the themes of economic and job-related expectations from tourism (Chapter 4), collaboration and organisation (Chapter 5), other issues and concerns, especially related to seasonality, infrastructure and investment, regional development perspectives in tourism and environmental concerns (Chapter 6), as well as the way in which sustainability concerns are treated in the sub-national TDPs, if at all (Chapter 7). Some of these themes stem from their importance in the TDP material; others are specifically related to the initial purpose of the research and the mandate as laid out by Nordregio's Thematic Group on Sustainable Rural Development (TG1). Some of those themes are only fairly weakly represented in the TDPs. But a more qualitative analysis of such topics reveals that although they do not take much space in the entire material, in specific regions they are widely considered to be some of the most important matters for understanding the future of tourism development.

4. Thematic analysis: Expectations of economic growth, job creation and competence development title

One main theme that can be taken from TDPs in Nordic rural regions is the clear longing to expand tourism activities in such a way as to further encourage economic growth. Almost every TDP highlights growth as a top priority—either in terms of increased profitability, more revenue, increased number of overnight stays, or jobs creation. Most of the challenges in tourism development which are mentioned in TDPs are also related to expansion, which is considered the prerequisite for what most often seems to be the end goal: securing economic growth. Although this subject does not necessarily take much space in the TDPs analysed for our research, economic growth is overwhelmingly the underlying theme for almost all discussion on tourism development. According to the content of TDPs, expectations of a growing tourism industry in rural regions of the Nordic countries are therefore high. These expectations, although in the end they all revolve around economic growth, can nevertheless take different forms. Often expectations of growth are simply stated by naming a specific goal of increasing tourist numbers within a defined period of time, without further deliberation on how and what the intended growth is intending to achieve. Some TDPs, however, discuss specific ways to achieve sustainable growth in more detail, as well as how growth can contribute to rural development and what benefits it can bring to the local population.

This sub-chapter presents the main themes identified in the TDPs on expectations of growth from increased tourism. First, expectations of growth, as presented in the various TDPs in the Nordics, are addressed. Second, the more detailed expectations for local job creation, investment and the possible multiplier effects of increased tourism are further analysed. This is before discussion of the expected 'side effects' growth in tourism can bring—for example, an increased level of competence among tourism workers, and positive demographic changes.

Tourists visiting Dettisfoss waterfall in northern Iceland.

Photo: Ágúst Bogason

4.1 Aiming for economic growth

'Expectations to growth' is one of the most commonly coded variables in the research. The importance of economic growth, led by an increase in tourism, is quite often at the forefront in the TDPs. Many of them start by citing the historical increase in tourism, often by referring to an increase in overnight stays or in estimates of tourist spending. From these numbers, calculations based on past trends are then commonly presented in order to underline possible future economic gains from further tourism growth. TDPs then often present a goal of increasing tourism by 5%, 10%, 20% or even 100% within a given number of years.

"By 1st January 2030, turnover in the tourism industry shall have increased by 100%," it says in the TDP from Tinn municipality (Tinn Reiselivsstrategi, 2018–2029). Also in Norway, Sogn and Fjordane (2010-2025) state in their TDP that the "goal is to increase from 1.5 to 2.3 million visitor days in the county by 2025." In the Danish TDP for the island of Bornholm (Bornholm, 2017–2019), the main objectives of destination development are laid out, while the overall aim is summed up at the end as: "Our mission is basically to make the cake bigger and to secure more guests for the island". The Danish municipality of Hjørring concludes its discussion on the need for tourism growth in a similar way, but with a much clearer agenda, stating: "We simply require more guests to the destination; [ones] that stay for several days and as a result spend more money" (Hjørring kommune, 2016).

The growth of the tourism industry is sometimes presented as the main goal, and in a number of the TDPs, economic growth and the desirability of an increase in tourism does not include any detailed reasoning or operationalisation. It often seems to be taken for granted that increased tourism will bring about local benefits, contribute to regional development and create new opportunities for the host region. In some instances, growth goals are linked to national or regional policies on tourism increase, however. An example is Hedmark in Norway, which has set a goal of a 20% increase in line with the national policy, another is Gribbskov in Denmark, where: "...the Tourism Strategy 2016–2020 is in line with Visit Nordsjælland's target to grow by 20% by 2018" (Hedmarks fylkeskommun, 2010; Gribbskov kommune, 2016–2020).

It is therefore common for tourism growth goals at regional and municipal levels to be linked with regional policies and national growth goals. Intergovernmental forums have also encouraged tourism development, as indicated earlier in relation to the Nordic Council of Ministers' Plan for Nordic Tourism Cooperation, from 2019 drawn up on behalf of the Nordic business ministers and closely linked with the cooperation programme for business and innovation policy, 2018–2021. The Plan for Nordic Tourism Cooperation sets the scene by stating that, "tourism has made a substantial contribution to job creation and growth". It then goes into more specific means by which tourism can contribute to more thriving rural regions (Nordic Council of Ministers, 2019). It is therefore evident that in the local, regional, national and international arenas occupied by the Nordics, the main objective of tourism development is growth.

In the Icelandic TDPs there are also references to surveys of local people, which show that the majority of them consider tourism to be having a positive impact on their region. It is added that local people themselves consider tourism an important regional economic source. "Residents were not in doubt about the economic importance of tourism for the area," the TDP from Reykjanes (2018–2021) says. The West fjords in Iceland has a similar reference. "The vast majority, or eight out of every ten inhabitants of the Westfjords, consider tourism to be economically important to the local community" (Vestfirðir, 2018–2021).

While a few TDPs do not discuss or formulate what benefits increased tourism activities will be able to bring them, and what is necessary for that increase to take place, there are other TDPs which discuss in some detail how and what the intended growth can contribute.

The Danish island of Bornholm attracts many visitors each year and tourism is one of the most important sectors for the local economy.

Photo: Ágúst Bogason

4.2 Expectations for investments, local job creation and multiplying effects

"Finland's tourism strategy identifies four reasons why the development of tourism industries should be promoted. The multiplier effects of tourism on the economy, the highly employment-intensive impact of tourism, the prosperity and well-being that tourism brings to the regions, and the high growth potential of tourism," states the TDP from Haminan (2015–2020) in Finland.

This reference to the Finnish national tourism strategy from Haminan is quite descriptive of what other Nordic TDPs highlight as the main purpose of growth in the tourism industry. Tourism is commonly viewed as a source of employment in rural areas, where employment opportunities are often scarce. It is also seen as having great growth potential, and that an increase in tourism can also produce a multiplier effect in relation to other industries.

In the Danish TDP from Frederikssund municipality (2013–2020), the main goal of tourism development is said to be "to increase employment and turnover". To achieve those objectives there are two sub-targets that must be met over the coming years—"more tourists and increased consumption." It is therefore highlighted repeatedly in many of these TDPs that with more tourists and more spending, increased local employment is bound to follow. The complex interplay of many factors surrounding tourism development is again displayed in discussions on this subject in the TDPs examined. The so-called ripple effect is substantial, where one thing cannot happen unless another happens as well, while the different factors involved are internally connected. In this way, an increase in tourist numbers is often linked with attracting new investment, which again can attract more visitors, creating demand for more labour in a positive, spiralling effect. Accordingly, the high-growth aspiration expressed in TDPs right across rural Nordic regions can almost always be linked back to creating more employment and generating local jobs.

"A prerequisite for sustainable development of the hospitality industry is that there are companies with good profitability. Only then are there conditions for product development, investment, and recruitment of more employees," says the TDP from Oskarshamn in Sweden (2016–2025). The example from Oskarshamn and others from the TDPs that tell a similar story can be viewed as expectations of multiplying effect within the tourism sector, generating more jobs. But tourism is also viewed as having positive effects on other sectors since tourists consume a variety of different products and experiences. Expectations that the consequences of increase in tourism will have positive effects in other sectors are therefore also prominent in the TDPs. These consequences are even in some instances put into context with a more circular economy, resilience and sustainable development.

"Increasing the number of guests will lead to increased value creation in the tourism industry and have other economic effects in the local community, so that this strengthens, rather than weakens, the effects of tourism on the environment, climate, local culture and other important sustainability factors," is stated in the TDP from Sogn and Fjordane (2010–2025) in Norway. In South Iceland, the local food industry is also highlighted as a beneficiary of tourism growth: "The positive economic impact of tourism in the South Iceland are reflected, for example, in a more varied business sector, increased employment and business opportunities. Tourism also has a positive impact on commerce in all areas. The multiplier effects of tourist spending extend widely and have a positive impact in different industries, such as agriculture and sales of marine products." (Suðurland, 2018–2020)

The TDP from East Iceland takes a similar approach to the multiplier effects of tourism as their neighbours in the south, but adds that, "Tourism can thereby keep remoter communities alive and prosperous, provide facilities that might not be sustainable by the population of the local community alone, and help drive the demand for skills development leading to higher paid jobs, as well as inject fresh spirit into local cultural and artistic life" (Austurland, 2018–2020). Greenland's national tourism strategy (2016–2020) also highlights the synergies that tourism growth can bring to other sectors. "This growth potential for additional sales and employment ... will help to spread the socio-economic benefits across the country and make tourism a major business for a large part of the Greenlandic population."

Regional economic growth, triggered by an increase in tourism, is therefore commonly considered the foundation for important rural development issues. Mainly this is centred around job creation and investment, but sometimes other beneficial factors are identified as well.

4.3 Expectations of 'positive side effects' from growth—increased competence and attractiveness

While the principal motivation for tourism expansion in the rural regions of Nordic countries remains increasing economic revenue and creating jobs, TDPs also express other expectations. Increasing competence and education within tourism-related employment appears to be an overall sought-after goal, and is presumed as something that further tourism growth can provide. A closer look at what the TDPs say about these aspects shows that often the discussion is about making the existing local jobs in tourism more secure and less seasonal.

"The ambition is a significant growth in the tourism and experience industry in Finnmark, to increase the number of full-year jobs in the tourism industry," the Norwegian Finnmarks regional planning strategy (2016–2019), which includes a focus on tourism development, states. Similar intentions are found in TDPs in all the other countries, while many also aim for the tourism and hospitality industry to be considered and developed as an one that demands a higher degree of competence. Some other Norwegian examples of TDPs even have discussions about the obligation of tourism-related actors to contribute to this cause by working together with public authorities in developing relevant educational programmes for people working in the industry.

Tourism growth, competence-building and creating local jobs are also connected with attracting new permanent residents to a region according to some TDPs. It is also related to the ability to create circumstances which can prevent people already living in regions with limited economic activities from moving away. While this is not as widely discussed as job creation and competence building, it is, as with many other factors, interlinked with many other aspects of tourism development.

"By developing and consolidating the hospitality industry in Dalarna as a base industry and growth area, the attractiveness of Dalarna as an investment object can strengthen," is how Swedish Dalarnas regional TDP (Dalarnas strategi 2018–2030) puts it., The Danish Helsingør Municipality says that: "In addition to the economic effects of increased tourism in relation to increased turnover in the tourist industries and increased employment, there will also be effects that have more indirect significance for Helsingør Municipality as an attractive place to live" (Helsingør, 2016–2020).

The attractiveness of a place is therefore sometimes said to be a necessity for its development, while others say that it is the other way around: investment and tourism growth is the prerequisite for attractiveness. Either way, this again underlines how intertwined the different aspects of tourism are.

The innovation strategy for the Swedish Jämtland region (2014–2030) also illustrates how significant demographic challenges are for many regions and municipalities, while acknowledging how important creating new jobs can be for a particularly vulnerable area.

"Many regions and municipalities face very large demographic challenges as the tax base and the number of people of working age declines, the population grows older, and the shortage of skilled labour grows. Demographic development will have major consequences for, among other things, the provision of commercial and public services, the provision of skills, housing, and business development," it says in the Jämtland strategy, where tourism is specifically named as one of the key sectors for innovation and growth in the future. The expectation that tourism growth can bring about increased employment opportunities, create more valuable jobs and have positive multiplying effects on other industries is therefore very high in the Nordic TDPs.

However, seasonality has a great influence on the ability to create higher value, more permanent jobs. Increasing the competence and educational level of tourism workers is closely connected to the limited time that competent employees are needed in a very seasonal industry. The various TDPs therefore address this dilemma too: the fact that the nature of seasonal tourism hinders the possibility of hiring people with higher skill levels and competences. As a result, attracting new permanent residents, or retaining those that possess the required skills and education, becomes a problem when the opportunity for stable all-year work is not available.

The lack of local competence, and keeping those who are qualified, is therefore viewed as an obstacle which destinations see as necessary to overcome, first and foremost by creating the conditions for providing steady, valuable jobs. Seasonality plays a central role in this inability of the Nordic rural tourism industry to turn itself into a competence sector through stable work conditions. This is considered a central challenge, and the necessity of turning the tourism into a year-round industry is therefore frequently mentioned as a priority in TDPs from many of Nordic rural regions. Seasonality and its effects on the possibility of employment is discussed further, along with other identifiable and significant challenges in Nordic rural tourism development, in Chapter 6.

Winter tourism in certain rural regions in the Nordic countries has grown considerably over the last decade.

Photo: Ágúst Bogason

4.4 Summing up

According to our analyses of TDPs in Nordic rural regions and municipalities, economic growth is clearly viewed as the most sought-after benefit of increased tourism. It is seen as a source of employment generation, with the possible multiplier effect providing a boost in revenues to other industries across a wide spectrum. The synergies between tourism and other industries are therefore often highlighted, and economic growth from tourism is also considered important for positive demographic development, by contributing to job diversification and increasing the attractiveness of a place, both for investment and as a place to live. There are also expectations present in many TDPs that tourism-related work can develop into a more competence-demanding sector, and as a result create more valuable jobs. The prerequisite for this, however, is the possibility of making tourism a year-round industry, providing stable and steady employment. Because of this, seasonality issues are viewed as the main obstacle for further growth of the tourism sector in the rural Nordics. The discussion about the value of economic growth from tourism, and what is needed for it to be able to develop sustainably, therefore involves a complex interplay of factors across many sectors and challenges, in which everything is seen as connected.

To tackle these issues sufficiently, and to be able to contribute to sustainable tourism growth, many of the TDPs examined express the need for more widespread collaboration and coordination, as well as for more accurate data and research on tourism development. Some TDPs mention uncertainty about whether economic gains do really benefit the regional economy

to the extent that is sometimes claimed or taken for granted. These issues are addressed further in Chapter 6, which is about securing local benefits and addressing possible economic leakages. To shine a clearer light on these matters, more accurate data and research on the subject are clearly needed. More reliable measurement tools are, in fact, one of the things the majority of TDPs claim is needed, along with more collaboration and coordination on tourism related matters. This is discussed further in the next chapter.

5. Thematic analysis: Collaboration and organisation of tourism development

Literature and prior research on the subject of destination management and tourism planning has, in recent years, emphasised the importance of cooperation. Widespread collaboration tends to lead to better consensus about the strategies and policies which can gain more legitimacy (Pechlaner & Innerhofer, 2018). The majority of TDPs and strategies covered in this research reflect this and discuss the importance of collaboration in the quest for developing a growing and possibly more sustainable tourism destination.

This chapter first presents an overview of the process through which the TDPs analysed were drawn up, followed by an analysis of four themes relating to coordination and organization: 1) the issue of coordination locally between tourism actors, with the authorities, as well as coordination between different administrative levels; 2) the issue of data needs, and the coordination it takes to generate such data; 3) coordination and collaboration related to marketing and destination branding, and 4) coordination and collaboration with actors outside the tourism sector.

During the initial analysis and coding of TDPs, it was clear that they have often been developed through very different processes. As mentioned in Chapter 3, this led to the development of a typology for TDP processes (See Box 3.1). Focusing on the five largest Nordic countries, almost three-quarters (79 of 110 plans⁵) were completed through a broader participatory process, either with the involvement of key tourism operators, or tourism operators and other stakeholders along with the general public. Plans included of this type were described, for example, as collaboration between the municipality and the private sector, including entrepreneurs and public-private partnerships; think tanks; frequent dialogues; networks; large-scale meetings and debates including educational institutions, private sectors and active residents (as for example Faaborg-Midtfyn, Denmark). Or they were broad processes with a wide range of public and private actors involved from the start to the end of the process, with open meetings and extensive use of social media, including with the use of development of scenarios (as for example Buskerud, Norway), or as a collaborative process between tourism development units, regional and municipal authorities, as well as the private actors within tourism (as for example Midtjylland, Denmark).

The remaining quarter (28% of TDPs) were created through less open processes, led by a territorial authority (such as a municipality or region), or by a consultant hired in to lead the process, with limited stakeholder involvement. Examples of this type of process are found, for instance, in Telemark, Norway, where a plan for more sustainable tourism was the result of coordination efforts between two regional authorities; or in Southern Zealand and Moen, Denmark, also as a collaboration between municipalities. The following table shows the classification of the development process for the TDPs in each country.

A considerable portion of the TDPs analysed are devoted to the themes of coordination and collaboration internally (between stakeholders within the territory covered by the TDP). This is the most frequently used variable in the entire material, and the most frequently used variable for the documents analysed from Denmark, Finland, Norway and Sweden. The frequency of use of this variable during the coding process reflects the importance of coordination and collaboration within this broad 'sector'. In what follows, we will discuss the content of the coded text, organised around issues of coordination, both between actors within the geographical area of the TDP, with public authorities, and between actors and authorities from different TDP areas (5.1), with different data needs (5.2), and with different marketing and destination branding (5.3).

5. See table 3.3 in Chapter 3; although Faroe Islands, Greenland and Åland are not included in that table.

5.1 Coordination among tourism stakeholders and with public authorities

As mentioned earlier, one of the main purposes of making a Destination Management Plan (DMP) is encouraging cooperation. In addition, successful practices as part of a TDP rely on creating networks of tourism stakeholders and public and private interests, regionally and locally (Árnadóttir, 2019). Even though quite a few of the TDPs have in fact been drawn up by a rather broad range of stakeholders, judging by how often the need to work more closely together is mentioned in the plans, it is clearly considered a priority to further encourage cooperation.⁶

This longing for further collaboration is presented in different ways in different TDPs. While some emphasise the need for better cooperation between public and private interests when managing a destination, others focus on local/regional/national cooperation in tourism development.

The Plan for Nordic Tourism Cooperation 2019–2023 published by the Nordic Council of Ministers in 2019 emphasised that any policy on tourism and any framework for collaboration must be able to deal with the complexity of the sector, and the many converging interests it and the Nordic countries represent. Therefore, Nordic countries are said to be able to benefit greatly from tourism, as they have done in many other sectors throughout the years, as result of sharing their knowledge and best practices, and collaborating in a variety of fields. Many of the local and regional TDPs express similar view, only scaled down to their local contexts.

There is common call across most TDPs for better (i.e. clearer and more efficient) collaboration between national, regional and municipal levels of governance. Another regular call is for strengthened cooperation and coordination in tourism development between the public authorities and private actors.

"A crucial collaboration is that between the operators of the hospitality industry and politics. In order for the hospitality industry to continue to grow, politicians at national, regional, and local levels must be well-versed in the hospitality industry and its potential. Understanding is strengthened by a dialogue with politics, with a solid knowledge base on the structure and size of the industry as a basis. With clear evidence, well-balanced political priorities can be established," it says in the tourism strategy of Västernorrland in Sweden. Later, the same document adds: "It is only when authorities, transporters, region, destinations, companies and associations have a common goal, and a clear image regarding infrastructure planning, that visitors can move smoothly to and within the destination" (Västernorrland, 2017–2025).

Based on TDP analysis, particular regions seem to experience a lack of understanding among national or regional authorities in relation to the importance of the tourism sector for the rural areas. This includes particular local needs, as well as the importance of integrating tourism plans into other relevant policy documents. This again underlines the reality of complexity, and the multitude of issues the tourism sector affects, and is affected by. As mentioned earlier, tourism cannot simply be categorised as 'one industry'. The recognition of this by tourism actors and by sub-national authorities is reflected particularly strongly in TDPs developed on the basis of a broad-based, participatory process, involving not only the public sector and private tourism actors, but also civil society organisations, business development advisory teams, and other locally engaged interest groups. Södra Småland's tourism strategy (Sweden), for example, states that, "Tourism development must place great emphasis on cooperation in the development of a quality sustainable visitor industry. Everyone wins through a richly varied and good collaboration" (Södra Småland, 2013–2020).

The Nordic Council of Ministers Plan for Nordic Tourism Cooperation (Nordic Tourism Policy, 2019) stresses the cross-sectoral nature of tourism, as a complex sector representing several industries and the requirement for policy coordination and collaboration across policy areas. Many of the sub-national TDPs also point to the fact that considerable variation (in tourism pressure, attractions and infrastructure) within an administrative area makes it important to pay attention to local interests and opportunities. This sometimes limits the relevance of 'averages' (for example, Telemark regional plan for tourism, 2011–2024, Norway).

6. The need for 'coordination and collaboration internally' is discussed in all the Icelandic and Norwegian TDPs, over 90% of the Danish documents, and in the majority Swedish and Finnish TDPs. Discussions on the matter are also present in the national tourism strategies of Åland, the Faroe Islands and Greenland. Overall, this amounts to 14.7% of all the coded material for this research, which makes it by far the most discussed topic in the tourism strategies and management plans.

Östergötland, in Sweden, for example, sums up the complexity of tourism in its TDP, by saying: "The hospitality industry differs significantly from most other industries. There is no one operator which delivers what the guest buys on a trip to Östergötland. The 'service' is provided by a number of different actors, some of whom are responsible for housing, others for meals, experiences, travel and service. Collaboration is a very concrete concept in the hospitality industry—that's how visitors' experiences are produced and delivered." The Östergötland TDP further describes how to deal with this complexity. "'Together' is a keyword for the development of Östergötland, and the tourism strategy describes how we should do business with the help of stronger thematic cooperation and joint processes" (Östergötland, 2016).

The Kiruna Lappland Masterplan has a similar tone to it when focusing on collaboration for sustainable tourism development. It says: "Important and more meaningful cooperation is significant for achieving long-term sustainable growth in the hospitality industry. It is important that collaboration takes place across borders, through joint efforts by, for example, civil society, the municipality, regional authorities, business organisations, the hospitality industry, and market and destination organisations." It then adds that strategic and long-term work is needed to improve the quality of the supply chain in tourism, and that this work should include everyone involved. "The tourism supply chain includes not only transport, accommodation and excursions, but also cafes, bars, restaurants, crafts, food production, waste management and the infrastructure that supports tourism at these destinations" (Kiruna, 2015–2020). This example is also illustrative of the potential for tourism to influence (positively or negatively) civil society and the everyday life of people in a particular area, for example through infrastructural improvements or private sector services that benefit both tourists and the local population.

Even though regions and municipalities have some differences in the way they view the most urgent requirements for better cooperation, and what this additional collaboration could achieve, it is noticeable that an overwhelming majority of TDPs emphasise more collaboration. The cruise strategy for Vestlandsregionen, in Norway (2016–2020), for example, expresses the different opinions of diverse actors quite well. While each relevant actor seems to have a different opinion, all agree that better collaboration is needed, further underlining the need for more coordination and cooperation.

While most of the TDPs analysed in this research acknowledge the importance of collaboration across fields, borders, industries, governance levels and so on, some of them also comment on the challenges related to managing and developing such a complex sector. In the region of Skåne, in Sweden, this is pointed out in their tourism strategy (which focuses on sustainable tourism development). It says: "One of the challenges when designing a strategy for a system made up of so many different stakeholders and actors is that there is no natural group management with a clear mandate" (Skåne, 2012–2020).

This view is also shared by others – for example, in the Norwegian Buskerud, where an evaluation of its TDP has been made (Buskerud, 2016). Here, human resources are considered the main factor that controls how TDPs function as a management tool. Limited human resources in small municipalities can certainly represent a limitation for TDP implementation. Even so, the assessment is that the TDP has been successful as a tool for steering within and between municipalities in the region, whereas private stakeholders within tourism have used the plan as a unifying factor to a lesser extent.

Broad coordination and collaboration in developing a tourism destination is therefore seen both as necessary and as complicated. This chimes with most of the national tourism policies of the Nordic countries that encourage coordination across fields. The Plan for Nordic Tourism Cooperation clearly states that, "...collaboration with other ministerial councils and institutions with tourism-related issues on the agenda is welcomed, e.g. in the policy areas of the environment and climate, culture, food, regional development and cooperation in relation to the Arctic" (Nordic Council of Ministers, 2019).

Nature is generally considered what mainly attracts tourists to the Nordic rural regions. The is from picture from Södermanland in Sweden.

Photo: Ágúst Bogason

5.1.1 Coordination & collaboration between administrative levels: Functional tourism regions

From the outset, the analysis of TDPs sought to understand and map collaboration on tourism. All TDPs included in the research were analysed for mentions of things such as 'functional tourism territories' – meaning that collaboration on tourism between areas or administrative units (*additional* to the geographical unit that the TDP refers to), for example the 'visit organisations', or constructed conceptual 'functional territories', such as islands working together or collective marketing, were coded under this variable.

As might be expected, this variable is used much less frequently throughout the TDPs analysed than the variable for 'coordination and collaboration' in general. Roughly 40% of the TDPs analysed refer to such collaboration outside the geographical area to which they refer.^[7] Often, the coded text discusses the development of a geographically coherent region, so that visitors experience a particular region as one destination (instead of multiple single sites. This is considered a way to make the destination more coherent, to improve the experience for tourists, to improve the ability to brand the destination, and possibly to make people stay longer or use more tourism products. The scale of a 'functioning tourism region' as presented in the TDPs can also be very different.

The national plan on tourism from Greenland (2016–2020), for example, promotes the possibility of presenting Greenland as a part of a greater North-Atlantic tourism region through their partnership with Iceland and the Faroe Islands. While the example of Greenland is a special case, it shows the different scales at which functioning tourism regions can be conceived. However, smaller geographical areas are often those that attempt, or plan, to develop a 'functional tourism territory' covering several municipalities (possibly across borders) in the form of a single tourism region or destination. Our analyses of regional TDPs show that smaller and more remote areas tend to emphasise the need for developing a 'functional tourism region' more than those close to larger urban areas or transport hubs. This is interpreted as a reaction to the trend towards focusing tourism development on 'signature experiences', or basing it on a few, well-known and much branded highlights at each destination.

Again, the development of a functional tourism region can, as with so many other challenges within tourism development, be related back to the need for collaboration among different

7. The issue of tourism collaboration as 'functional territories' is discussed in the Finnish TDPs to a greater extent than with other countries, although there are also regional variations of importance in this respect, within different countries.

actors. Therefore, the need for a collective platform for coordination again becomes apparent in tourism strategies when discussing the need for the creation of a functional tourism region. Smaller regions and municipalities often express a strong longing to belong to a larger cooperation platform through their TDPs. That is, to be better equipped to market themselves, to access markets and to develop themselves as a destination, or as part of a larger tourism region. This often means working across municipalities, as is stated in the Danish municipality of Lejre, for example: "...We want to break the traditional boundaries between municipalities. We do this, among other things, by collaborating with other municipalities to create coherent experience routes" (Lejre, 2018–2020).

In Greenland tourism development faces different challenges. Authorities however are hopeful that growing tourism will be a valuable contribution to the countries economy.

Photo: Leneisja Ljungsberg

5.2 Collaborative demand for, and creation of, better data

Beyond the need for further internal collaboration along with more local, regional, national and even international cooperation, many TDPs also address the need for better access to reliable information on tourism development—such as indicators, measurement tools and qualitative and quantitative data (for example on tourism satisfaction)—in order to create the basis for a knowledge-based development of new concepts and products, and the associated coordination and collaboration that this requires. The need for more reliable and comparable statistical data is expressed widely, as well as the wish for guidelines and indicators for sustainable tourism development with clearer objectives and parameters for local tourism destination development. One such example is the Tourism Strategy from Vækstforum, Region Midtjylland, Danmark (2016–2020). The limited resources of smaller destinations and regions are often said to limit their own possibilities for acquiring such information, and it is therefore argued that the responsibility for providing what is needed should be with the regional or national authorities. A functional platform for working collectively across governance levels and different sectors is frequently said to be missing or not working properly, too. Quite a number of regions identify this as a challenge in developing a sustainable tourism destination. Other places, where formal partnerships for coordination have emerged, speak positively about the experience.

The need for some sort of operating structure—a platform where destination development in a

region is discussed and developed – therefore seems to be a necessity, and certainly what many of the regions desire. Many of them already have such structures in place, whether as the responsibility of local or regional authorities, a DMO, or a more informal cluster of relevant actors (sometimes with inputs from local citizens or civil society organisations). But even where such platforms are established and active, the felt need for further coordination and collaboration remains very present within the TDPs. Several TDPs argue that they consider the economic importance of tourism as insufficiently documented, either in general, or for certain sub-groups of tourism products. These are matters which some destinations want to focus on, for example as a result of environmental factors. Several examples come from the Norwegian west coast—for example from Sogn & Fjordana Tourism plan (2010–2025, Norway), where ‘base vacation’ in cottages or boat-based vacations have been prioritised, but where these (and other) specific types of tourism sub-products, important for the destination, are said to be insufficiently visible in national tourism statistics, including the Regional Tourism Satellite Accounts (See more on Regional Tourism Satellite Account in Karlsdottir *et al.*, 2020).

The lack of more adequate data and research on the regional effects of tourism, target groups and visitors—as well as the economic, environmental and social effects of tourism—are very present in the tourism strategy of the Faroe Islands, as well as the regional TDPs of Iceland. Other regions mention this too, but not to the same extent as the smaller Atlantic islands. The TDP for Southern Iceland, for example, emphasises that nature conservation should be at the forefront when it comes to tourism, and that “is important that tourism, which creates economic value, develops in harmony with society and nature. In this context, it is necessary to improve the quality of tourism and to strengthen research on the tolerance and carrying capacity of nature, communities and tourists” (Suðurland, 2018–2020). The Faroe Islands also highlight the need for more reliable knowledge and research on the effects of tourism, both to be able to strengthen the foundations of tourism as a key industry, and to be better able to offer more valuable and permanent jobs related to the sector. “Missing statistics and data limit our knowledge about the tourism sector ... For example, we do not know how many tourists enter the country and where they come from” (Ferðavinna í Føroyum, 2017).

The East Iceland region agrees with its neighbours in the north in its TDP. While there are no sufficient and regular measurements of progress, East Iceland says it is impossible to have an adequate understanding of how the visitor economy within the region is doing. “In general, we need to monitor visitor numbers, revenue and satisfaction. From this we will be able to gain market insights, and enhance our products, services, and destination to attract visitors, and [to develop] the kind of tourism that we want to have. ... This will also help us to understand where and what kind of effort is needed within our destination development.” The East Iceland TDP adds that the more detailed the information available is, the deeper the understanding of visitors’ travel values, social values and travel behaviours will become. Without proper knowledge and intense research in the tourist sector, there is no way of assessing what that sector is contributing to the region, and if it is developing according to plan (Austurland, 2018).

Collaboration on planning, managing, and developing a destination, as well as marketing cooperation between companies and sectors within a destination, and between neighbouring municipalities or destinations, therefore seems to be a priority on which all stakeholders should focus even more. Besides highlighting the need for broader collaboration, many of the regions also express concern about lack of proper research, access to data and other indicators to assess their development and to assist them further in developing themselves as a destination. Tools to evaluate performance also seem to be missing in some cases. One example of this comes from Northern Jutland (Denmark, ‘Common direction in Northern Jutland’s tourism’, 2018), where the lack of knowledge on satisfaction and motives for re-visits (returnees) is highlighted. Additionally, the TDP wants to explore novel data sources as an input to innovation, which is the aim of a project on ‘Small Destination Northern Jutland’ (focusing on the collection and analysis of data to target and innovate the destination’s tourism product (Aalborg, 2017-2020), in addition to attracting talent and research grants.

Several of the Danish TDPs note that while good Regional Tourism Satellite Account data exists for the Danish territory, there is an additional need for ‘softer’, more qualitative data, especially related to customer satisfaction. This is in order to provide feedback to tourism businesses; but also as a new means of engaging in participatory place branding and place development. For Greenland, where a (national) Tourism Satellite Account does not exist yet, but is being considered, the establishment of such a standardised statistical measure for tourism spending and the ‘tourism footprint’ in Greenland is a high priority. It would also allow for comparisons

with Iceland, for example, and thereby help establish a better knowledge base for political decision-making regarding the future of tourism development (Greenland, 2016–2020).

The expressed need for stronger evaluation performance as well as other data sources which can aid better understanding of local tourism development is something that further coordination across regional and national borders could contribute to. It is in fact in line with the Nordic Council of Ministers Nordic Tourism Policy, which states that "Evidence-based policymaking can be strengthened with effective collaboration regarding statistics, analysis and the exchange and development of best practices" (Nordic Council of Ministers, 2019).

Tourism in Faroe Islands has been on the rise in past years while authorities have promoted manageable growth and emphasised sustainable development.

Photo: Vaida Ražaitytė

5.3 Coordination and collaboration on marketing and destination branding

Considerable discussion is found in TDPs concerning the necessity of better cooperation among direct tourism stakeholders locally regarding marketing and destination branding. This is because individual promotion and marketing of individual companies is considered ineffective compared to the promotion of the destination as a whole. Increased coordination and collaboration are therefore quite often focused on the growth of the tourism sector within the TDP area, attracting more visitors and getting them to stay longer, or creating better experiences which will make tourists return. Additionally, several TDPs envisage greater involvement of tourists in co-creation, through social media postings, thereby encouraging participatory place branding and place development.

Two overall trends seem to be identifiable in the TDPs analysed regarding destination branding, and working together to achieve this aim. Some of the TDPs focus on collaboration among tourism actors, and often rely on digitalisation, big data or other 'smart' systems to collect feedback from tourists and make this available to tourism actors in the region. Another group of TDPs focus on participatory destination branding, thereby including not only tourists, but also local citizens in co-creating processes for destination branding.

Åland gets a fair share of visitors each year, mostly during the summer months but also in other seasons like their harvest festival in the fall.

Photo: Ágúst Bogason

An example of the first trend, which focuses more narrowly on the tourists and tourism actors in data and branding, together with the use of tourism data for better segmentation and improved visibility of relevant tourism products to potential and visiting tourists, comes from Skagen, Frederikshavn and Sæby (Denmark, 2015–2020) and Rogaland (Norway, 2013–2020). Other TDPs focus on the use of Big Data to understand tourism behaviour better. Examples come from both Region Midtjylland and Region Syddanmark (Denmark).

An example of the latter can also be seen in Northern Jutland (Denmark; Common direction in Northern Jutland's tourism, 2017–2020), where the vision is to involve visitors in co-creation "in order to inspire the guests to share their experiences with others, thereby ensuring that guests are maintained and engaged." Analysis of TDPs shows a growing trend towards participatory destination branding, in the sense that many of them mention as a goal the engagement of guests in marketing, for example through sharing of their experiences via social media (Bornholm 2017–2019, Denmark), and through recommendations or positive online feedback (Northern Jutland, Denmark). On the Baltic island of Bornholm (Denmark), more than three-quarters of tourists are returnees. Their positive posts, combined with the hosting of the Danish Political Festival *Folkemødet*, where many national politicians, decision-makers and media representatives participate and media coverage is massive,[1] as well as thematic media tours organised by Destination Bornholm (the local DMO), have strengthened Bornholm's brand and extended knowledge of Bornholm as a destination to new target groups. However, at the same time, local residents are highlighted as "our best ambassadors", through their hospitality towards visitors and pride in their island (Bornholm, 2017–2019).

Some TDPs go further and frame tourism development as part of local place development, as is the case with the 'Common tourism strategy for Vestlandet' (Norway, 2013–2020), for example. Or alternatively Midt-Troms Tourism strategy (2013–2017), which states that, "In short, development of tourism and the development of the local community are two sides of the same coin. A nice place to visit is a nice place to live!" Similarly, in Lejre (Denmark, 2018–2020), the tourism strategy is presented as a benefit to both "local people and visitors". Gribskov municipal tourism strategy (Denmark, 2016–2020) highlights the importance of holiday homes in both economic and branding terms. This is just a small selection of the many examples.

The lack of collaboration due to competition among neighbouring destinations, or among

businesses within a destination, is reflected in several TDPs. In the tourism strategy drawn up for the small municipality of Skagafjörður, in Iceland (Skagafjörður, 2017), for example, reference is made to a survey among tourism actors in the area. This states that: "...solidarity or cooperation with neighbouring municipalities is lacking because they do not recommend tourists to visit sites in neighbouring areas. It seems that everyone thinks of themselves [as being in] competition." So, it can be argued that internal competition for tourists visiting a destination is often so great that less focus is actually put on trying to attract more tourists to the region. Destinations and companies tend to try and get as large a share of the pie as possible, instead of working collectively to make the pie bigger. Therefore, lack of solidarity within the industry, especially when it comes to joint marketing, is considered a threat to the local tourism industry, according to Skagafjörður's tourism strategy. This says:

"It is important to strengthen the collaboration of companies in the region to strengthen its image. For the area to emerge as a unified destination, there needs to be more harmony in its marketing" (Skagafjörður, 2017). Such rhetoric is present in other TDPs as well, and it can be transferred to destinations or municipalities in the same region, to competing companies within a region, or even to different sectors and services that rely on the business of tourists. Similar views are expressed in other TDPs, pointing out that small actors with a small budget would in fact be better off in pooling their resources, being more strategic and working collectively to boost visitor numbers. Västervik's tourism strategy in Sweden, for example, faces up to the fact that they are incapable of reaching new markets by themselves. They say: "Västervik is too small as a destination, and has too little funding to manage to reach international target groups. Therefore, Västervik should be an active part of the destination cooperation in partnership Småland, and in Kalmar county's overseas marketing" (Västervik kommuns turismstrategi, 2013–2020).

Heterogeneity among tourism actors is highlighted as another reason for limited collaboration. An example comes from the tourism strategy for Ytre Namdal (Norway, 2013–2020), which points to the fact that the sector is actually characterised by a mix of "a handful professional tourism actors and several smaller businesses, in which tourism is a secondary or complementary activity. Limited collaboration and limited income make the sector appear fragmented and vulnerable. Despite an expressed willingness, collaboration regarding common goods like product development, quality, hosting, and market development is suboptimal."

Luckily, there are many examples demonstrating an appreciation of mutual benefit through collaboration between tourism actors, or even more widely between local actors *per se*. This approach encourages an understanding of neighbouring tourism actors as colleagues and collaborators, working towards a common goal of strengthening the destination brand, with the stated purpose of destination development being the common good of making "the cake bigger and securing more guests" for the destination. This is how it is expressed in the tourism strategy of Bornholm (Denmark, 2017–2019). Åland is also an example of a region that sees greater potential in combining resources when it comes to marketing itself as a destination. It says that, "The destination plan entails a major change in the strategic approach. There are great synergies in gathering all communication about Åland as an attractive place for visitors, residents, establishments and suppliers of export products. ...To get more Åland companies and actors as partners in marketing campaigns would contribute to the strengthening of the Åland brand" (Åland turismstrategi, 2012–2022).

In Gotland, collaboration is also repeatedly mentioned as a foundation for sustainable destination development, while cooperation and coordination between different actors is also said to be crucial for growth and marketing purposes. "A crucial strategy for growth is to coordinate and increase the accuracy of marketing efforts, and to ensure [their] distribution" (Region Gotland, 2017–2027).

5.4 Summing up

Collaboration is an issue of great importance in creating a better-functioning tourism destination, to the benefit of all. This means collaboration and coordination at different scales and with different scopes: 1) Among tourism actors, locally (within the TDP territory); 2) between levels (from tourism actors within the TDP area, up to higher administrative levels, whether at destination, regional or national (or sometimes even international) level; and 3) across sectors or fields – i.e. extending the collaboration from involving only the main tourism actors (typically private sector businesses, DMOs and government organisations) to also involving private businesses in other sectors, or civil society organisations, or groups of engaged citizens, with the goal of broadening the benefits that rural tourism can generate. Additionally, TDPs devote quite some space to discussing two additional elements. The first is (the need for) collaboration and coordination for the improvement of data, and data-based innovation and improvement within the tourism product. The second is the need for collaboration and coordination regarding destination branding and marketing. Here, some focus on digital solutions, while other TDPs distinctively, approach this in a more relational way, aiming to (also) involve guests and residents (and 'leisure time residents') in participatory place branding. As a result of the broad and multi-faceted character of tourism, including its seasonality and the heterogenous size of the economic actors involved, collaboration and coordination is often a challenge.

6. Thematic analysis: Other pressing issues and concerns in the TDPs

The TDPs analysed in this report reflect the many different challenges perceived by tourism actors, local authorities, and sometimes the view of local residents, too. Interestingly, some of the themes which have a strong presence in recent academic and media debates about tourism development (and the intersection with regional development) are practically omitted by the TDPs. This chapter tries to cover a small handful of issues and concerns present in the TDPs and the wider debate. That includes challenges related to the seasonal character of many tourism activities, especially in the rural Nordic regions (6.1), and other challenges related to infrastructure needs and the attraction of investment and capital (6.2). A whole range of concerns connected to regional (or local) development perspectives on tourism, and how these are reflected in (some) TDPs (6.3) are also featured. Environmental concerns are given a sub-chapter to themselves (6.4).

6.1 Seasonality

Seasonality, and imbalanced seasonal distribution of visitors throughout the year, is one of the key challenges presented by TDPs from the Nordic rural regions. The imbalance caused by seasonality can hit regions differently. However, despite the fact that the consequences can vary between regions, this is still an issue which can be defined as a common Nordic challenge. More than two-thirds of all TDPs make some mention of seasonality issues, while individual countries and regions discuss this concern and extending the tourism season in more detail than others. The Nordic regions might be at different stages in their development as tourist destinations, relying on different seasons and being dependent on tourism for their regional and local economies in different ways. But the seasonality challenge, at its core, is nonetheless often very similar. A short sentence in the TDP from Region Norrbotten in Sweden (2017) sums up what is often the main challenge for rural tourism: "...the summer months stand out as special in that some companies basically have their entire turnover for one or two months."

Extending the season, because it is so short, is a focal point in almost all of the tourism strategies analysed in this research. Seasonality discussions feature in all the TDPs from Iceland. In the great majority of the Norwegian strategies the goal of developing year-round sustainable tourism is commonly presented as a core assignment. The TDPs from Finland also highlight year-round tourism, as do more than half of the Danish and Swedish ones. In the tourism plans of Greenland, Åland and the Faroe Islands, seasonality is likewise considered one of the main challenges tourism is facing. For example, the Faroe Islands have selected the extension of the tourism season and year-round tourism on all islands as one of their four cornerstones in tourism development until 2025.

When taking a closer look at why tackling seasonality is prioritised, it is soon evident that most regions see seasonality as pivotal to the development of sustainable communities, and season extension as holding an important potential for contributing to substantial economic growth from tourism. Although the issue of seasonality is not necessarily formulated in this way in all TDPs, looking at the reasoning that lies behind the felt need to address seasonality almost brings up the same key issues. Seasonality is a key element in an intricate combination of factors and can affect different issues linked to regional development, destination development, business competitiveness and innovation, employment and competence-building, spreading visitors throughout the area and over the year to avoid overcrowding, and helping to build economic, social and environmental sustainability (Árnadóttir, 2019). Successfully extending tourist seasons, and in that way tackling some of the problems often associated with seasonality, therefore remains among the core issues in the development of tourism in northern areas, especially peripheral regions—since seasonality has much less effect on larger urban areas (Rantala *et al.*, 2019).

The Danish beaches attract locals during summer months but also foreign visitors from neighbouring countries like Norway, Sweden, and Germany.

Photo: Ágúst Bogason

6.1.1 Seasonality and employment

Extending the tourism season is in many ways about creating more balance. Seasonality is, for example, problematised when the societies and environments that host a tourist destination encounter the pressure of a 'high season'. Peak seasons can put enormous pressure on the total infrastructure and environment of a region, with massive inward migration of visitors and people working in tourism during the peak season. This is a theme that can be identified across different regions right across the Nordic countries. Some TDPs also acknowledge the problem of outward migration at the end of a peak season, together with the closing down of facilities and the interruption of services.

The lack of balance that this seasonality causes is therefore challenging various elements that form part of local tourism development. As described earlier, the main formulated goal from tourism development is the growth of the sector to serve as an economic resource in peripheral and rural regions (ones which otherwise have limited resources). This is mainly achieved through investment and job creation. However, where seasonality is pronounced, tourism employment is often only temporary, contrasting with the desire of many remote and rural areas for stable, long-term, year-round jobs which can sustain their population economically. Seasonality also has a negative impact on the image of tourism work, which is often viewed as precarious and low-skilled. When valuable long-term jobs cannot be offered through tourism, the work attracts transient seasonal workers who may not have any commitment to the place and have no intention of staying permanently. The longer-term benefits of tourism for the host community and the regional economy may thus be undermined (Rantala *et al.*, 2019).

These facts are acknowledged in a number of TDPs when discussing the issue of seasonality. The joint tourism strategy of Vestlandet, in Norway, says: "Parts of the tourism industry in the districts of Western Norway struggled with pay, due to the short season and too few income-generating months to cover the fixed costs. Short seasons, low attractiveness and low wages linked to the industry attract a type of workforce that does not always contribute enough to strengthen the local community in the long run" (2013–2020). However, others point out that tourism can have many positive effects for the local community, besides just providing jobs and income, while also driving further competence development. "Tourism can often deliver benefits where other industries cannot, particularly in more remote rural communities. Tourism can keep remote communities alive and prosperous, can provide facilities that might not be sustainable by the population of the local community alone, and can help drive the demand for skills development – leading to higher paid jobs, as well as injecting fresh spirit into local cultural and artistic life," it says in the TDP from East Iceland (2018–2021). This then continues to reflect on

the subject of seasonality by adding: "By developing year-round tourism, we can keep services open and have more staff working within tourism permanently. This would also mean that we can attract more people to move to Austurland, since we would be able to offer more full-time job opportunities within tourism." Similar expectations are expressed in Finnish TDPs, for example in the tourism strategy of Etelä-Karjalan (2015–2020); and in the Danish TDPs, such as the joint TDP for Skagen, Frederikshavn & Sæby (2015–2020), and Kerteminde TDP (2015–2025).

One of the key arguments for the usefulness of tourism as a regional development tool is the potential to create valuable employment for the locals, or even to attract new people. Seasonality is, however, a major hurdle in being able to offer valuable and permanent work within tourism. Similarly, overcoming the limits of seasonality and extending the tourism season is seen as providing great opportunities. General optimism can be detected in the belief that, if tourism seasons can be made longer at both ends, valuable and innovative job opportunities related to the tourism industry will emerge in the more sparsely populated regions of the Nordic countries. "When considering tourism entrepreneurship, the involvement and inclusion of young people is key. The industry needs 'new blood', young players and new perspectives. In this development work, local educational institutions are key players and important partner," says the TDP from Haminan in Finland (2015–2020), further underlining the fact that seasonality affects almost all tourism development in the more rural regions, in this case education and competence building.

Mývatnssveit in Northeast Iceland is a major attraction during the summer months while there are few visitors during the darker months.

Photo: Ágúst Bogason

6.1.2 Distribution of tourism in time and space

One measure to tackle seasonality that is commonly mentioned is securing a better spread and distribution of tourists over both time and space, in terms of when they visit and what parts of the area they visit. Many regions that are already popular destinations aim for a more even spread to reduce the pressure during peak seasons. This issue is directly connected to discussions about carrying capacity. Overcrowding at specific places in peak seasons can put enormous pressure on delicate nature sites, as well as affecting the social tolerance of locals and the tourists themselves. At the same time, lesser-known nearby destinations which often have comparable or similar experiences to offer, may have very few visitors. Efforts to attract new tourism user groups, and ensuring that they are more evenly distributed throughout the year and the area, are factors interlinked with the discussion on cooperation and collaboration towards better destination development.

"In terms of tourism policy, the distribution of tourists needs to be examined. There is a lack of numerical data and research on tourism. There is a need for more comprehensive development of

tourist attractions, and a better understanding of the sector within government," it says in the TDP from the South Iceland region (Suðurland, 2018–2020). This quote again illustrates clearly how interrelated the different issues involved in tourism are, since seasonality is commonly related to better coordination and cooperation. Better collaboration is, in turn, often identified as the key prerequisite for more efficient marketing, which needs to be based on more research, data collection and analyses (see Chapter 5).

The Swedish island of Gotland is an example of a popular tourist destination which aims to attract additional tourists outside the existing peak (summer) season. During late June and July, the island tends to be full of visitors from other parts of Sweden, with many seeking out the same things to see and do., Attracting new visitors and enabling them to visit outside the domestic high season is therefore a key goal. "An important challenge is to increase the proportion of foreign guests, and to try to direct them primarily to August–October, but also to spring and early summer. A further challenge in relation to the current situation is to attract guests to visit 'the whole island'", the TDP from Gotland (2017–2027) says, citing this as necessary for making the tourism season longer, for increased profitability of the sector, and to relieve pressure on infrastructure and the environment. Similar arguments are found in TDPs from all of the Nordic countries.

Most TDPs express the will to develop year-round tourism, but remain realistic and focus on lengthening the existing season at both ends – as, for example, Holstebro in Denmark does. The municipality states that, "The season needs to be extended so that tourists come all year round, but with increased focus on strengthening the shoulder seasons of spring and autumn" (Holstebro, 2013). Then there are others who discuss the need for new tourism seasons outside the usual busy months, either by focusing on fresh products or targeting special groups (i.e. the Icelandic TDPs, Etelä-Karjalan from Finland, and Skagen, Frederikshavn and Sæby TDPs). In regions like Dalarna in Sweden (Dalarna, 2018–2030) and Lapland in Finland (Lapin, 2015–2018), winter tourism is quite prominent, with skiing and other 'winter experiences' often being the main selling points. Such regions frequently put forward aims in their TDPs to do with not only extending those seasons, but also creating new ones outside the busiest months, in order to make the tourism sector more balanced.

6.2 Infrastructure and investment

Sufficient infrastructure needs to be in place for a destination to be able to receive and accommodate a certain number of visitors. This can include a wide variety of different elements, from water supply and waste management, housing and food supply, and access to electricity, through to connections to the road system and other transport structures.

"By establishing Trollfjell geopark (collaboration between municipalities in the north of the county in the north of Trøndelag), there is a clearer need to connect the counties more closely," Ytre Namdal Norway) writes in its tourism strategy (2013). It seeks further cooperation on destination development planning and spatial connectivity. This tourism strategy therefore highlights the importance of transport connections between the municipalities involved, but more importantly to larger areas which have direct connections to ports and the main road system. It says that "...this will provide an advantage for Ytre Namdal through closer association with the national main road system and the Vega World Heritage Area. The region would in this way benefit greatly in terms of shorter route for customer groups in Eastern Norway and abroad" (Ytre Namdal, 2013–2020).

The example from Ytre Namdal is just one of many that highlights accessibility and better transport possibilities as a main challenge in expanding tourism activities, securing better distribution of tourists, and tackling seasonality. "A trip to Dalarna is comparable to a trip to the Mediterranean. If it is not easy to get to Dalarna and to travel between places and experiences in Dalarna, we risk not being chosen as a destination. The tolerance for waiting, and ineffective communications that take time away from the [tourism] experiences themselves, is low," the tourism strategy in Dalarna Sweden states (Dalarna, 2018–2030). Other regions have similar stories to tell. "A short tourist season affects the tourism industry in the West Fjords, including the distribution of tourists around the country, difficult transportation in some areas, and the lack of services and entertainment available," the TDP from West Fjords in Iceland asserts (Vestfirðir, 2018–2020).

Necessary infrastructure to accommodate visitors and to ensure that they have good access to the requisite destinations is understandably a key concern among many regions and municipalities. Such investments are, however, very expensive. The authorities responsible for building the infrastructure necessary for whole-year tourism, whether national, regional, or municipal, are understandably reluctant to make such investments if peak season is only a few weeks (or a couple of months) each year. The same goes for private investors, who would otherwise want to provide, for example, housing and services. When the likelihood of a shutdown is high during most of the year, and the profitability outside of peak season is low, investment is not very feasible.

Seasonality and lack of sufficient infrastructure can therefore create a 'Catch 22 situation', whereby the available infrastructure is too limited for further growth during the peak season, while (on account of limited infrastructure) it is not viable to expand the tourism to be a year-round activity. That is why more and better distribution of tourists, both over time and space, is considered a key element for the tourism sector to be able to grow (Rantala *et al.*, 2019). Running tourism at current capacity over longer periods could contribute to more permanent employment and economic growth—all without putting additional pressure on the environment, on infrastructure and on the social tolerance of local communities and visitors. Addressing seasonality is therefore seen as the solution to many challenges that the rural tourism sector in Nordic countries is facing.

6.3 Regional development perspectives in tourism planning

Rural tourism is generally met with high expectations about being an engine for local and regional growth and job creation, in contexts where other employment opportunities are often shrinking. These expectations include direct job creation in tourism, as well as the indirect (positive) economic effects of tourism in other sectors. For example, a recent strategy for coastal tourism in Denmark (Dansk Kyst- og Naturturisme, 2015) highlights the value-chain character of tourism as a sector, and shows that tourist consumption can be widely distributed across a range of products, including those outside of the immediate tourism market. This multiplier effect that increased tourism activity can trigger is mentioned regularly in the TDPs, usually connected to discussions about positive rural development—local benefits and added value in other sectors. These benefits are, however, as discussed in earlier chapters, mainly considered to be economic.⁸

Some countries, especially where Regional Tourism Satellite Accounts are well developed, seem to have a good idea what the tourism industry actually brings to a regional economy. Some TDPs therefore offer detailed calculations about, and estimates of, the economic value of tourists for local economies. This applies to a proportion of the TDPs from Finland and Denmark. "In general, these calculations aim to assess effects using both the income method (turnover of companies from tourists) and the expenditure method (by mapping the use of tourists' money in an area). In addition, key concepts include direct effects (money spent by tourists in the area), indirect effects (acquisitions of companies in the area from other companies), and derived effects (use of money by employees in the work area). The industries that are taken into account in terms of revenue impact are accommodation and food service activities, transport, service station activities, retail trade and recreation and other services." This is how the TDP from Pyhäjõe (2014–2020) lays out the situation, before putting forward its estimate of income from tourism. Meanwhile, the TDP from Hanko in Finland (2012–2020) states that, "Tourism also has a multiplier effect on other industries, such as the construction industry and the food industry, with an estimated *value added* of €1 in the tourism industry, bringing 56 cents of value-added to other industries."

Detailed calculations and estimates about the economic effects of tourism present in some TDPs are understandably used to argue for the local or regional importance of more touristic growth. "Tourism also employs tourism service providers and trade staff. Indirect jobs are created in, among other things, property maintenance, marketing, media, transportation and

8. Overall, 89% of TDPs in Norway and 86% in Iceland address, to some extent, the importance adding value in other sectors than those directly involved with tourism when planning for their destinations. In Finland, 55% address this while just over half in Denmark and Sweden bring the topic up.

construction," says the TDP from Karjalan in Finland (2015–2020). Their fellow Finns in Pohjanmaan (2014–2020) add: "Tourism increases additional demand for other services and thus enables the production of more diverse and high-quality services for local residents also." Tourism is therefore seen as having a great multiplying effect on other industries and benefit regional development issues in various ways. "The main goal of the strategy is to focus development activities on tourism centres and thereby spread the regional impact to the entire region," the TDP from Kainuun (2011–2020) says. Pohjois-Pohjanmaalla (2014–2020) also highlights the regional development effects, by adding that: "... the tourism industry is a tool for regional development, the development of which generates regional economic benefits in Northern Ostrobothnia."⁹

This is something that is mentioned throughout the Icelandic TDPs while some discussions are present in Norway and the Faroe Islands problematising this as possible 'economic leakage', often linked to cruise tourism, and scepticism about local economic benefits in ports of call. "The value creation from cruise traffic has been much discussed [...]. Many think that there should be restrictions on cruise traffic, and that the cruise industry must pay for the use of common goods on a par with other types of tourism" (Cruisestrategi for Vestlandsregionen, 2016–2020). Some TDPs discuss (potential) positive as well as negative effects of tourism on local communities. However, they do not seem to attempt to quantify the negative ones.

The variable about 'secure local benefits' demonstrates a considerable degree of variation between the Nordic countries, with the sub-national TDPs from Denmark and Norway (and the national ones from Faroe Islands and Greenland) paying much attention to this aspect of tourism development (see section 3.3). Several TDPs explicitly strategise attraction, by appealing for people to move to a (rural) area via tourism activity, both as tourism actors (for example, newcomers or returnees establishing gastro-tourism ventures or other rural tourism companies) (Buskerud, Norway, 2016), or as guests who enjoy the area so much that they decide to move there permanently (Faaborg og Midtfyns erhvervs- og turismestrategi 2013–2018; Langeland 2016–2021, Lejre, 2018–2020), or holiday home owners who visit more often and end up staying permanently (Gribskov, 2016–2020; Skive, 2015–2018). Other avenues through which some TDPs try to ensure that tourism brings benefits to the local community or region focuses on business and conference tourism, combined with local networks and coordination. This is about trying to identify and attract qualified people and much-needed skills (Midtjylland Regional Turismehandlingsplan, 2016–2020), as well as identifying and attracting the necessary venture capital for (tourism) related investment in the area (e.g. Midt-Troms, 2013–2017; Aalborg, 2017–2020; Midtjylland, 2016–2020).

Other ways of securing local benefits from tourism involve, for example, physical infrastructure planning and investment that aims to create a synergy between tourist development and the improvement of the quality of life for a resident population (Bærekraftig Telemark 2016–2020; Lejre, 2018–2020, Lærdal, 2011–2015). Or municipal authorities or DMOs who pay attention to the fact that a well-functioning tourism sector can help provide the basis for a renewed cultural life in a rural region; one that the resident population alone would not be able to sustain. It thereby increases the attractiveness of the area for both residents and visitors, and also strengthens a sense of local identity (Midtjylland Regional Turismehandlingsplan 2016–2020, Gribskov Turismestrategi 2016, Aalborg 2017–2020, Finnmark Regional planstrategi 2016–2019; Skagen-Frederikshavn-Sæby, 2015–2020). Some TDPs also highlight important health benefits for the local population from outdoor recreational investments, targeting both the local population and tourists (e.g. Felles reiselivsstrategi for Vestlandet, 2013–2020).

9. However, while some present calculated estimates of economic value from tourism on other sectors, others seem to take it for granted, and still others are calling for better data on the subject (see Chapter 5, and the recent Nordregio Report on Regional Tourism Satellite Accounts in the Nordic Countries).

The harbour in Hirsthals, Denmark, is home to both small fishing boats and larger cruise liners that travel to Norway, Faroe Islands and Iceland.

Photo: Ágúst Bogason

6.3.1 Authenticity

The concept of 'authenticity' is a recurring theme in many of the Nordic TDPs. At the same time as regions wish to prolong their tourism seasons, provide more valuable year-round jobs, upskill tourism employees, grow economically, and build up tourism sites to accommodate more visitors, they are still concerned with the authenticity of their environments and communities – both in the sense of preserving their own culture, and in the eyes of the visitors. This can be a dilemma.

These passages in tourism strategies are very diverse, and span different topics related to the place-specific qualities of a destination. Using local customs, local strengths and local culture in innovative ways is something widely discussed in many of these tourism strategies. They are seen as ways to access new markets, provide unique experiences, and prolong the regular peak season for tourists. Gastro-tourism is a prime example of one way to explore new markets and develop local tourism with authenticity in mind (Regional plan for oplevelsesnæringerne i Hedmark, 2012-2019; Reiselivsplan for Sogn- og Fjordane 2012-2025; Varde, 2013-2018; Bornholm, 2017-2019, Lolland-Falster Fødevarestrategi 2018-2020). But there are many other ways that authenticity can play a role in developing Nordic rural tourism, and discussions on authenticity take on different forms in our TDPs. Most prominent are local traditions and cultures, along with attributes of the physical and natural environment.

In Gribskov municipality, in Denmark, the tourism strategy (2016) says that: "...tourism has potential for further growth. We must create quality growth based on the local potential of the municipality and improve life for local residents, the leisure residents, tourists and business in general" while in Norway, Telemarks Fylkekommune TDP (2011-2024) says that, "good access to, and use of, the cultural and natural landscape can strengthen people's sense of belonging to the local community, as well as provide positive experiences."

Some regions have experimented in providing 'authentic' experiences, and in that way meeting the demand that has surfaced in the last few years for different kinds of tourist experiences. These new forms of tourism often revolve around being outside the mainstream, with fewer people about, a greater sense of calmness, and visitors enjoying greater opportunities to 'experience being a local' – rather than being a traditional guest (Broegaard, Larsen & Larsen, 2018). This kind of tourism is also often associated with wanting to be close to nature; appreciating what is unspoiled, while also enjoying local foods and experiencing local traditions, events, and culture. Many regions across the Nordic countries have cultivated these new forms of

tourism, and have also tried to utilise them to counterbalance the seasonality of the more traditional nature-based tourism.

"Cultural tourism can be seen as the engine in relation to the development of year-round tourism and attraction development," the TDP from Helsingør in Denmark says (2016-2020). The tourism strategy of Åland takes a similar tone, marketing events and happenings outside the regular high season. "The events in Åland have an important role to play in tourism development. They are also important products in themselves, which have great potential for filling available capacity throughout the year. Events additionally have a market value, because they create media attention and editorial coverage of Åland" (Åland, 2012-2020). Several of the TDPs who promote events and cultural happenings include close collaboration with local volunteers and organisations as part of this (e.g. Gribskov Kommune 2016; Lolland, 2017-2027; Lejre, 2018-2020).

The creation of new events and activities, along with better marketing of existing ones, is now commonly used as a way to contribute to the better distribution of tourists over time, and to attract new user groups. "...There are common issues that we need to work on, such as seasonal extension, for example by developing and profiling more activities and events during the winter," Värmlands tourism strategy declares, while also trying to target new user groups such as businesses and conventions. "Building better meeting facilities, creating new activities and good dining experiences, forms a good basis for our opportunity to receive many visitors from different target groups all year round" (Värmlands besöksnäring, 2014-2020).

6.3.2 Gastro tourism and other ways of securing added value in the local area

Gastrotourism, also sometimes called 'culinary tourism', is also something that Nordic regions seem to be increasingly embracing, according to discussions on this in a number of tourism strategies. It is, of course, just another way to reach out to new markets and user groups, as discussed in the previous chapter. But gastro-tourism has nonetheless developed as a unique form of tourism. It is also often connected to the quest for purity, the unspoiled and the local, which is something that tourists generally connect to in the Nordic countries (Gyimóthy, 2017; Simonsen, 2019). Gastro-tourism, which can also simply be called food tourism, since it has the exploration of food as one of its main purposes, is mentioned in some form in the majority of TDPs analysed in this research. This form of tourism is growing and adds significant value in other sectors not directly related to tourism—another theme that recurs in Nordic rural tourism strategies.

"Experiences related to food in Agder are represented through farms and delicatessens, dining and restaurants that focus on the authentic, which is based on locally-produced ingredients and personal hosts. Agder's food traditions have potential in a visitor perspective," the tourism strategy of Agder Norway (Agder, 2015–2030) says. Similar statements can be found across the Nordic TDPs. Since gastro-tourism is the pursuit of authentic, memorable culinary experiences while travelling (ones that often involve observation, cultural and regional illumination, and hands-on participation), it is considered to have positive effects on different sectors (Williams *et al.*, 2013). Different food producers – for example breweries, farms and fisheries in the Nordics – are increasingly offering direct participation. Since another element of these gastronomic experiences is based on locally, and often ecologically, produced food, they can also make a substantial contribution to local sustainability – economically, environmentally and socially.

"Gastrotourism is based on local food production and nature, and can attract Danish and international tourists with a special interest in nature and high-quality food. These tourists value the good life and meals based on unique ingredients with a special taste, history, and local origin. ...These culinary experiences are linked to other local food events, and not least cultural-historical themes, so we can offer coherent experiences," the Danish Faaborg- og Midtfyn tourism strategy (2013–2018) says concerning its gastro-tourism initiatives. The same document, as well as other TDPs, illustrates how many destinations are actively engaging this form of tourism, and are even including food networks and food industry clusters in destination development.

The inclusion of local food production networks in destination development is one of the innovative opportunities identified by some Nordic regions in their efforts to expand the tourism sector, while also overcoming the challenge of seasonality. Promoting gastro-tourism also adds value by increasing other forms of tourism and helping introduce more sustainable practices.

The people who make up the user group for gastro-tourism also usually spend a considerable amount of money. They enjoy cultural events and other things to see and do locally on their travels, and they are therefore valued customers. This is a user group which goes by different names, but is always valued. In the TDP from Hanko, in Finland (2012–2020), this particular tourist type is identified as one of the target group that needs to be focused on. There they are called 'the urban Bohemians'. "The 'Bourgeois Bohème' is a target group consisting of people who enjoy the arts as well as diving, enjoy aesthetically pleasing surroundings, and love to eat and read books in a hammock."

Finland's Southwest Tourism strategy also sees great potential in targeting gastro-tourists, and in establishing itself further as a region with a rich food culture. This bit from their tourism plan sums up in an illustrative way the possibilities and positive effects a locally food-based tourism experience can offer, with its focus on skills, local products, cooperation and sustainability.

"Due to its favourable cultivational conditions, Southwest Finland has always been a Finnish food barn. The geographical location has instilled in the region a distinctive food culture in which the best elements of both Western and Eastern influence have been incorporated. Local food thinking, logistical competitive advantage, delicacies based on the seasons, know-how based on high-level education in the field, innovative product development, and cooperation between various actors all guarantee the province a unique opportunity to become a renowned (and *internationally* renowned) gastronomic destination" (Varsinais Suomen, 2013–2020).

6.4 Environmental concerns

An overall theme for the Nordic rural regions, and how they define themselves in their TDPs, is that more than two-thirds talk extensively about themselves as nature tourism destinations. All the Icelandic TDPs mention nature as the main attraction, while 95% of the Norwegian and 73% of the Finnish ones do the same. In Sweden and Denmark more than half of TDPs mention nature-oriented tourism, and nature attractions are also highlighted in the national tourism plans of Åland, the Faroe Islands and Greenland. In the overall coded material in our research analyses, the third most common code was 'nature-oriented tourism' which covers 7.1% of the total codes in the research, while 'nature protection and reserves' covers 5.3%, achieving a combined overall figure of 12.4%.

In addition to that, variables like 'sustainability concerns' can be directly related to environmental concerns, a challenge which is well discussed in Nordic tourism, as well as the academic literature on tourism. Overall, TDPs tend not to discuss in any detail topics that are commonly presented as challenges or reasons for dispute in the literature and research on tourism. Issues like 'cruise tourism' and 'the right to roam' are often associated with disagreements in tourism development, and TDPs were coded for those variables as well as 'avoiding negative effects of tourism' and 'experienced negative effects of tourism'. In a Nordic context, especially, these topics are often related to environmental concerns. Only 17.3% of TDPs make some mention of avoiding negative impacts, while 9% include discussion of the experience of negative impacts of tourism. The right to roam is then mentioned in 28% of TDPs, while 23.5% have passages about cruise tourism (see Chart 3.1). When looking at the proportion of overall codes in all the TDPs, these four variables are all among those which are represented the fewest times, with cruise tourism being 2.2% of coded material to experiencing negative impacts only covering 0.7% of the total codes (see Chart 3.3).

How discussion about environmental concerns is presented in the different TDPs is quite varied. There are, of course, national and regional differences as well as similarities and dissimilarities in the different ways Nordic regions utilise nature in developing themselves as tourist destinations, and which user groups they are trying to reach. Nonetheless, it can be stated confidently that Nordic rural areas view nature and their natural environment as their main appeal. It is therefore quite surprising that discussion about protecting this 'most valuable asset' is not more prominent in the TDPs, especially when the main benefits of increased tourism are considered to be economic growth. However, issues of environmental concern tend to be more prominent in regions where tourism is considerable, and understandably so. The more tourism, the more the

effects on natural environments, social tolerance of locals and physical infrastructure. In these regions the local economy is also considerably more dependent upon the contribution of tourism. In some TDPs, the natural environment tends, maybe unintentionally, to be discussed more as a resource or as a commodity, something that is valued for its economic revenue potential across these regions. In that way, it can be considered that tourism-dependent regions are more protective of their 'assets' as sources of income.

Iceland has, over the past decade, experienced an enormous increase in tourist numbers in places where the main attractions are nature sites (Sæþórsdóttir, Hall & Wendt, 2020). This has led to discussion and concern about overcrowding in certain hotspots, especially in the southern region a few hours from the capital area, where most tourists enter the country and stay during their visit (Suðurland, 2018–2020). Icelandic TDPs all address the need for protecting delicate natural sites, together with the need for proper zoning, management and monitoring of these attractions, especially the ones which are under great strain. In Iceland, TDPs also commonly discuss the need for government to secure further appropriate infrastructure and facilities. This is seen to be necessary in order to be able to carry a certain number of visitors at the most popular sites and to continue to grow (Suðurland, 2018–2020; Reykjanes 2018–2021). Some concerns are also raised about the increased numbers of tourists, and how they affect the tourist experience overall. The TDP for the East-Icelandic region mentions that building too many facilities to accommodate a large number of visitors at a nature site can cause the experience to be 'un-authentic'. That is, a tourist who is seeking unspoiled nature, preferably with few visitors, instead finds an over-crowded mass tourism site. Providing infrastructure to be able to carry more and more visitors can, in the end, ruin the very thing the visitor came to experience (Austurland, 2018–2021).

The Faroe Islands' tourism strategy takes cues from the experience of its Icelandic neighbours, and is in many ways unique in the way that it is proactive with its vision for combining tourism development and environmental protection. Great emphasis is placed on responsible tourism and sustainability. Special concerns are addressed in the Faroese TDP with regard to the right to roam, which can have considerable negative effects on the natural environment. This, along with large groups of visitors being brought to often vulnerable areas from cruise ships, citing the right to roam, is considered a challenge, and something that causes environmental concern (Ferðavinna í Føroyum, 2017).

Environmental concerns are not only related to the natural environment and to nature itself in the TDPs of the Nordic regions, however. When certain destinations are at full capacity, concern over broader environmental factors is addressed in some of these TDPs. The Islands of Öland and Gotland in Sweden, for example, can experience an overload on the electricity grid and water shortages during their busiest seasons, while the expected growth in some regions is simply said to be impossible to sustain into the future. The Norwegian Cruise strategy for Vestlandsregionen (2016–2020), for example, notes: "If cruise traffic develops in accordance with forecasts, the Westland region faces major challenges with the reception capacity and infrastructure it currently has, and in relation to being able to facilitate the sustainable development of traffic."

Although some environmental concerns are clearly presented in the TDPs, quite a few of the regions also see great opportunities, and view tourism development in a purely positive way. In the TDP from Etelä-Karjala in Finland (2015–2020), for example, it is argued that with organised management it has been possible simultaneously to maintain national landscapes while promoting cultural tourism concepts and activities. The plan for the World Heritage site in Suomenlinna (2015) also suggests that "tourism activities can support the preservation of Suomenlinna's culture and natural values, and also raise awareness of the site's world heritage status". The Kvarken World Heritage Site (2011) embodies similar views, and says that tourism within the area "is focused on improving the quality of the tourist services, the visibility of world heritage values, and respect for the locality".

Þingvellir national park in southern Iceland attracts great numbers of tourists each year.

Photo: Ágúst Bogason

While some areas are concerned about the effects of tourism developments and the impact tourism has on nature and the environment as a whole, others see nature reserves, tourism growth and environmental protection as capable of going hand-in-hand. Tourism is even seen by some as an opportunity to promote sustainable development. While the key word when presenting these views is always 'management', and this is always said to be essential for achieving that goal.

"National parks, protected areas and other sensitive environments with a large number of visitors can become role models for sustainable, sparsely populated development, through the creation of growth, improvement of the environment and biodiversity, and support for living communities. Coordinated management and governance are needed to create sustainable development and growth in sparsely populated areas" (Kiruna, Lapland, 2015–2020).

Coordinated management to oversee and monitor natural environments is not always an option in less populated regions, however. These are places where tourist numbers are relatively low compared to the most visited sites. Management and monitoring require structure, dedication and financial investment. For less populated regions covering larger geographical areas, management in itself can be a significant challenge.

6.5 Summing up

The challenges presented in the TDPs from rural areas in the Nordic region are diverse, but in many instances they may also be considered to be opportunities. Seasonality, for example, is a central and common Nordic challenge when it comes to tourist development. It is also related to, and part of, many other challenges. But at the same time, extending the tourist high seasons, creating new seasons, and therefore making tourism less seasonal overall is seen as a chance both to grow and to enable diversification of employment.

Seasonality is also related to the challenge of securing a better distribution of tourists over the year and the area. While the majority of TDPs express the will to extend their tourist season, others also address the need for joining forces in creating 'functional tourism regions' or for creating a destination that is brought together from many smaller units, contributing to a more even distribution of visitors. In that way, seasonality can also be connected to environmental concerns, especially concerns over natural sites that tend to get overcrowded during a few weeks over summer. It should be noted that some regions tend to discuss environmental concerns and

protection as 'protection of economic possibilities', while others present ways to create reservations – that is, to promote tourism growth while contributing to sustainable development.

The regional potential for tourist development are much more prominent in some TDPs than in others. In Denmark and Norway, they discuss how to achieve creative synergies between tourism development and regional development, or how to ensure that any tourism development also becomes an asset for the local population. This relates to building infrastructure and/or organising activities that are attractive to use or attend for both guests and local people; to attracting guests to move (permanently, or temporarily during their leisure time) to the area; to attracting venture willing capital; to being a magnet for a skilled workforce; and to the strengthening of local identity and the attractiveness of special places. It also relates to collaboration between tourism and other sectors of the economy – for example between restaurants and local food producers as part of the gastro-tourism trend.

7. Sustainability concerns

Sustainable development is without a doubt one of the key issues of the day, both in the political sphere and for the general public. Sustainable development in its widest form must consider environmental, social and economic effects together (UN, 2015), and substantial work is being done to implement the UN Sustainable Development Goals (SDGs) across all layers of governance. Businesses are also feeling the need and pressure to do the same (OECD, 2020; Gassen, Penje & Slåtmo, 2018). The academic literature abounds with analyses of sustainability within tourism development, and the challenges and solutions pertaining to a possible transformation of the existing tourism system (see for example Hall, 2019; Manniche *et al.*, 2019). While cultural sustainability is becoming an increasingly more important issue for the tourism sector in regions and communities across the Nordics, environmental integrity and the natural environment are to a greater extent seen as assets for the attractiveness of particular destinations and for regional destination branding, as well as for the overall economic viability of communities and regions (Øian *et al.*, 2018). Sustainability is therefore highlighted as a central concern in Nordic regional tourism development, and this is also the case in the national tourism policies of the Nordic countries themselves (Nordic Council of Ministers, 2019).

Accordingly, sustainability is seen as an important part of the tourism development in large parts of the Nordic rural regions, at least on paper. In much of the material for this study, 'sustainability' and the sustainable development of the tourism industry is said to be the focal point of the future development for tourist destinations. Some tourism policies even state it as the point of departure, the light that guides the way in everything that tourism involves. A growing public awareness of the need to transition to more sustainable practices, increased public pressure, along with political statements and commitments to do so, means that we should expect to find sustainability concerns and the SDGs strongly reflected in sub-national plans for tourism development, too.

Similarly, based on the frequency of the presence of the word 'sustainability' or 'sustainable' in TPDs, it could be argued that sustainability concerns are important issues in regional Nordic tourism development. This is the fourth most-coded variable in the material (see Chart 3.3). However, a quantification or a simple word count does not reflect *how* 'sustainability' is presented in destination management planning. Sustainability has in many ways become a buzzword that is used with a variety of meanings, in the tourism industry too. Despite this, and given the general acceptance of the need for transition towards more sustainable development in societies at large, and within the tourism sector, it was surprising for the team to register TDPs that do not even mention sustainability. Other regional tourism development strategies mention sustainable development frequently without operationalising the concept any further, while yet others express a holistic understanding of sustainability and its integration into tourism. One example of this comes from Nordland, one of the northernmost counties of Norway:

"Visitors in Nordland have to meet sustainable tourism destinations with quality in all parts of the value chain. It is a considerable challenge to develop sustainable destinations. It requires that planning and development of the sector must be seen in a holistic societal context. A sustainable experience development of Nordland means that we must ensure conservation of nature, culture and environment, at the same time as making the experience-development strengthen local quality of life, social values, local control, and engagement. Economically sustainable and competitive tourism destinations and tourism businesses which create local added value are key parts of the sustainability concept which forms the basis of the strategy" (Nordland reiselivsstrategi, 2017–2021).

Based on how differently sustainability was addressed in the various TDPs, it was decided to look more into how sustainability concerns were treated in the analysed documents. Consequently, this chapter takes a closer look at how TDP's frame sustainable tourism development in particular, and how they approach the subject. As a first step, a typology for the extent to which—and whether—sustainability concerns were treated seriously in TDPs was created. This was then used to explore patterns that might help explain observed differences. Due to the centrality of the issue of sustainable development in the Nordic countries in general,

and in tourism organisations internationally and nationally, it was decided to endow this last thematic analysis with additional exploratory content. For example, would observed differences be explained by the presence or absence of having previous experiences with the negative consequences of tourism, to the degree that these were mentioned in the TDP? Would the TDP process co-vary with the way sustainability concerns are treated in the TPDs? These exploratory questions add another layer to our analysis, and the Nvivo software facilitates precisely such an analysis of patterns within qualitative data through its matrix query functions.

The remaining sections of this chapter are structured as follows: First, the classification of TDPs based on their use of 'sustainability', the content that is reflected in the coded text, is introduced, and the distribution of the TDPs according to these classes is presented and described. As part of this process, a map of the Nordic region is presented, showing the way in which sustainability concerns are handled in the TDPs we have analysed (7.1). After this, two analytical sub-sections follow. These explore patterns that might help explain observed differences in the treatment of sustainability concerns across the material analysed. The first analysis concerned whether the consequences of previous negative experiences of tourism (expressed in the TDPs) influence how sustainability concerns are treated in the TDPs (7.2). The second, analysis looks at whether an association is observable between the process through which the TDP has been elaborated/developed, and the way sustainability concerns are treated in the TDP (7.3). The sub-chapter ends with a short summary, the presentation of results and discussion.

The right of public access to nature has in recent years caused disputes in some regions, for example between farmers and tourism operators in Faroe Islands.

Photo: Vaida Ražaitytė

7.1 A typology of sustainability concerns in TDPs

The initial reading and coding of TPDs showed what was – to the research team – a surprising difference in the way sustainability concerns were treated in TDPs, if they were treated at all. Some would refer to global agendas about sustainability (with reference to the Brundtland report, for example), but would not further operationalise the concept into the local setting and within the tourism sector. Some TDPs would use 'sustainability' strictly and explicitly with regards to the economic viability of tourism companies and organisations. Other TDPs would discuss the meaning of sustainability in detail, and work extensively with the operationalisation of this concept in the local, sectoral context, setting ambitious goals. Seeing this diversity in the use of the concept and the coded material in the TDPs, the team decided to develop a typology of TDPs based on their treatment of sustainability concerns. (see Annex 5 for an analysis of the coding frequency, and national differences therein, of the variable for sustainability concerns).

Based on how the content of the coded text and the operationalisation of the concept was developed, a simple typology was developed that would reflect the TDP variation, while helping to create an overview of the different 'takes' on sustainability within the material. The aim was that this would furthermore allow for subsequent analysis by splitting the sample along these types. The typology resulted in having 5 classes, from 'no mentioning of sustainability' to a detailed and serious engagement with the concept, including the economic, social, and environmental aspects of sustainability. A further distinction was made regarding whether TDPs discussed sustainability issues only within the tourism business, or whether such discussions were considering feedback to and from societal elements beyond the tourism industry. See box 7.1 for the definition of the different sustainability-concern types used.

BOX 7.1: TYPOLOGY OF TREATMENT OF SUSTAINABILITY CONCERNS IN ANALYSED TDPs

Dotted: No mentioning of sustainability in the TDP (If no text-bits were coded under 'sustainability concerns' an additional word-count was carried out in Nvivo).

Grey: Sustainability mentioned in the TDP, as reference to national or international goals, but not operationalised or integrated further.

Greyish Green: Sustainability concerns mentioned in TDP with regards to economic sustainability or viability of tourism businesses.

Light Green: Sustainability concerns mentioned and elaborated on, including economic, social, and environmental aspects thereof, and some operationalization with respect to the tourism sector.

Dark Green: Sustainability concerns mentioned and elaborated on, including economic, social, and environmental aspects thereof, and some operationalization with respect to the tourism sector and sectors outside thereof.

Each TDP was assigned a typology, depending on the degree to which it took sustainability concerns into consideration, and the degree of holism in its treatment of the concept. No examples can be given for the dotted TDPs, as they are characterized by the omission of sustainability concerns in the text. For the grey class, a Danish example comes from Ringkøbing-Skjern municipal thematic strategy, which uses "sustainable tourism" as a heading, but without any treatment of sustainable tourism in the text below the heading. The point of this section is that it is economically important for the municipality to be allowed to extend summerhouse areas in coast-near locations, as subsequently made possible by a recent new coastal planning law in Denmark (Ringkøbing-Skjern, 2015). Another example is from the National Greenlandic tourism strategy: "...the development of tourism in Greenland into a sustainable profession can only happen through a broad expansion of infrastructure. A one-sided focus on a single destination is too narrow to allow the wished-for long-term, sustained growth in the tourism sector. A sustainable development of tourism thus demands direct flights with larger airplanes to more regions in the country" (National sektorplan for turisme, 2016–2020).

An example of the greyish green typology can be found in Reykjanes in Iceland. "The importance of shaping and maintaining the sustainable development of tourism in the area lies in creating stability in the tourism environment, and opportunities for economic benefits for companies and municipalities in the area." While sustainability is mentioned regularly throughout the document as a priority for future development, these discussions are almost exclusively about its value for marketing and generation growth (Reykjanes, 2018–2021). The TDP from Swedish Sörmland, entitled *Strategy for a sustainable tourism*, has a similar tone, focusing on growth and mainly discussing sustainability in reference to national goals. The Sörmland TDP refers to the national strategy for the tourism sectors and states: "The vision focuses on sustainability, and [the proposition] that the hospitality industry should be Sweden's new basic industry. The overall goal is for the industry to double in ten years." However, the same document recognises the different dimensions of sustainability, but it does not operationalise the term beyond being an asset for businesses and destinations. "The concept of sustainability includes environmental, social and

economic factors. Sustainability issues place greater demands on companies, but at the same time provide a competitive advantage, both for them and for the destination" (Sörmland, 2013–2023).

An instance of a holistic approach to sustainability that embraces more than the tourism sector comes from Norway, where (for example) the regional TDP for Buskerud comments: "Sustainability is a global challenge which the tourism sector has to take part in solving. Sustainability must thus be safeguarded at all levels in the future. The customer's expectation of comfort at the right price is unchanged. This is a challenging transformation". (Buskerud, 2016). Another example, from a TDP classified as "dark green" is from Ytre Namdal, Norway, which states that, "Sustainable tourism focuses not only on the benefits for the tourists, but on the effect of tourism on the visited places and values in relation to nature, culture and local communities. Sustainable tourism must be related to responsibility, quality and a long-term perspective, and must be incorporated in the municipal policy" (Ytre Namdal, 2013–2020). However, the TDP from Ytre Namdal goes on to set goals to achieve a growth in arrivals at the local airport. The inherent contradictions between this and environmental concerns are not addressed. However, this is in no way particular to Ytre Namdal. Rather, it is a frequent occurrence, as most of the TDPs strive for quantitative growth, in the number of tourists, the number of overnights stays, economic turnover, and often local jobs.

Not many TDPs go further than considering the local consequences of tourism and the sustainability of actions performed in that area. However, the tourism plan for Sogn & Fjordane, Norway, also includes consideration of the non-local consequences of tourism to the area. They write: "We aim for more tourists in the winter and shoulder seasons in order to obtain more year-round jobs in the region. And we aim for more Norwegian tourists in order to reduce the negative global environmental impact of tourism" (Reiselivsplan for Sogn og Fjordane, 2010–2025). Their holistic view of the tourism sector for regional development is also expressed in their goals, which are to "add value, make tourism in Sogn and Fjordana more sustainable and provide a boost to the tourism sector as a driver of regional development and the economy" (*Ibid.*).

The assignment of each TDP to a 'sustainability concern treatment class' was coded into Nvivo to allow for further analysis using this classification. Employing this typology, the distribution of TDP 'sustainability concern' types for the entire material is shown in the following pie chart (Chart 7.1).

Chart 7.1: Distribution types of TDPs regarding sustainability concern treatment.

As already mentioned, a large proportion of the TDPs analysed, 14.5% in total, do not mention sustainability in any way. Close to a quarter, 21% of the TDPs analysed, mention the concept of sustainability, but in a very limited way, as a reference to an overall, global or international or national agenda, but without further operationalising it, or setting any goals regarding this for the local context. Thirteen percent of TDPs engage further in sustainability concerns, but in a way that is limited to the inclusion only of economic sustainability for tourism businesses. Just over half of the TDPs, 51%, engage in a holistic treatment of sustainability concerns, including its economic, social, and environmental aspects. However, depending on whether the report discusses sustainability concerns only with regards to the tourism businesses, or whether other parts of society (and feedbacks to and from these) are included in the discussion, this 'green' group has been divided into two sub-types: The light green TDPs, with a tourism-centred sustainability treatment, which represents 21% of the total TDPs; and the dark green TDPs, with a holistic sustainability treatment, which represents 30% of the total TDPs analysed.

As is visible from the table below (and from the map in figure 7.1), there are considerable national differences regarding sustainability treatment in the sub-national TDPs analysed, and consequently their assignment to different sustainability-concern types.

Sustainability concerns	Denmark	Finland	Iceland	Norway	Sweden	Faroe Islands	Greenland	Åland	Total TDPs in category
Dotted	11	3	0	0	1	0	1	0	16
Grey	8	10	1	2	1	0	1	0	23
Greyish Green	3	0	1	2	8	0	0	1	15
Light Green	2	2	3	5	11	0	0	0	23
Dark Green	6	6	2	13	5	1	0	0	33
Total TDPs per country	30	21	7	22	26	1	2	1	110

Table 7.1: TDPs by Sustainability concern typology by country.

Based on this classification, a map was created, indicating the distribution of different TDP sustainability concern treatment classes in the Nordic territory (figure 7.1).¹⁰ The dotted areas represent those TDPs that do not mention sustainability in any way. These mainly come from Denmark, as well as a few from Finland, Norway, and Sweden. The grey areas represent TDPs who mention the concept of sustainability, but in a very limited way, as a reference to an overall, global or international or national agenda, but without further operationalising or setting any goals regarding this for the local context. This type of treatment of sustainability concerns is mainly present in Finland, followed by Denmark and Sweden, plus a few cases from Norway and Iceland. Together, these two types represent almost two out of every five TDPs.

They greyish green areas represent those TDPs which limit their discussion of sustainability to the economic sustainability of tourism businesses. This type of TDP is mainly found in Sweden, followed by Denmark, and then a case from each from Finland, Norway and Iceland.

The green areas, which represent just under half of the TDPs, engage in a holistic treatment of sustainability concerns, including their economic, social and environmental aspects. The light

10. In order to represent the different geographical coverage of the TDPs analysed, this is presented with a regional and a sub-regional level. The sub-regional level mainly consists of single municipal plans, but in some instances two or more municipalities have made collective plans. Also, TDPs that cover (e.g.) a coastal area or an archipelago that crosses over regional/municipal borders are included in this category.

green TDPs, with a tourism-centred sustainability treatment, come predominantly from Sweden, as well as from Iceland, Norway, Denmark and Finland. The dark green areas represent TDPs with a holistic sustainability treatment, and predominantly come from Norway, followed by Sweden and Finland.

Sustainability classification of tourism development plans (TDP) 2020 Nordregio

Figure 7.1: The map is based on the coding of the TDP texts for 'sustainability concerns' and a subsequent categorisation of the coded sequences into a typology developed to describe the different treatment or content of sustainability concerns in the TDPs analysed.

National differences are likely to reflect a combination of differences in the type of tourism that characterises each country and region, and the associated pressure on natural and social resources. Also, the degree to which national authorities and national tourism actors have engaged with sustainable tourism transformations. While the sustainable development of tourism is present in all national frameworks for tourism development in the Nordic countries, Norway, for example, stands out as having set ambitious goals at a national level, in a way that is frequently reflected in the sub-national TDPs, and where local ambitions often are framed with reference to national guidelines. For example Buskerud, which has taken the transition towards sustainable tourism as the foundation of its regional tourism plan, refers to the importance of the introduction of sustainable tourism in the national government's tourism strategy, "Valuable experiences" (from 2007). This placed the development of Norway as a sustainable destination as a precondition for the government's business policy regarding the tourism sector. The importance of a national actor working on innovation within tourism is also highlighted. For Buskerud, this means it has decided that "the tourism sector must be sustainable, both regarding businesses and destinations. By sustainable transition we mean that the actors behave responsibly in a long-term perspective. A sustainable tourism sectors focuses both on the benefits for travellers and on the impact of tourism on the humans and places visited, and on values in nature, culture and local community. Sustainability means that businesses and destinations act responsibly in a long-term perspective." (Buskerud, 2016). It is our general impression from coding the material, that the Norwegian sub-national TDPs, especially, refer much and positively to national strategies as well as to national initiatives

regarding tourism innovation.

As mentioned before, the TDPs identified for the rural regions of the Nordic countries represent a rather broad range of types of documents, constituted from different types of actors, through different types of processes, and also for varying purposes. This variety in type and purpose must be taken into account when considering the variety in how the TDPs treat sustainability concerns, as in itself it can be expected to explain some of the observed variation. If it had been possible to identify and collect the exact same type of document for all areas, for example destination management plans by DMOs at similar administrative levels, a comparison between the documents would have been more straightforward, as would the interpretation of the results.

Taking the diversity in coded material into account, some patterns still stand out, however. For Denmark and Finland, 30 and 21 TDPs have been analysed, respectively. The majority of these are classified as being 'dotted' or 'grey' (19 of 30 in Denmark, and 13 of 21 in Finland), meaning that the TDPs have either no mention of sustainability concerns at all, or that they are addressed in a way that mentions this agenda at national and/or international level, but without operationalising it at the sub-national level. The first type is the single most frequent type in Denmark; the latter is the single most frequent type for Finland.

Sweden, Iceland and Norway all have the majority of their TDPs classified as light or dark green. That is, they treat sustainability concerns in a holistic way, either with a focus on the tourism sector, or also including elements of relevance to wider society (16 of 26 in Sweden; 5 of 7 in Iceland, and 18 of 22 in Norway). Of these, Norway stands out as being the country where the dark green type of TDP is the single most frequent type.

Yet, even though a TDP treats sustainability concerns holistically, including economic, social and environmental concerns, and does so in an operationalised way, the typology does not include whether internal contradictions exist in the TDPs. For example, several TDPs that discuss sustainability concerns in great detail, and set goals for themselves within this agenda, simultaneously aim to increase the number of visitors, including those who arrive by air, or the number of cruise tourists, despite of the known environmental costs of these procedures.

7.2 Do negative experiences affect sustainability concerns?

Negative experiences of tourism are hardly reflected in the TDPs, despite media debates and academic literature about increasing numbers of tourists pressuring fragile environments, public goods (including regional and local infrastructure), and a questioning of the long-established Nordic tradition of the public right of access. Overall, negative experiences are only addressed in 13 out of the 110 TDPs included in the final analyses. This amounts to just 12% of the TDPs that mention experiences of a negative impact from tourism. There is a clear geographical pattern here, in the sense that none of the TDPs from Denmark or Sweden mention negative experiences from tourism. The national tourism plan of the Faroe Islands discusses negative impacts in some detail as well as the majority of Icelandic TDPs and some of the Finish and Norwegian ones. However, comparing that with media debates and academic literature, it is evident that the TDPs underreport negative experiences relative to these other sources.

It is therefore valid put forward the question about whether having experienced the negative consequences of tourism influences sustainability concerns expressed in TDPs? By looking at the classifications of how sustainability concerns are addressed, and whether or not TDPs from the area recognise that the region has experienced negative effects from tourism, a tendency is detected which suggests that having experienced negative consequences of tourism is associated with TDPs that have a more holistic treatment of sustainability concerns in tourism, and which are classified as light or dark green in our typology. In fact, all the TDPs that mention some experiences of negative effects of tourism fall into these two 'greenest' categories of sustainability concern (see table 7.2).

Sustainability concern typology	TDP mention having experienced negative consequences	No negative experience mentioned in TDP	Sum
Dotted	0	16	16
Grey	0	23	23
Greyish green	0	15	15
Light Green	4	19	23
Dark Green	9	24	33
Total	13	97	110

Table 7.2: Number of TDPs according to their mentioning of having experienced negative consequences of tourism, relative to their sustainability concern typology.

A likely explanation of this pattern is that a broader, more holistic view of sustainability concerns in tourism, and its integration with the surrounding society, is in some cases a *reaction* to negative experiences. Simultaneously, it suggests learning ability in the areas where the TDP recognises that tourism has previously been associated with some negative consequences, and that a holistic approach to sustainability concerns that includes not only economic aspects (but also social and environmental ones), is one of the ways in which the actors behind the TDP have tried to safeguard against similar negative experiences in the future. The Faroe Islands stands out as having a (national level) TDP which simultaneously discusses the experienced negative effects of tourism, while engaging in a discussion of how the Faroe Islands itself can learn from the Icelandic experiences of over-tourism in order to prevent the same from happening in the Faroes.

Obviously, considering the very limited mention of negative tourism experiences in the TDPs, there are likely to be more areas which have actually experienced such phenomena, but which choose not to mention them in their TDPs. This, however, will also limit their full learning experience from those situations. Greenland, for example, writes positively about the high number of tourists visiting Iceland, and wants both to follow the Icelandic example and hopes to attract some tourists to continue their travel on from Iceland to Greenland. Yet the national tourism plan also recognises that with increasing number of visitors, regulative measures must be developed and adjusted. It acknowledges that Iceland has experienced challenges regarding the regulation of the number of tourists in certain areas, and that Greenland must learn from that Icelandic experience. The Greenlandic plan comments that protection and regulation of access to the most popular tourist areas, like the UNESCO World Heritage area near Ilulissat, may soon be required. Regarding sustainability, the National Tourism Plan only refers to national and international sustainability goals, but does not operationalise them in any way (National sektorplan for turisme, 2016–2020).

Denmark and Sweden stand out as countries where the rural TDPs analysed do not mention any negative impacts of tourism. There could be many different explanations for this. Under-reporting of negative experiences is one possible explanation. Yet, informed by research on what puts pressure on the Nordic 'right to roam', for example, or on the public right of access and negative reactions to 'over-tourism', the problem mainly arises in situations where tourists come as large, organised groups—rather than via the traditional Scandinavian 'public outdoor recreation' which tends to be more individual (Kaltenborn *et al.*, 2001; Sutherland & Stacey, 2017). One hypothesis could be that rural parts of Denmark and Sweden are less exposed to such organised tourism involving large groups than other parts of the Nordic region. This might be due, for example, to less prevalence of cruise tourism than is the case for Norway, Iceland and the Faroe Islands.¹¹

Norway is a country with a large and growing cruise tourism industry; but it is very unevenly distributed throughout the country. Where the negative impacts of tourism are discussed in the

11. However, some TDPs which report negative experiences from tourism, do so regarding individual tourism (i.e. not related to organised 'package' tours, or cruise tourism). For example, Nordland (in Northern Norway) is an area which has experienced high pressure on its fragile environment from individually organised travelling, where tourists 'wild camp' in exits and picnic areas, thereby littering and causing more damage to nature than was intended (Nordland reiselivsstrategi, 2017-2021).

Norwegian TDPs, it is often associated with cruise tourism and its concentration in particular times and places. For example, Sogn & Fjordane Regional municipality comments that the increase in cruise tourism has put the infrastructure of local communities to the test in a negative way (Sogn og Fjordane, 2010–2025). Similarly, the cruise strategy for Western Norway mentions views regarding so-called 'people pollution', with too many visitors arriving at the same place at the same time, in relation to cruise tourism. Indeed, some local communities believe that cruise tourism reduces the quality of life and inhabitants' wellbeing during the cruise season. The report also mentions the centrality of environmental issues in a critique of cruise tourism (Cruisestrategi for Vestlandet, 2016–2020).

Iceland has experienced an enormous increase in visitors between 2010 and 2019, which has had various impacts on its economy, society and the environment (Sæþórsdóttir, Hall & Wendt, 2020). This is in some ways reflected in TDPs, mainly in relation to carrying capacity and environmental concerns at popular nature sites, tourist behaviour, infrastructure not being sufficient to cope with visitor numbers, and sometimes even the social tolerance of locals. In the TDP from the Icelandic South region, it says that "Tourism in the South has put a strain on nature, most notably at the most popular tourist destinations where development, management and preservation are lacking." It later adds that "...to many visitors [this] has put a strain on the tolerance of locals and [has] also had a negative effect on the experience of tourists." In the same document, limiting access to certain areas is named as an option (Suðurland, 2018–2021), while in the eastern part of Iceland increased tourism is said to have exacerbated a lack of housing for tourism staff and residents, because the increase in Airbnb rentals in smaller communities has become so common. Resentment towards cruise tourism has also been expressed in some areas in Eastern Iceland. "Negative impacts from cruise ship tourism appears when towns are getting too crowded from cruise tourists, and the income from cruise ships does not benefit the local community. Locals can feel that cruise ship tourism is more about tourists showing off, and that it does not create a positive feeling among the locals." (Austurland, 2018–2021).

The Faroe Islands have not experienced 'over tourism' in the same way as Iceland, but their national tourism strategy is nonetheless much more aware of the challenges and problems that have risen because of what has happened in their neighbouring country and they place greater emphasis on preventing the same from happening to them. The Faroe Islands also stands out as the country where 'the right to roam' was the most-coded variable. Some 16% of the coded variables in their TDP was related to that subject, followed by 'sustainability concerns' at 15%. The negative experience expressed by the Faroe Islands is mainly due to visiting cruise ships and public access to nature, on both private and public land.

Zooming in on the distribution of TDPs from each Nordic country, and whether they report having experienced the negative consequences of tourism according to sustainability concern type, a detailed table is presented in Annex 6.

7.3 Association between TDP processes & treatment of sustainability concerns

As explained in Chapter 3, a typology was developed for the distinct processes by which TDPs were elaborated (see Box 3.1). The following sub-section asks whether the data show any association or pattern linking the process leading to the TDP, and the treatment of sustainability concerns in the TDP?

The table below shows a cross-tabulation of the TDP process classifications, according to their sustainability concerns typology. It features all 110 TDPs analysed, including national level TDPs from the Faroe Islands, Greenland and Åland. While the number of TDPs analysed is too (low relative to the number of categories used) to allow for a Chi² test of statistical significance for observed distribution (relative to an expected one, assuming no association), a pattern is still observable. Looking at the distribution of TDPs in the table below, there is an association between the least participatory process types (the institutionally-led and the consultancy-led TDPs) and TDPs with no, or no operationalised treatment of, sustainability concerns (being within the dotted or grey types) in the top left-hand corner of the table (highlighted in bold). Meanwhile, in the bottom-right-hand corner of the table, an association is visible between the more inclusive processes (whether limited to the tourism sector, or extending to include a broad

range of actors) and TDPs that have a holistic concept of sustainability concerns, and treat these in some or much detail (consequently being classified as Light and Dark Green TDPs—highlighted with bold).

Sustainability Concerns	Institutionally led	Consultancy led	Inclusive, tourism operators	Inclusive, broad participation	Total
Dotted	9	2	3	2	16
Grey	5	2	8	8	23
Greyish Green	5	0	8	2	15
Light Green	2	1	16	4	23
Dark Green	4	1	14	14	33
Total	25	6	49	30	110

Table 7.3: Distribution of TDPs according to development process leading to TDP (4 classes,) and their treatment of sustainability concerns (typology with 5 types). N=110 TDPs.

As the table shows, 11 of the total of 16 TDPs which did not mention sustainability at all, or only in a very limited way, were developed in an institutional or consultancy-led process with limited public participation. This amounts to 65% of TDPs with no formulation of sustainability, or a very limited operationalising of it.

At the other end, a total of 28 out of 33 TDPs that were classified as having the most holistic view on sustainability, were developed through a broader participation process, either with the participation of key commercial tourism stakeholders, or tourism operators along with the other stakeholders and the general public. This means that 85% of the TDPs that were classified 'dark green' were developed in a broad participation process. Similarly, 20 of the 23 TDPs that were classified as 'light green', were developed by an inclusive, participatory process, either with the participation of key commercial tourism stakeholders, or tourism operators along with the other stakeholders and the general public. We argue that this distribution gives a strong indication that the more inclusive processes tend to result in more holistic TDPs. Or, that there is an association between TDPs resulting from an inclusive, participatory process, and ones that treat sustainability concerns in a holistic, detailed and (relatively) operationalised way.¹² This is an important finding, as it gives a basis for recommending that, if future TDPs are to treat sustainability concerns more holistically, broader, then more broadly participatory processes for creating them are to be preferred.

Generally, the table shows that moving away from a traditional, business-development-authority led process, with limited outside participation, towards a more of a community-based destination development process, with a broader collaboration of different sectors, along with the local population (thereby allowing multiple viewpoints and experiences to be voiced in the process), leads to a more holistic end product. These TDPs tend to take more factors into account when discussing sustainability concerns in tourism development. On the other hand, those TDPs developed without broad participation, tend to focus more on, and sometimes exclusively on, the economic aspects of sustainability, seen from the perspective of tourism businesses alone—that is, without the inclusion of externalities. However, the table above also indicates that TDPs which leave out sustainability concerns entirely, or focus entirely on the 'economic sustainability' of tourism businesses, are found in TDPs resulting from all types of processes.

As stated earlier, tourism is a complex phenomenon that influences, and is affected by, almost every aspect of the environmental and socio-cultural fabric of the destination in question. Tourism influences several other sectors, as well as the destination's culture and environment. This can make it very challenging to identify and align common goals and interests. Yet our

12. Zooming in on the distribution of TDPs from each Nordic country, and those expressing having experienced negative consequences of tourism by sustainability concern type: this is presented in a table in Annex 6.

analysis shows that TDPs that were developed with broader public participation tend to discuss the importance of these different aspects in much more detail. These TDPs do not focus solely or exclusively on accommodation, transport, restaurant, tour operators and direct tourism activities in the destination. Rather, they tend *also* (to some extent) to take into account the complex interplay (and sometimes the conflicting interests) involved in tourism development and community development—including physical planning, job creation in other sectors, as well as attractiveness and the ability to attract qualified, skilled labour.

According to our analyses of TDPs in the rural regions of the Nordic countries, the identified pattern suggests that TDPs developed through broader participation and through collaboration between different sectors, better accomplish the task of aligning with broader societal interests. These TDPs do a better job of representing, for example, the region's agriculture and local food production, cultural life, physical environment and appearance, natural environment and biodiversity, history, authenticity, and so on. This often results in more holistic view of, and response to, sustainability.

7.3.1 National differences

Taking a national perspective, and looking at the processes behind each TDP within one country, some national differences are also observable. **Denmark** shows a binary distribution, with more than half of the TDPs originating from inclusive processes, mainly broad ones; while at the same time having relatively many institutionally-led TDP processes. **Finland**, on the other hand, predominantly has TDPs that have been developed through an inclusive process, whether focusing on the participation of tourism actors, or including abroad public participation. Finland, however, does not show the same trend towards a polarisation of inclusive processes also resulting in more holistic sustainability concerns that is found in the material in general. In **Iceland**, the vast majority of TDPs have resulted from inclusive processes involving key tourism actors, the majority of which simultaneously employ a holistic approach to sustainability concerns (mostly limited to the tourism sector, though). **Norway**, like Iceland, has a majority of TDPs developed through inclusive processes, mainly limited to the participation of tourism actors, but also some with a broader, participatory process. The TDPs based on inclusive processes predominantly result in TDPs with holistic approaches to sustainability concerns, predominantly including sustainability concerns that bridge from the tourism sector over to other parts of Norwegian (or global) society. Consequently, in both Iceland and Norway, a general tendency towards an association between inclusive processes and holistic sustainability concerns is found. **Sweden** shows a larger variety in processes leading to the TDPs, but still it reflects the trend found in the material in general, of an association between institutionally-led or consultancy-led processes and limited (or no) sustainability concerns, and between the more inclusive processes and more holistic sustainability concerns (See table 7.4).

Country	Sustainability concern type	TDP process type				Sum
		Institutionally led process	Consultancy led process	Inclusive, tourism actors	Inclusive, broad participation	
Denmark (N=30)	Dotted	7	1	1	2	11
	Grey	1	0	2	5	8
	Greenish Grey	0	0	2	1	3
	Light Green	0	0	0	2	2
	Dark Green	2	0	0	4	6
	Sum, DK	10	1	5	14	30
Finland	Dotted	1	0	2	0	3

(N=21)	Grey	1	1	6	2	10
	Greenish Grey	0	0	0	0	0
	Light Green	0	0	1	1	2
	Dark Green	0	0	1	5	6
	Sum, F	2	1	10	8	21
Iceland (N=7)	Dotted	0	0	0	0	0
	Grey	0	1	0	0	1
	Greenish Grey	0	0	1	0	1
	Light Green	0	0	3	0	3
	Dark Green	0	0	2	0	2
	Sum, I	0	1	6	0	7
Norway (N=22)	Dotted	0	0	0	0	0
	Grey	1	0	0	1	2
	Greenish Grey	2	0	0	0	2
	Light Green	2	1	2	0	5
	Dark Green	1	0	8	4	13
	Sum, N	6	1	10	5	22
Sweden (N=26)	Dotted	0	1	0	0	1
	Grey	1	0	0	0	1
	Greenish Grey	3	0	4	1	8
	Light Green	0	0	10	1	11
	Dark Green	1	1	2	1	5
	Sum, S	5	2	16	3	26

Table 7.4: Distribution of TDPs according to the type of process that has led to the TDP, by type of sustainability concerns. Table includes the five largest Nordic countries (N=106).

7.4 Summary

Sustainability concerns are given a high profile in the national tourism strategies of Nordic countries. However, this is less so at the sub-national level. Quite often 'sustainable tourism' is presented as the goal for future destination development, and all the national tourism policies of all the Nordic countries also have sustainable development as an overarching theme. The vast majority of TDPs (85.5%) mention sustainability somewhere in the plan. However, it was surprising to the team to discover that some TDPs, which were all still valid at the time of identification and sampling, and thus were created in the not-too-distant past, did not even mention the word 'sustainability' or derivatives thereof. Some 14.5% of the TDPs do not mention sustainability at all. Others (21%) mention sustainability concerns, but provide no further operationalising of the concept within their plans. Just over half of the TDPs express concerns about tourism development in terms of a strain on the environment or social tolerance. If including TDPs whose sustainability-focus is limited to economic dimensions, the proportion of TDPs dealing with sustainability elements increases to two-thirds. At the same time, almost all the TDPs set goals for or aim for economic growth within the tourism sector, either measured as increasing number of overnight stays, increasing turnover in businesses, and or increasing indirect consumption generated by the tourism industry.

While one could argue that sustainable development should not be the prime concern of DMOs and tourism actors who are focusing on the viability of their business, it is still surprising, because sustainability concerns are so highly profiled in national and international tourism strategy documents, as well as in academic literature on tourism development; and because sustainability is also increasingly becoming a competitiveness parameter within the tourism sector. It is reasonable to expect TDPs to express important strategic directions for the next few years (the period covered by the tourism plan), and to anticipate that they will take a strategic view at a higher level than the individual tourism business, and aim to set out a roadmap for steps that local tourism actors will need to take in order collectively to position destinations positively within tourism development. It is therefore surprising that TDPs can be formulated without the slightest mention of the greatest challenge to all our societies, as well as to the tourism sector, in our times. In fact, the coding process showed a very uneven distribution of attention given to sustainability concerns. While 'sustainability concerns' is one of the most frequent variables used in analysing TDPs (See chart 3.1), around one third of the TDPs either do not mention 'sustainability concerns' in any way, or do not mention them beyond a reference made to a national or international agenda (see Chart 7.1).

Approximately half of the TDPs analysed have a holistic approach to sustainability concerns, including their economic, social, and environmental aspects. Approximately a third of these (21% of the entire material) do so within a tourism focus, whereas the rest (30% of TDPs analysed) include wider societal elements, bridging over from tourism into wider societal and developmental aspects. However, the variety of TDPs included in the analysis is likely to influence the breath of the focus of their plans.¹³

Having experienced the negative consequences of tourism, and expressing these in the TDP, is a move associated with 'greener' TDPs, i.e. TDPs which engage a more holistic treatment of sustainability concerns, including social and environmental elements, rather than just economic ones. This indicates a willingness to learn from past mistakes, and to plan for a better future, on the part of those TDP authors who include both positive and negative aspects of tourism in their TDP. Furthermore, more participatory and inclusive processes for the development of a TDP is associated with a more holistic treatment of sustainability concerns in the TDPs.

13. It should be recalled, that the inclusion of a greater variety of documents containing sub-national tourism plans is likely to influence the distribution in terms of whether the documents analysed focus entirely on tourism (as is more likely to be expected from tourism sector actors, as for example a DMO making a Destination Management Plan), or include wider societal concerns (as is more likely when reading a planning document from municipal or regional authorities, and when addressing tourism as one of multiple aspects within the planning or strategy document).

8. Discussion, conclusions, and recommendations

The development of a more sustainable rural tourism in the Nordic regions faces a range of different challenges. Many of these are identified and confirmed in the coding and content analysis of the 110 TDPs across the Nordic regions. The frequency of variables that were coded in the TDPs provide some portrait of the topics they prioritised. Descriptive statistics show that close to 80% of the variables coded concentrate on around 12 of the total 22 variables. These include coordination and collaboration issues, expectations of economic growth, competence development, challenges (in general, and related to seasonality), sustainability concerns, nature protection and reserves, and nature-oriented tourism, as well as regional development aspects of tourism such as how to secure local benefits from the industry.

The variables that were mentioned the fewest times should, however, not be considered as 'less important'. A more qualitative analysis of these topics also reveals that although they do not take much space in the entire body of material, in specific regions they are widely considered some of the most important issues for the future of tourism. Themes like experiencing and avoiding possible negative impacts of tourism, expectations of local job creation, the role of cruise tourism and the right of public access are not always widely mentioned, but where they are discussed they are usually considered among the biggest challenges. Cruise tourism is an example of a theme with this sort of pronounced pattern. Denmark, Finland, Sweden and Åland barely mention it, while some TDPs in Norway, the Faroe Islands, Iceland and Greenland discuss it in detail. These lesser-mentioned themes are also often areas of debate and conflicting interest among stakeholders. However, the TDPs generally frame tourism positively, or, if any contested or critical issues are mentioned, they are often discussed in a diplomatic way. As a result, many conflictual issues, which receive much attention in academic literature on tourism, have been left out of these TDPs. There are, however, exceptions. The right to roam is one such theme, which has gained considerable attention in literature about tourism and is—just like broader negative effects and cruise tourism—a much-debated topic where it is relevant, but in the overall data it is only weakly represented.

According to our analyses of these TDPs, economic growth is generally viewed as the most sought-after benefit of tourism. It is seen as a source of job creation, with a possible multiplier effect providing a boost in revenues for a wider range of other industries. The synergies between tourism and other industries are often highlighted, and economic growth from tourism is also considered important for positive demographic developments, by contributing to job diversification and increasing the attractiveness of a place, both for investment and as a place to live. The growth of tourism is happening because it is a priority in many regions, both in terms of making the tourism season longer in places that already have considerable tourism, and in attracting visitors to areas which are developing. Expectations that tourism-related work could develop into a more skilled sector, and as a result provide more valuable jobs, are also present in the TDPs. A prerequisite for tourism work to become a more stable and steady employment proposition (and therefore of greater value) is often said to involve making tourism a year-round industry. Because of this, seasonality issues are viewed as a major challenge, and the main obstacle to a further growth of the tourism sector in the rural Nordics. While seasonality is most often framed as a challenge, it also has the tendency to be considered an opportunity, since extending tourist high seasons and creating new ones is seen as an opportunity to grow, and to enable a genuine diversification of employment.

The majority of the TDPs expressed the will to extend their tourism season, while others also addressed the need to join forces in creating 'functional tourism regions'—that is, a destination made up of many smaller units, thereby contributing to a more even distribution of visitors. Seasonal issues are in some instances connected to environmental concerns, especially concerns over sites that tend to be overcrowded in the course of a few weeks over summer. Overall, when looking over the field and what the different TDPs have to say about seasonality and the distribution of tourists over the year and the local area, some contrasts can be detected. From

the standpoint of regions that are emerging as destinations and want to attract more visitors, with a few exceptions issues of carrying capacity and environmental concerns are not so prominent. The focus is more on better connections with neighbouring areas that already have substantial tourism, securing the necessary infrastructure (mainly the means of transport), and marketing themselves in attempts to 'get a piece of the action'. This can be viewed as the longing for, and expectation of, the securing of a better distribution of tourists geographically. In other regions which have experienced a significant increase in tourism, the discussions tend to be more about a more even distribution of tourists over the year, putting greater emphasis on increasing visits during low seasons by trying to create new experiences, develop new attractions, and get visitors to stay longer in a specific area. Carrying capacity—both environmental and infrastructural, as well as in terms of social tolerance—is addressed in the TDPs of a few of the more popular tourist regions, while some areas tend to discuss environmental concerns and protection as 'protection of economic opportunities'. Others, however, present environmental concerns as ways of preserving certain areas, and promoting tourism growth while at the same time contributing to sustainable development.

Partly as a reaction to issues related to seasonality, and as a challenge in itself, better coordination and collaboration is the most discussed topic overall in our TDPs. Collaboration and coordination are expressed on different scales and at different levels. Collaboration is seen as an issue of importance in creating a better-functioning tourist destination, whether that is about distributing tourists better over the year, or to attracting them to lesser-visited places within a defined area. Better coordination among tourism actors is also widely encouraged, both locally (within a TDP territory) and between levels (from tourism actors within the TDP area, to higher administrative levels, whether at destination, regional or national—or sometimes even international—level). Cooperation across sectors or fields is also a common theme: that is, extending collaboration from just involving the main tourism actors (typically private sector businesses, DMOs and government organisations), towards also involving private businesses in other sectors, or civil society organisations, or groups of engaged citizens, with the ultimate goal of broadening the benefits that rural tourism can generate. Additionally, many TDPs devoted time to discussing two additional elements required for better cooperation. First, further collaboration and coordination to improve data and data-based innovation, plus improvements within the tourism product itself. Second, collaboration and coordination regarding destination branding and marketing.

Due to the broad and multi-faceted character of tourism—the interplay of different sectors, challenges like seasonality and the heterogeneous size of economic actors – collaboration and coordination is often a serious challenge. While many regions have in recent years actively taken steps to establish collective platforms for tourism development, overall coordination and collaboration is still by far the most discussed topic in TDPs, e.g. it is the most-coded variable in Denmark, Finland, Norway and Sweden, while also being among the most mentioned topics in the four less heavily populated countries. The longing for different forms of closer cooperation in tourism development, and better coordination, is therefore a common priority expressed in almost every region's TDP.

Tourism is often viewed as one of the main factors alternative to primary industries that can contribute to regional development in many rural areas of the Nordic countries, helping create more sustainable, resilient and thriving communities. The regional development potential of tourism development is, therefore, highlighted as an important benefit of increased tourism in public policy in all of the Nordic countries. Discussion about these matters and the complexity of issues associated with it, is however only integrated in a limited number of the TDPs we examined. How to achieve synergies between tourism development and regional development is a prominent concern in a few TDPs but totally absent in others. Some TDPs have carefully made this connection and prioritise the need to ensure that any tourism development also becomes an asset for the local population, e.g. by contributing to other sectors, and thus encouraging more sustainable rural development. This can be related to the creation of infrastructure and/or activities that are attractive to use or attend for both visitors and local people; to attracting visitors to move (permanently, or only in their leisure time) into the area; to the attraction of venture capital and investment; to the building of a capable workforce; and to strengthening local identity and the attractiveness of a place. It also relates to effective collaboration between tourism operations and other sectors – for example between restaurants and local food producers, as part of the gastro-tourism trend. In cases where TDPs acknowledge and expand

the possible synergies between tourist development and regional development, they also tend to address how to balance positive economic development with possible environmental or social strains brought about by tourism. In this way, some TDPs from the rural Nordic regions have a more holistic view of sustainable tourism development—considering economic, environmental and social sustainability—while others tend to emphasise just the economic dimension at the cost of the other two.

Descriptive statistics show that the 85.5% of TDPs mention sustainability, and quite often 'sustainable tourism' is presented as the goal for future destination development. At the same time, the national tourism policies of all of the Nordic countries have sustainable development as an overarching theme. Despite this—the public and political awareness of the need for sustainable development when sustainability is increasingly becoming a competitiveness parameter in all industries—many TDPs (14.5%) do not even mention the word 'sustainability', while others only pay lip service to the concept. About one-fifth of TDPs (21%) mention sustainability concerns, but provide no further operationalising of the concept. Additionally, 13.5% of TDPs limit their sustainability discussions to economic dimensions, while just over half of them express concern about tourism development in terms of a strain on the environment or on social tolerance. At the same time, almost every TDP sets goals for economic growth within the tourism sector, either measured by increasing the number of overnight stays, increasing turnover in businesses, and/or increased indirect consumption created by tourism. The importance of using the concept of 'sustainability' is therefore well represented in the TDPs, but when it comes to utilising it, integrating it into plans and unlocking the full potential of tourism towards sustainable rural development, key aspects are often lacking.

Just over half (51%) of the TDPs analysed had a holistic approach to sustainability concerns (economic, social, and environmental aspects). Of those, approximately a third (21%) limited focus to direct tourism operators, whereas the rest (30%) included wider societal elements, bridging over from tourism into wider societal and developmental aspects. It should, however, be kept in mind that a wide variety of TDPs was included in the analysis. The exploration of visions and goals for tourism development was formulated by different actors at municipal, sub-regional and regional levels – sometimes by an institution, a consultancy firm or a small group of stakeholders, while on other occasions it was by a variety of actors. This fact is likely to influence the breadth of the focus of the plans highlighted, and our analyses show that the more participatory and inclusive processes for the development of a TDP is associated with a more holistic treatment of sustainability concerns in TDPs. A total of 28 out of the 33 TDPs that were classified as having the most holistic view on sustainability were developed through a broader, participatory process. In addition, having experienced the negative consequences of tourism and expressing these in a TDP was also shown to be associated with having a more holistic view of sustainability. All of the 13 TDPs that mentioned negative effects of tourism turned out to be classified as 'greener'—including social and environmental elements, in addition to the economic ones. Including both negative and positive aspects of tourism in a TDP therefore indicates a willingness to learn from past mistakes and to plan for better future development. However, it also highlights that others could learn from this and be pragmatic, by planning for possible negative effects in a proactive manner, instead of having to react after it hits.

Regarding national differences, the sub-national TDPs analysed for Denmark and Finland are the least green, reflecting the fact that Danish TDPs are those who most frequently omit to mention sustainability concerns altogether. Also, Finnish TDPs are the ones who most frequently mention sustainability concerns only with reference to the important national or international sustainability agendas. The TDPs from Sweden, Iceland and Norway are classified as being the 'greenest', in that in these countries, the majority of TDPs analysed address sustainability concerns in a holistic way (including economic, social and environmental concerns), with some or detailed operationalising and goalsetting at local level. This includes both TDPs which focus on sustainability concerns and activities within the tourism sector, and TDPs that include the interplay between tourism and wider societal developments in their sustainability concerns. For the latter group, Sweden has the highest number (and proportion) of TDPs.

Overall, it is surprising that sustainability concerns are not reflected on more in these rural, subnational TDPs. Sustainability concerns at the national and international level are considered the greatest challenge to our societies today, and as a result they are the greatest challenge to all industries, tourism included. At the same time, the image that a product is sustainable has become increasingly valuable and important in the minds of consumers. There may be many

different reasons why sustainability and sustainability concerns are incorporated and widened only to a rather limited extent in TDPs. One argument is that that sustainable development is not, and should not be, the prime concern of tourism actors who are naturally focusing on the viability of their business as the main issue. Nonetheless, it comes as a surprise when a TDP does not take a strategic view at a higher level than the individual tourism business. Its job is to formulate a roadmap for local tourism actors to collectively position the tourism destination positively within a wider vision of tourism development, by fully taking on board the positive effects and requirements of sustainable development. Other inhibiting factors, in part reflected in the TDPs themselves, are the complex interplay of interests and effects tourism has on different industries and on different aspects of society. This can be seen in the various discussions about the need for closer collaboration and coordination, and guidance towards the more sustainable development of tourism. While much of the longing for better cooperation is directed towards more public/private partnerships involving tourism stakeholders and the public authorities, some TDPs also highlighted the need for closer working relationships between different administrative levels.

Recent academic literature on tourism has emphasised a paradigm shift – one that highlights a new central role for tourism in local development, and in the regeneration of both regions and destinations. A key element in these findings is the need for tourism development to be planned and managed so that the original character and authenticity of destinations is preserved for future generations (Costa, Montenegro & Gomes, 2018). According to a recent Nordic review of policy instruments on tourism, nature and sustainability (Øien *et al.*, 2018), economic policy instruments are said to have somewhat limited applicability in the Nordic countries. Here the historic tradition of the 'right to roam' plays an important role, but measures like a tourist tax, increased VAT on typical tourist products, and user fees at nature attractions do not have sufficient political support (i.e. in Norway and Iceland). They are considered both impractical and costly. Another main finding of that study is that adaptive management approaches based on the inclusion of a wide range of stakeholders in planning processes should be implemented in the management of nature areas (*ibid*). Such approaches enhance the legitimacy of policy development, while including as many different aspects and opinions as possible should minimise constraints from either the economic, social or political dimensions of sustainability.

Our findings support this claim, both in the way that almost every TDP expresses longing for more collaboration and better coordination, but mainly by our comparison of how the TDPs were drawn up, and how those same documents were classified to address sustainability issues. Our results show that 85% of the TDPs that were classified 'dark green' (having a holistic view of sustainability) were developed through a broader participation process. Many Nordic regions have already implemented this kind of approach when developing tourism strategies. But even so, all of them want to emphasise the importance of more coordination and collaboration. TDPs that were developed by an institution, a consultancy firm or a small group of people also tended to express the need for better coordination and more cooperation, though more often than not for collective branding, rather than necessarily between the private and public sectors in destination planning. In some instances, the reasons for a small group of people developing a TDP might be a scarcity of funding to provide a holistic, multidisciplinary plan; and in other cases the local population might be unwilling to contribute their perspectives, or do not consider it beneficial due to a lack of trust within the community. Sometimes tourism stakeholders can also be selective as to whom they consider 'relevant stakeholders'. Our research does not and cannot hold all the answers as to how or why this varies between TDPs. Rather, our results pinpoint that it is a challenge, and that introducing a broad, participatory planning processes is essential to developing a successful tourism plan.

Prior research, and some of our key findings, point to the fact that the best way to facilitate cooperation, and to streamline a framework relevant to the tourism sector, is by involving as many different voices as possible. This also means involving different levels of administration from different parts of the public sector, since tourism involves not only several industries but also a cross-sectoral public structure. At the policy level, issues related to tourism are the responsibility of several ministries, regional government actors, and even local authorities. This makes it difficult for any public actor (national or regional) to have full control, oversight and responsibility for the tourism sector as a whole (Árnadóttir, 2019). Interrelating different national, regional and local plans that effect, or are affected by, tourism, integrating them with rural development plans, and then TDPs—this is not an easy task, but it is a necessary one for

further mobilising tourism development as a regional development tool. In addition, including a diverse group of stakeholders in the planning process should be encouraged to ensure broad inclusion of different aspects relevant to destination plans. This is the way to promote important issues, and it can contribute significantly towards a more sustainable type of development.

There is room for improvement in all this; especially if tourism in the Nordic rural areas is to transform itself into sustainable tourism, and also help rural Nordic tourism destinations develop in a more sustainable way. The focus in most of the TDPs analysed is on the numbers of visitors (possibly sub-divided or segmented into different types of tourists), the number of overnight stays, and the jobs created locally. Generally, the stated goals are to increase numbers for these three parameters. However, through a serious focus on the sustainable development of tourism, tourism has the potential to contribute to (or maybe even becoming a driving force behind) wider sustainable development in rural areas, especially if it focuses on the synergies between tourism development and rural community (destination) development. The academic literature on the subject identifies management as a key factor in facilitating this. The main findings of this report point in the same direction, since the key issue mentioned throughout Nordic rural TDPs is better coordination and more cooperation. To facilitate better coordination and cooperation, a management organ needs to be put in place—a platform that includes a variety of participants—to best emphasise that tourism development should serve the local community as regional development tool.

References

- Abrams, J.B., Bisnell, H., Gill, N.J., & Klepeis, P.J. (2012). Re-creating the rural, Reconstructing nature: An International Literature Review of Environmental Implications of Amenity Migration, *Conservation & Society*, 10(3), 270–284.
- Amore, A., Prayag, G., & Hall, C. M. (2018). Conceptualizing destination resilience from a multilevel perspective. *Tourism Review International*, 22(3), 235–250. <https://doi.org/10.3727/154427218X15369305779010>
- Árnadóttir, R. (2019), *Nordic tourism policy analysis*, Nord, Nordic Council of Ministers, Copenhagen K, <https://doi.org/10.6027/Nord2019-008>.
- Bauer, B., Watson, D., Gylling A.C. (2018). Sustainable Consumption and Production. An analysis of Nordic progress towards SDG12 and the way ahead. Nordic Council of Ministers, Copenhagen. <http://norden.diva-portal.org/smash/record.jsf?pid=diva2%3A1231011&dsid=6244>
- Bernard, H.R: 2002: Text Analysis II: Schema Analysis, Grounded Theory, Content Analysis, and Analytic Induction. Chapter 19 in *Research Methods in Anthropology. Qualitative and Quantitative Approaches*. Altamira, p. 429–457.
- Bramwell, B., and Lane, B. (2011). Critical research on the governance of tourism and sustainability. *Journal of Sustainable Tourism*, 19(4–5), 411–421.
- Bramwell, B., Higham, J., Lane, B., and Miller, G. (2017). Twenty-five years of sustainable tourism and the Journal of Sustainable Tourism: Looking back and moving forward. *Journal of Sustainable Tourism*, 25(1), 1–9.
- Bell, S., Simpson, S., Tyrväinen, L., Sievänen, T. and Pröbstl, U., eds. (2008). *European forest recreation and tourism: A handbook*, London: Taylor and Francis.
- Butler, R. (2018). "Challenges and opportunities", *Worldwide Hospitality and Tourism Themes*, 10(6), 635–641
- Broegaard, R.B., Larsen, K.T., & Larsen, L. (2018). Translocal communities and their implications for place branding. Chapter 9, 109–123, in Cassinge, C., Lucarelli, A., & Gyimóthy, S., (eds.) *The Nordic Wave in Place Branding – Poetics, Practices, Politics*. Edward Elgar Publishing.
- Brandolini, S. and Mosetti, R. (2005). Social Carrying Capacity of Mass Tourist Sites: Theoretical and Practical Issues about its Measurement. FEEM Working Paper No. 144.05.
- Costa, J., Montenegro, M. and Gomes, J. (2018), "What challenges and opportunities will lead to success?", *Worldwide Hospitality and Tourism Themes: Tourism in 2030*, 10(6), 631–634
- Council of Lapland. 2008. Tourism facts in Lapland. Statistical review 2008 http://www.lapinliitto.fi/c/document_library/get_file?folderId=20782&name=DLFE-603.pdf
- Dansk Kyst- og Naturturisme (2015). Vækststrategi for Kyst- og Naturturisme i Danmark—Kort fortalt. Notat. Aabybro.
- Font, X., & McCabe, S. (2017). Sustainability and Marketing in Tourism: Its contexts, paradoxes, approaches, challenges and potentials. *Journal of Sustainable Tourism*, 25(7), 869–883.
- Font, X., Elgammal, I., & Lamond, I. (2017). Greenhushing: the deliberate under communicating of sustainability practices by tourism businesses. *Journal of Sustainable Tourism*, 25(7), 1007–1023.
- Fredman, P & Tyrväien, L., (2010). Frontiers in Nature-Based Tourism, *Scandinavian Journal of Hospitality and Tourism*, 10(3), 177–189.
- Frisvoll, S. (2012). Power in the production of spaces transformed by rural tourism. *Journal of Rural Studies*, 28(4), 447–457. <https://doi.org/10.1016/j.jrurstud.2012.06.001>
- Frisvoll, S. (2018). Hele Norge skal leve? Når manglende kapasitet hemmer utvikling. Trondheim: Ruralis Institute.
- Gassen, N.S., Penje, O., & Slätmo, E. (2018) Global Goals for Local Priorities: The 2030 Agenda at

- local level. Nordregio Report 2018:2 retrieved at <http://norden.diva-portal.org/smash/get/diva2:1251563/FULLTEXT03.pdf>
- Granovetter, M.S. (1973). The strength of weak ties. *American Journal of Sociology*, 78(5), 1360–1380
- Gren, M., & Huijbens, E. H. (2014). Tourism and the Anthropocene. *Scandinavian Journal of Hospitality and Tourism*, 14(1), 6–22. <https://doi.org/10.1080/15022250.2014.886100>
- Grenier, A.A., & Müller, D.K., eds; (2011) *Polar Tourism: A Tool for Regional Development*. Presses de L'Université du Québec. Québec.CA
- Gyimóthy, S. (2017). The reinvention of terroir in Danish food place promotion. *European Planning Studies*, 25(7), 1200–1216
- Hall, C.M., Müller, D.K., & Saarinen, J. (2008). *Nordic Tourism: Issues and cases*. Channel View Publication.
- Hall, C.M. (2010). Changing Paradigms & Global Change: From Sustainable to Steady-state Tourism. *TOURISM RECREATION RESEARCH*, 35(2), 1–13
- Hall, C. M. (2019). Constructing sustainable tourism development: The 2030 agenda and the managerial ecology of sustainable tourism. *Journal of Sustainable Tourism*, 27(7), 1044–1060. <https://doi.org/10.1080/09669582.2018.1560456>
- Heleniak, T. and N. Sánchez Gassen (2019), *The Nordic Population in 2040: Analysis of Past and Future Demographic Trends*, Nordregio Reports, Nordregio, Stockholm, <https://doi.org/10.6027/R2019:6.1403-2503>.
- Helgadóttir, G., Einarsdóttir, A. V., Burns, G. L., Gunnarsdóttir, G. Þ., & Matthíasdóttir, J. M. E. (2019). Social sustainability of tourism in Iceland: A qualitative inquiry. *Scandinavian Journal of Hospitality and Tourism*, 2250. <https://doi.org/10.1080/15022250.2019.1696699>
- Hitchcock, M., King, V.T. and Parnwell, M.J.G. (1993). Tourism in South-East Asia: Introduction. In M. Hitchcock; V.T. King and M.J.G. Parnwell (eds) *Tourism in South-East Asia*. London: Routledge.
- Hillgrén A., Bröckl M., Descombes, L., Kontiokari V., and Halonen M. (2018). Nordic Best Practices. Relevant for UNEP 10YFP on Sustainable Tourism and Consumer Information. TemaNord 2016:546 <http://www.diva-portal.org/smash/record.jsf?pid=diva2%3A1044854&dsid=-1938>
- Hjalager, A.-M., Kwiatkowski, G., & Larsen, M. Ø. (2018). Innovation gaps in Scandinavian rural tourism. *Scandinavian Journal of Hospitality and Tourism*, 18(1), 1–17. <https://doi.org/10.1080/15022250.2017.1287002>
- Homewood, K., P. Kristjanson, and P. Trench, eds. (2009). *Staying Maasai? Livelihoods, Conservation and Development in East African Rangelands*. New York: Springer.
- Innovasjon Norge (2017) Towards Sustainable Travel and Tourism in Norway. A roadmap.
- James, L., Olsen, L.S., Karlsdóttir, A. (2020) Sustainability and cruise tourism in the arctic: stakeholder perspectives from Ísafjörður, Iceland and Qaqortoq, Greenland, *Journal of Sustainable Tourism*, 28:9, 1425–1441, DOI: 10.1080/09669582.2020.1745213
- Jensen, H. T., Plum, V., Hegelund, P., & Holmes, E. (2019). *Udkantsdanmark myte eller realitet? MOSPUS research paper*. Roskilde University, Institut for Mennesker og Teknologi.
- Kaltenborn, B.P., Haaland, H. & Sandell, K. (2001) The Public Right of Access – Some Challenges to Sustainable Tourism Development in Scandinavia, *Journal of Sustainable Tourism*, 9:5, 417–433, DOI: 10.1080/09669580108667412
- Karlsdóttir, A. Sánchez Gassen, N. Eds: Zhang, J., Kinnunen, J. & Katarina Fellman, K. (2020) *Regional Tourism Satellite Accounts for the Nordic Countries – Data compiling and description of approaches*. Nordregio, Stockholm.
- Korsgaard, S., Ferguson, R., & Gaddefors, J. (2015). The Best of Both Worlds: How Rural Entrepreneurs Use Placial Embeddedness & Strategic Networks to Create Opportunities. *Entrepreneurship & Regional Development*, 27(9-10), 574–598.
- Kull M, Refsgaard K, Sigurjonsdóttir H, Bogason Á, Wøien Meijer M, Sanchez-Gassen N, Turunen E (2020). *Attractive Rural Municipalities in the Nordic countries*. Nordregio, Stockholm.

<http://norden.diva-portal.org/smash/get/diva2:1411400/FULLTEXT02.pdf>

Landauer, M., Evan, M., Goodsite & Juhola, S. (2018) Nordic national climate adaptation and tourism strategies – (how) are they interlinked?, *Scandinavian Journal of Hospitality and Tourism*, 18:sup1, S75–S86, DOI: 10.1080/15022250.2017.1340540

Lee, Y.-S., Weaver, D. B., & Prebensen, N. K. (Eds.). (2017). *Arctic tourism experiences. Production, consumption and sustainability*. CABI.

Lemelin, H., Dawson, J., Stewart, E.J. (Eds.), 2013. *Last Chance Tourism: Adapting Tourism Opportunities in a Changing World*. Routledge.

Manniche, J., Larsen, K. T., Broegaard, R. B., & Holland, E. (2019). *Destination: A circular tourism economy*. A handbook for transitioning toward a circular economy within the tourism and hospitality sectors in the South Baltic Region. Centre for Regional and Tourism Research, Nexø. <http://cirtoinno.eu/ce-handbook>, <http://www.divaportal.org/smash/get/diva2:1247780/FULLTEXT01.pdf>

Miller, G., and Twining-Ward, L. (2005). *Monitoring for a sustainable tourism transition: The challenge of developing and using indicators*. Wallingford, Cabi Publishing.

Müller, D. K., & Ullrich, P. (2007). Tourism development and the rural labor market in Sweden, 1960–1999. In D. K. Müller & B. Jansson (Eds.), *Tourism in Peripheries: Perspectives from the Far North and South*. CABI.

Müller, D. K.. "Dynamic development or destined to decline?: The case of arctic tourism businesses and local labour markets in Jokkmokk, Sweden". In, *Tourism Destination Development: turns and tactics*/[ed] Viken, A; Granås, B, Farnham, UK: Ashgate, 2014, s. 227–244

Nordic Council of Ministers, Plan for Nordic Tourism Co-operation 2019-2023, Nordic Council of Ministers, Copenhagen, 2019. <http://norden.diva-portal.org/smash/record.jsf?pid=diva2%3A1330360&dswid=-7284>

Nordic Council of Ministers. (2013). *A Good Life in a Sustainable Nordic Region Nordic Strategy for Sustainable development 2013–2025*. Nordic Council of Ministers, Copenhagen. <https://www.norden.org/en/publication/good-life-sustainable-nordic-region-0>

Nordic Council of Ministers. (2017). *Generation 2030*. Nordic Council of Ministers, Copenhagen. <https://www.norden.org/en/information/generation-2030-nordic-programme-agenda-2030>

OECD (2020) Tourism Policy responses to the Coronavirus, retrieved at <https://www.oecd.org/coronavirus/policy-responses/tourism-policy-responses-to-the-coronavirus-covid-19-6466aa20/>

OECD (2020), A Territorial Approach to the Sustainable Development Goals: Synthesis report, OECD Urban Policy Reviews, OECD Publishing, Paris, <https://doi.org/10.1787/e86fa715-en>.

Ólafsdóttir, R., Sæþórsdóttir, A.D., Noordhuizen, J., & Nijkraak, W. (2018). Sustainable Leisure Landscapes in Icelandic Rural Communities: A Multidisciplinary Approach. *Journal of Management and Sustainability*, 8(4), 54–64.

Pechlaner, H., & Innerhofer, E. (2018). Linking destinations and resilience - challenges and perspectives. In E. Innerhofer, M. Fontanari, & H. Pechlaner (Eds.), *Destination Resilience. Challenges and opportunities for destination management and governance* (pp. 3–13). Routledge.

Rantala, O., et al. (2019), *Arctic Tourism in Times of Change: Seasonality*, TemaNord, Nordic Council of Ministers, Copenhagen K, <https://doi.org/10.6027/TN2019-528>.

Pechlaner, H., & Innerhofer, E. (2018). Linking destinations and resilience - challenges and perspectives. In E. Innerhofer, M. Fontanari, & H. Pechlaner (Eds.), *Destination Resilience. Challenges and opportunities for destination management and governance* (pp. 3–13). Routledge.

Robertsson, L., & Marjevaara, R. (2015) The Seasonal Buzz: Knowledge Transfer in a Temporary Setting. *Tourism Planning and Development*, 12(3), 251–265.

Saarienen, J. (2015). Conflicting limits to growth in sustainable tourism. *Current Issues in Tourism*, 18(10), 903–907.

- Saarinen, J. (2018). Beyond growth thinking: the need to revisit sustainable development in tourism. *Tourism Geographies*, 20(2), 337–340. <https://doi.org/10.1080/14616688.2018.1434817>
- Saarinen, J., & Varnajot, A., (2019) The Arctic in tourism: complementing and contesting perspectives on tourism in the Arctic, *Polar Geography*, 42:2, 109–124, DOI: 10.1080/1088937X.2019.1578287
- Simonsen, K (2019): Gastro Scandinavism: the branding of New Nordic Cuisine as a discursive space for forging new identities. In Cassinger, Lucarelli & Gyimothy (Eds): *The Nordic Wave in Place Branding. Poetics, Practices, Politics*. Elgar Publishing.
- Slätmo, E., et al. (2019), *Urban–Rural Flows from Seasonal Tourism and Second Homes: Planning challenges and strategies in the Nordics*, Nordregio Reports, Nordregio, Stockholm, <https://doi.org/10.6027/R2019:13.1403-2503>.
- Storrank, B. (2017), *Unlocking regional potentials: Nordic experiences of natural and cultural heritage as a resource in sustainable regional development*, TemaNord, Nordic Council of Ministers, Copenhagen K.
- Sutherland, D. and J. Stacey (2017), "Sustaining nature-based tourism in Iceland", *OECD Economics Department Working Papers*, No. 1422, OECD Publishing, Paris, <https://doi.org/10.1787/f28250d9-en>.
- Syssner, J., & Hjerpe, M. (2017). Swedish destination management professionals expectations of local governments. *Scandinavian Journal of Hospitality and Tourism*, 18(1), 524–541.
- Sæþórsdóttir, A.D. (2018) Challenges facing Nature Based Tourism in Iceland: Facing Overtourism while Fantasizing about Sustainability. Nordregio Forum, Lund SE, 28th November 2018.
- Sæþórsdóttir, A.D.; Hall, C.M.; Wendt, M.(2020) From Boiling to Frozen? The Rise and Fall of International Tourism to Iceland in the Era of Overtourism. *Environments* 2020, 7, 59.
- Tanvig, H. (2012). Nyt brug af land—nye landbrugere—integrerende iværksætteri i landdistrikter. Planlægning og Friluftsliv, Copenhagen: *Forest & Landscape*, Copenhagen University.
- Travis, A. S. (2011). Planning for tourism, leisure and sustainability: International Case Studies. Croydon, CPI Group.
- Tyrväinen, L., Silvennoinen, H., and Hallikainen, V. (2017). Effect of the season and forest management on the visual quality of the nature-based tourism environment: a case from Finnish Lapland. *Scandinavian Journal of Forest Research*, 32(4).
- United Nations—Sustainable Development knowledge platform. (2015). Transforming Our World: The 2030 Agenda for Sustainable Development. Retrieved January 18th, 2020 <https://sustainabledevelopment.un.org/post2015/transformingourworld>.
- United Nations Treaty Collection. (2016). Paris Agreement. https://unfccc.int/files/essential_background/convention/application/pdf/english_paris_agreement.pdf. Retrieved January 18th, 2020.
- UNWTO. (2019). World Tourism Organization. Tourism Highlights, , Edition 2019 <https://www.e-unwto.org/doi/pdf/10.18111/9789284421152>
- UNWTO. (2014) <https://www.unwto.org/sustainable-development>, retrieved 24. October 2019.
- Vargas-Sánchez, A., (2018) The unavoidable disruption of the Circular Economy in tourism. *Worldwide Hospitality and Tourism Themes—special issue: Tourism in 2030: what challenges and opportunities will lead to success?*, 10(6), 652–661
- Waltert, F., & Schlöpfer, F. (2010). Landscape amenities & local development: A review of migration, regional economic and hedonic price studies, *Ecological Economics*, 70(2), 141–152.
- Viken, A., & Nyseth, T.,(2009). Place Re-Invention Northern Perspectives. Abingdon on Thames: Routledge.
- Williams, Helena & Williams, Jr, Robert & Omar, Maktoba. (2013). Gastro-tourism as destination branding in emerging markets. *International Journal of Leisure and Tourism Marketing*. 4. 1–18. 10.1504/IJLTM.2014.059257.

World Bank (2018). Supporting sustainable livelihood through wildlife tourism. Retrieved at <https://openknowledge.worldbank.org/handle/10986/29417> World Commission on Environment and Development (1987). Our common future (Brundtland report) (A/42/427). United Nations, New York

Øian, H., Fredman, P., Sandell, K., Sæþórsdóttir, A.D., Tyrväinen, L., & Søndergaard Jensen, F. (2018), *Tourism, Nature and Sustainability: A Review of Policy Instruments in the Nordic Countries*, TemaNord 2018:534, Nordic Council of Ministers, Copenhagen K, <https://doi.org/10.6027/TN2018-534>.

Annexes

Annex 1: List of analysed tourism development plans (TDPs)

The following is a list of all included tourism development plans (TDPs) in the analyses of the report. The variety and types of documents was quite extensive, so for simplification when referencing, TDPs throughout the text are referred to by the name of their region/municipality and the years they cover.

Denmark

- Bornholms turismestrategi, 2017–2019
- Justeret strategi for turismen på Djursland, "Mere vækst gennem oplevelser", 2016–2018
- Turismestrategi 2013–2020, Frederikssund kommune, 2013–2020
- Erhvervs og Turismestrategi 2013–2018, Faaborg-Midtfyn kommune, 2013–2020
- Turismestrategi 2016–2020, Gribskov kommune, 2016–2020
- Turismestrategi og handleplan for Helsingørskommune, 2016–2020
- Ny turismefremmeindsats i Hjørring kommune, 2016
- Holstebro kommunes turismestrategi, 2013
- Turismepolitik for Kerteminde Kommune, 2015–2025
- Langeland kommune Turismestrategi frem, 2016–2021
- Turismestrategi i Lejre kommune, 2018–2020
- Strategi for fødevareproduktion og fødevareturisme på Lolland Falster, 2017–2020
- Turismestrategi for Lolland Kommune, 2017–2027
- Turismehandlingsplan 2016–2020. Ny vækst i turismen i Region Midtjylland, 2016–2020
- Mere af Fyn – 5-årig strategiplan. Masterplan for udvikling af turisme i Nordfyn kommune, 2014–2019
- Visit Nordjylland Vision 2020. Hvor skal nordjysk turisme hen? Afsæt og muligheder, 2007–2020
- Fælles retning i Nordjysk turisme, 2018
- Midtjylland. Analyse: Den regionale turismeindsats – de næste skridt, 2018
- Ringkøbing-Skjern Kommune. Naturens rige: Nye muligheder for fritid og turisme. Tillæg til Planstrategi, 2015
- Fælles retning for turismen i Region Sjælland, 2017
- Sjællands Vestkyst marketingstrategi, 2015
- Skagen-Fredrikshav-Sæby. Turismestrategi 2020. True feeling of Scandinavia, 2015–2020
- Skive kommunes turisme- og oplevelsespolitik, 2015–2018
- Svendborg kommuneplan (Turisme og værkst), 2017–2019
- Vækst gennem samarbejde - Syddansk Vækstforums handlings-og investeringsplan, 2016–2019
- Sydsjælland-Møn masterplan, Ny vækst i turismen, 2015–2020
- Udkast til turismestrategien for Varde kommune, 2013–2018
- Visit Vestjylland Strategi 2022 - tourisme image og kommunikation, –2022
- Genoplad. Vestsjælland marketingstrategi, 2017
- Aalborg All in 2017–2020. Strategi for VisitAalborg og Aalborgs turismeudvikling, 2017–2020

Finland

- Etelä-Karjalan matkailustrategia, "Taasha myö tavattii, tuutha sie vastakii", 2015–2020
- Etelä-Pohjanmaan matkailustrategia, 2013–2017
- Haminan matkailuohjelma, 2015–2020
- Hanko–Hangon kaupungin matkailustrategia, 2012–2020
- Kainuun matkailustrategia, 2011–2020

- Keski-Suomen matkailustrategia, 2013–2020
- Kouvolan matkailun master plan ja investointistrategia, 2017–2025
- Lapin matkailustrategia, 2015–2018
- Länsi-Uudenmaan matkailustrategia. 2013–2020
- Naantalin Kaupungin matkailustrategia, 2011
- Oulun toimenpideohjelma, Seudun matkailustrategia, 2018–2023
- Pohjois-Karjalan matkailun teema—Ja toimenpideohjelma, 2014–2020
- Pohjois-Pohjanmaan matkailuelinkeinon kehittämisstrategia, 2014–2020
- Matkailustrategia Savonlinnissa, 2016–2021
- Pyhäjärven matkailusuunnitelma, Kehityskohteet ja toimenpiteet matkailun kasvuun, 2014–2020.
- Päijät-Hämeen matkailu Lahti, Tahto ja tekemistä!—Ja tapahtumastrategia, 2016–2025
- Satakunnan matkailun tavoite—Ja toimenpidesuunnitelma, 2012–2020
- Suomenlinnan kestävä matkailun strategia, 2015
- Sustainable Tourism Development Strategy 2011 for Kvarken Archipelago World Heritage Site, 2011
- Varsinais-Suomen matkailuohjelma, 2013–2020
- Tampereen matkailun strategia, 2020–2025

Iceland

- Austurland—Áfangastaðaaðætlun—Action Austurland—Destination Management Plan, 2018–2021
- Norðurland—Okkar áfangastaður—Áfangastaðaaðætlun, 2018–2021
- Reykjanes—Áfangastaðurinn Reykjanes—Þróun ferðamála í sátt við náttúru og samfélag, 2018–2021
- Suðurland—Áfangastaðaaðætlun—DMP á Suðurlandi, 2018–2020
- Vesturland—Áfangastaðaaðætlun, 2018–2020
- Vestfirðir—Áfangastaðaaðætlun, 2018–2020
- Skagafjörður—Stefnumótun í ferðaþjónustu, 2016–2020

Norway

- Besøk Agder, 2015–2030
- Først mot framtiden, Sluttevaluering regional delplan reiseliv, Buskerud, 2010–2016
- Berekraftig Telemark—regional planstrategi, 2016–2020
- Cruisestrategi for Vestlandsregionen, 2016–2020
- Felles reiselivsstrategi for Vestlandet, 2013–2020
- Finnmark fylkeskommunes reiselivssatsing, 2016 (a short presentation of an unpublished draft version)
- Finnmark Regional planstrategi, 2016–2019
- Hedmark fylkeskommunes reiselivsstrategi, 2010
- Lærdal reiselivsstrategi 2011–2015
- Midt-Troms reiselivsstrategi 2013–2017
- Nordland fylkeskommune: Strategi for reiseliv- og opplevelsesnæring, 2017–2021
- Regional delplan for reiselivet i Buskerud, 2010–2016
- Regional plan for opplevelsesnæringene i Hedmark, 2012–2019
- Reiselivsplan Sogn og Fjordane, 2010–2025
- Reiselivsstrategi for Rogaland, 2013–2020
- Reiselivsstrategi Ytre Namdal, 2013–2020
- Reiselivsstrategi Tinn kommune, 2018–2029
- Reiselivsstrategi Aust & Vest Agder, 2006–2010
- Reiselivsstrategi Oppland fylkeskommune. 2013
- Reiselivsstrategi Trøndelag, 2008–2020
- Sogn og Fjordane Fylkeskommune Reiseliv Handlingsplan, 2010–2025
- Telemark—Regional plan for reiseliv og opplevelser, 2011–2024

Sweden

- Besöksnäringstrategi Östergötland "Långsiktig framgång kan man inte skapa ensam", Region Östergötland, 2016
- Blekinge, Strategi för besöksnäringen, Region Blekinge & Länsstyrelsen Blekinge Län,
- Dalarnas Besöksnäringstrategi, 2018–2030
- Besöksnäringstrategi För Gävleborg 2009–2020, Region Gävleborg, 2009–2020.
- Regional besöksnäringstrategi för Gotland 2017–2027, Region Gotland, 2017–2027.
- Jämtland/Härjedalen 2030, Innovativt & Attraktivt regional utvecklingsstrategi 2014–2030, Regionförbundet Jämtlands län, 2014–2030
- Besöksnäringstrategi 2019–2030, Strategi för en hållbar besöksnäring i Bergs kommun till år 2030
- Masterplan för besöksnäringen i Kiruna Swedis Lapland, 2015–2020
- Lerums kommun turismstrategi, 2018–2022
- Lokal strategi för besöksnäringen i Ljusdals kommun, 2015–2020
- Hur mår besöksnäringen i Norrbotten?, Region Norrbotten, Länsstyrelsen i Norrbottens län, 2017–(2027)
- Regional Development Strategy for a Sustainable Future in Norrbotten, 2020
- Turismstrategi Oskarshamn, Oskarshamn kommun, 2016–2025
- Nynäshamn Besöksnäringstrategi, Nynäshamn kommun, 2017
- Strategisk plan för turismen och besöksnäringen i Skåne 2020, Consultants for Strategic Futures, 2012–2020
- Strategi för besöksnäringen i södra Småland, 2013–2020
- Sörmlands strategi för en hållbar besöksnäring, 2013–2023, Regionförbundet Sörmland,
- Halmstad Strategi 2030, Destination Halmstad, 2019–2030.
- Besöksnäringstrategi i Söderköpings kommun 2017–2020, Söderköpings kommun,
- Plan för turism och besöksnäringen i Tyresö 2018–2020, Tyresö kommun, 2018–2020
- Strategi för en hållbar besöksnäring i Uppsala län till år 2020, 2013–2020
- Tillväxtsstrategi för Västernorrlands besöksnäring, Landstinget Västernorrland,
- Turismstrategi 2020 Västerviks kommun, 2013–2020
- Strategi för besöksnäringen i Värmdö, 2012–2020.
- Strategi för Värmlands besöksnäring 2014–2020,
- Regional strategi för besöksnäringen i Västerbotten 2016–2020

Åland

- Turismstrategi för Åland 2012–2022

Faroe Islands

- Ferðavinna í Føroyum - Ein ábyrgdafull og burðardygg leið, 2017

Greenland

- Sektorplan for havnene i Grønland 2016–2026
- Turismeudvikling i Grønland Hvad skal der til? 2016–2020

Annex 2: List of classifications used for coded material

The following list of characteristics were used when coding the tourism development plans from the rural Nordics. The list contains characteristics or attributes, which apply for the full document. This distinguishes the classifications from the variables, which are used for coding text-sequences within documents. Green indicates pre-defined attributes; blue indicate emergent attributes to code for.

- Lifespan of strategy document
 - Short-term, Up to 4 years,
 - Medium term, 5–8 years
 - Long term, 9+ years
- Phase in tourism development
 - Emerging
 - In development
 - Peaking
 - Post-peak
- Experienced negative consequences of tourism
 - Not, somewhat, much
- Administrative level (of strategy)
 - National/regional/sub-regional (multiple municipalities)/municipal
- Area classification
 - Type 1–5 within the Nordregio Urban-rural classification
- Border region
 - Yes/no (include borders by water bodies).
- Country
 - Denmark/Sweden/Norway/Finland/Iceland/Greenland/Faroe Islands/Åland
- Cruise tourism?
 - Yes/no
- Predominant tourism segment in region
 - Nature
 - Nature & Culture combined
 - Culture
- Importance of tourism in local economy relative to national average
 - Lower/higher or on average [based on latest actual data provided]
- Contribution to job creation (of tourism) relative to national average
 - Lower/higher or on average [based on latest actual data provide]
- Small and family owned companies characterizing the area?
 - Yes, small & family owned
- TDPs development process (participation process)
 - Institutionally led process, with very limited participation and inputs of people outside thereof.
 - Consultancy led process, with very limited participation and inputs of people outside thereof.
 - Broader participation, with key commercial tourism operators.
 - Broad participation, with key commercial tourism operators and local representatives of civil society organizations, volunteers, etc.
- Sustainability concerns
 - Dotted: No mentioning of sustainability in the TDP. If no text-bits are coded under 'sustainability concerns', an additional word-search was carried out in Nvivo.
 - Grey: Sustainability mentioned in the TDP as a reference to national or international goals, but not operationalized or integrated further.
 - Greyish green: Sustainability concerns mentioned in TDP with regards to economic sustainability or viability of tourism businesses.
 - Light green: Sustainability concerns mentioned and elaborated on, including economic, social, and environmental aspects thereof, and some operationalization with respect to the tourism sector
 - Dark green: Sustainability concerns mentioned and elaborated on, including economic, social, and environmental aspects thereof, and some operationalization with respect to the tourism sector and sectors outside thereof.

Annex 3: National level analysis of frequency of code use in TDPs

Annex 3 presents a detailed analysis of the frequency of variable use at national level. Looking more closely into individual countries, and how the variables are represented in the sub-national tourism strategies and other relevant policy documents, a rough picture of the priorities of sub-national tourism development plans in a particular country can be painted. In the charts in the following chapters, the individual variables that are mentioned at least once in a TDP are represented in descending order for each country. The charts show the percentage of TDPs in each country that mention a specific variable one or more times, starting with those brought up most often, and then to those mentioned least.

Denmark

In Denmark, a total of 30 TDPs at regional, sub-regional and municipal level were included in the research. The documents varied in terms of length, content, duration time of their validity and some had specific thematic focus while others were more general. The following chart shows how the individual variables are represented in the TDPs of Denmark in a descending order. The chart presents the percentage of TDPs in Denmark that mention a specific variable one or more time.

Chart 8.1: Variables in order of code frequency in TDPs from Denmark, where a variable is at least mentioned once in a document.

The code frequency of variables in Denmark shows that 'coordination and collaboration internally' is brought up in 93.5% of the TDPs, and that 80% mention 'expectations to growth' and close to 75% 'secure local benefits'. From this the need for more cooperation among different actors in relation to tourism is the variable that is coded in most of the Danish TDPs, while local economic expectations come closely behind. The variables concerning 'tourist origin', 'education and competence building', 'endogeneity/authenticity', 'expectations to local job creations' and 'gastro-tourism' then appear in 72.5%–65% of the TDP in Denmark followed by 'challenges', 'seasonality and extended season' which are both just under 60%. 'Nature oriented tourism' and 'secure added value in other sectors' are brought up in just over 50% of TDPs in Denmark while 'in-migration and attraction of new population', 'nature protection and reserves' and 'sustainability concerns' are only mentioned in around 45% of the tourism policies. Just over 30% have mentions of 'functional tourism regions' and just over 20% bring up 'the right to roam'.

'Natural resource management', 'cruise tourism' and 'user groups' are only present in around 15%. Discussions or mentions of 'avoid negative impacts' and 'experienced negative impacts' in relation to tourism were however not coded for in none of the 30 Danish TDPs.

Finland

A total of 21 TDPs from regional, sub-regional and municipal administrative levels were included from Finland. In the material from Finland the variable on 'sustainability concerns' is the one that is mentioned in most of the TDPs, 79% of the total TDPs have at least one mention of that while a little fewer, 77%, bring up the need for further 'coordination and collaboration internally'. Behind those variables a total of eight variables are mentioned in 73% of the Finish TDPs; 'expectations to growth', 'tourist origin', 'education and competence building', 'endogeneity/authenticity', 'challenges', 'seasonality and extended season', 'nature oriented tourism' and 'functional tourism regions'. Close behind is 'gastro tourism' that is present in some form in 68% of the TDPs followed by 'secure local benefits' and 'user groups' which are brought up in 59%. At first sight, the distribution of variables in the Finish TDPs is quite even where sustainability concerns and keeping authenticity seem an important issue along with the need for more coordination and addressing challenges while still expecting growth and addressing seasonality issues.

Chart 8.2: Variables in order of code frequency in TDPs from Finland, where a variable is at least mentioned once in a document.

Looking further into the distribution in Finland reveals that the variables on 'expectations to local job creations' and 'secure added value in other sectors' are mentioned in 55%, while 'nature protection and reserves' stands at almost 50% and 'natural resource management' at 45%. The variables that are mentioned in the fewest TDPs in Finland are however 'cruise tourism' which is present in 27%, 'in-migration and attraction of new population' and 'avoid negative impacts' are brought up in 18% of the material while only 9% mention 'experienced negative impacts' and 5% have some mentions of 'the right to roam'.

Iceland

For Iceland a total of six regional destination management plans were included in the dataset of TDPs along with one municipal tourism strategy. Iceland sticks out from the other countries in the way that half of the variables coded for, a total of 11, appear at least once in every TDP included in the dataset. The variables 'coordination and collaboration internally', 'expectations to growth', 'tourist origin', 'expectations to local job creations', 'gastro tourism', 'challenges', 'nature oriented tourism', 'nature protection and reserves', 'sustainability concerns', 'user groups', 'avoid negative impacts' are present in some form in every TDP while 'secure local benefits', 'seasonality and extended season', 'secure added value in other sectors' and 'nature protection and reserves' are mentioned in six of the seven TDPs.

Chart 8.3: Variables in order of code frequency in TDPs from Iceland, where a variable is at least mentioned once in a document.

This seemingly thorough coverage (and even spread) of different variables coded in the Icelandic TDPs is most likely the result of the Icelandic Tourism Board leading the work of developing regional destination management plans for the entire country in 2018. The result of this work was detailed DMPs for each region, and the project management was led and guided by the same stakeholders, thus ensuring that certain topics were discussed and included in the development process of each DMP. That process, along with the fact that there are only seven TDPs in total, compared with 21–30 from other Nordic countries, is likely to contribute to the even and detailed distribution of variables in the Icelandic material.

The topics that were not mentioned at least once in every TDP from Iceland were 'cruise tourism' and 'the right to roam', which were brought up in five out of seven, while 'functional tourism regions', 'endogeneity/authenticity', 'in-migration and attraction of new population' and 'experienced negative impacts' are mentioned in four out of seven TDPs in Iceland. Increasing 'education and competence building' through tourism is the least mentioned variable in the Icelandic material, which just three out of a total of seven TDPs bring up.

Norway

For Norway a total of 22 TDPs were included in the research, of which 18 were regional, two sub-regional and two municipal. As with most of the other Nordic countries, the topics that appears in most of the TDPs is the need for further 'coordination and collaboration internally' in the tourism sector. This variable is in fact brought up in each and every one of the 22 TDPs in Norway followed by 'challenges', 'seasonality and extended season' and 'nature oriented tourism' which are present in 21 of the 22. The variables of 'secure added value in other sectors' and 'sustainability concerns' are brought up in almost 90% while 'secure local benefits' and 'education and competence building' are mentioned in around 85%. The topics of 'gastro tourism' is in some form in almost 80% of the Norwegian TDPs followed by 'endogeneity/authenticity', 'expectations local jobcreation' and 'right to roam (allemands-rätt-commons)', which are covered in just over two-thirds.

First impressions from looking over the distribution of variables in the Norwegian material suggest that discussions of challenges, seasonality issues, securing added-value in other sectors than direct tourism, and securing local benefits, are more prominent than in some of the other countries. Discussions on 'expectations to growth' are nonetheless also quite highly ranked. Like mentions of 'tourist origin', they are covered in over 60% of TDPs from Norway. 'Nature protection and reserves' is then included in a little over 50% of them.

Chart 8.4: Variables in order of code frequency in TDPs from Norway, where a variable is at least mentioned once in a document.

Looking at variables that are less equally distributed among the TDPs in Norway indicates that 'in-migration and attraction of new population' through tourism is present in 37%, while discussions on 'natural resource management' and 'cruise tourism' are covered in some form in just over 30% of TDPs. 'Avoid negative impacts' and 'functional tourism regions' are mentioned in around a quarter, but the least-raised themes in Norway are 'experienced negative effect of tourism', at the 20% mark, and 'user groups', which is only mentioned in 16%.

Sweden

For Sweden a total of 26 TDPs were included. Most of them, 14 in all, were at the regional administration level, while two were sub-regional and nine were municipal. As with most of the other countries, the most common variable coded for was the need for 'coordination and collaboration internally' which was covered in just over 80% of cases, while 'nature oriented tourism' was mentioned in 71%. Closely behind were 'sustainability concerns', which just over two-thirds addressed. 'Expectations to growth' were brought up in close to 60% of plans, while 'endogeneity/authenticity', 'tourist origin' and 'functional tourism regions' were mentioned in just under 60%. About half of the material mentions 'challenges', 'secure local benefits', 'education and competence building' and 'gastro tourism' while just under 50% bring up 'expectations to local job creations' and 'secure added value in other sectors'. About half of the material mentions 'challenges', 'secure local benefits', 'education and competence building' and 'gastro tourism' while just under 50% bring up 'expectations to local job creations' and 'secure added value in other sectors'.

Chart 8.5: Variables in order of code frequency in TDPs from Sweden, where a variable is at least mentioned once in a document.

The variables that were coded most seldomly were 'nature protection and reserves' and 'natural resource management', which are placed on each side of the 30% mark; while 'the right to roam' and 'user groups' are mentioned in just over a quarter of TDPs. Using tourism for encouraging 'in-migration and attraction of new population' is present in some form in just over 20% of the Swedish TDPs, while only 14% raise 'avoiding negative impacts'. Two variables were not coded for at all in the Swedish material—'cruise tourism' and 'experienced negative effect of tourism'.

Annex 4: Frequency of coded material—comparison within each Nordic country

The charts in this annex present the individual variable values in bars, in a descending order, calculated as a proportion of the overall frequency of codes for that country's TDPs. For example, if all the coded nodes in a country amounted to a 1,000, and 200 of those coded were the node about 'expectations to growth', that would be 20% of the overall coding for that country. The cumulative total is then represented by the orange line.

Denmark

Taking a closer look at all the coded material for Denmark reveals that 16.4% of the coded material was in some way concerned with the need to secure better 'coordination and collaboration internally' when it comes to tourism affairs. This is more than twice as much the next variable, 'education and competence building', which stands at 7.9%, and 'endogeneity/authenticity', which covers 7.8% of coded material. Close behind stand the topics of 'expectations to growth', 'secure local benefits' and 'secure added value in other sectors'. 'Challenges' covers 6.2% and 'gastro tourism' 5.3% in Denmark; and then 'tourist origin', 'nature oriented tourism', 'expectations to local job creations', 'seasonality and extended season', 'in-migration and attraction of new population', 'nature protection and reserves' and 'sustainability concerns' cover between 4.7% and 3.6%.

Chart 8.6: Pareto chart for TDP variables in Denmark, shown in a descending order and calculated as a proportion of the overall frequency of codes.

The variables that are the least mentioned in the overall frequency of codes in TDPs in Denmark are, however, 'functional tourism regions' at 2.3%, 'the right to roam' at just 1.5%, and then 'cruise tourism', 'user groups' and 'natural resource management' which only cover 1–0.8% of coded material. 'Avoiding negative impacts' and 'experienced negative effect of tourism' are not mentioned at all in the Danish material.

Finland

In Finland, as with Denmark, the most prominent discussions, according to the proportion of the overall frequency of codes in TDPs, are about 'coordination and collaboration internally'. In Finland this covers 17.3% of the overall coded material, while 'functional tourism regions' comes second, covering 10.8%. 'Nature oriented tourism' and 'nature protection and reserves' make up 8.6% and 8.2% respectively, while 'tourist origin' and 'education and competence building' each account for 7%. 'Seasonality and extended season' represent 6.5% of the variables coded for Finland, while other topics cover less space. 'Expectations to growth', 'endogeneity/authenticity', 'challenges' and 'sustainability concerns' all lie between 4.9%–4.4%.

Chart 8.7: Pareto chart for TDP variables in Finland, shown in a descending order and calculated as a proportion of the overall frequency of codes.

'Natural resource management' and 'secure local benefits' in the Finish TDPs are at 3.2% and 3.1% while 'user groups' and 'gastro tourism' cover 2.1% and 2%. The variables that take up the least space from the overall proportion of codes in Finland are 'secure added value in other sectors' with 1.4%, 'avoid negative impacts' with 1.3%, while 'expectations to local job creations' lies at just under 1% of the total codes. The variables of 'in-migration and attraction of new population' and 'cruise tourism' cover around half a percent each, while 'experienced negative effect of tourism' is only 0.2% of the total coded variable proportion in Finland, and 'the right to roam' is 0.1%.

Iceland

When looking at the frequency of coded variables in Iceland as a proportion of overall codes, Iceland is the only country that does not have an overwhelming majority of its discussion fall under the variable 'coordination and collaboration internally', unlike the other four countries. While coordination is important to Icelanders, as for others in future tourism development, the variable only lies third, and covers just 8.4% of coded material. The most mentioned variable in Iceland, however, is 'challenges', which makes up no less than 21.2% of the entire coded variables. Sustainability concerns are the second most prominent variable, according to the statistics, with 9.8% coverage. This can probably be related to the exponential growth in tourism in the past decade, causing pressure on both infrastructure and natural environments, and causing different challenges related to tourism to become an established part of public debate. The variables that place themselves not far behind the ones already mentioned are 'nature oriented tourism' and 'avoiding negative impacts', both near the 7.5% mark.

Chart 8.8: Pareto chart for TDP variables in Iceland, shown in a descending order and calculated as a proportion of the overall frequency of codes.

Both 'the right to roam' and 'secure local benefits' cover just over 5% in the Icelandic TDPs, while 'nature protection and reserves', 'gastro tourism', 'seasonality and extended season' and 'cruise tourism' cover between 4.6%-4.2%. The more local economic benefit-related variables around 'expectations to growth' and 'secure added value in other sectors' are then 3.7% and 3.3% of coded variables in Icelandic TDPs, while 'tourist origin' and 'expectations to local job creations' cover some 2.5% each. Discussions on 'experienced negative effect of tourism' only cover about 1.5% of the codes in Iceland, while 'natural resource management', 'education and competence building', 'endogeneity/authenticity' and 'in-migration and attraction of new population' are all around the 1% mark. The two least prominent variables of the coded material from Iceland are 'user groups', with just 0.3%, and 'functional tourism regions', with 0.1%.

Norway

Norway, like their Nordic neighbours, has 'coordination and collaboration internally' as the variable that covers proportionally the most of coded TDPs, with around 12.4%. The distribution among the different variables in the Norwegian material is, however, a little more even than the other countries, with 'sustainability concerns', 'expectations to growth', 'challenges' and 'secure local benefits' covering 8.5%–7.5% of the codes. Shortly behind these come the variables concerning 'education and competence building', 'user groups', 'cruise tourism' and 'nature oriented tourism', which cover from 6.6%–5.8%. The variables about 'secure added value in other sectors', 'expectations to local job creations' and 'seasonality and extended season' then cover between 4.4%–4%.

Chart 8.9: Pareto chart for TDP variables in Norway, shown in a descending order and calculated as a proportion of the overall frequency of codes.

The variables that cover the least proportion of codes in Norwegian TDPs are 'endogeneity/authenticity', 'gastro tourism', 'tourist origin', 'the right to roam' and 'natural resource management', which cover between 2.8%–2.2%. The very last of the coded material is then covered by 'experienced negative effect of tourism', which is at 1,6%, 'nature protection and reserves', with .1%, and 'in-migration and attraction of new population', at 1%, followed by 'functional tourism regions' and 'avoid negative impacts' with less than 1% each.

Sweden

Viewing the coded material for Sweden reveals that 18.6% of the coded material is in some way about the need to secure better 'coordination and collaboration internally'. Like most other countries, this is the coded variable that takes up the most space in Swedish TDPs. Far behind that comes the discussion which covers 'sustainability concerns', at 9.2%, and further behind come the variables related to 'expectations to growth', 'nature oriented tourism', 'seasonality and extended season', 'challenges', 'education and competence building' and 'endogeneity/authenticity', which cover between 7.8%–6.7% each.

Chart 8.10: Pareto chart for TDP variables in Sweden, shown in a descending order and calculated as a proportion of the overall frequency of codes.

Looking at the coded variables which take up less space than the aforementioned ones reveals that 'tourist origin' and 'secure local benefits' are placed at 4.7% and 4.5%, while 'expectations to local job creations' covers 3.8%, 'functional tourism regions', 3.4%, and 'secure added value in other sectors', 3.2%. 'Nature protection and reserves' then amounts to 1.9%, and 'the right to roam', 'user groups', 'avoid negative impacts' and 'natural resource management' all take up less than 1% each. There was nothing coded for 'cruise tourism' nor 'experienced negative effect of tourism' in Swedish TDPs.

Faroe Islands

Since the statistical data presented in this part of the research describes the frequency of coded variables in TDPs, it is possible to include the Faroe Islands, which otherwise only has one valid document included in the research. The national tourism strategy for the Faroe Islands is quite detailed and, at least from looking at the coded variables, prioritises different topics compared to many of the other Nordic countries. The variable that was coded for most often in the Faroese tourism strategy was 'the right to roam', which covers close to 16.1%; while 'sustainability concerns' follow not far behind with 15%. Discussions on 'securing local benefits', 'challenges' in relation to tourism development and 'nature protection and reserves' come next, with 9–7.8% of the total coded variables. From this it could be assumed that discussions and concerns about preservation of nature, at least as they are presented in the tourism strategy, are quite dominant. 'Avoiding negative impacts' covers 6%, while 'cruise tourism' is at 5.4%.

Faroe Islands—calculated as a proportion of the overall frequency of codes

Chart 8.11: Pareto chart for TDP variables in Faroe Islands, shown in a descending order and calculated as a proportion of the overall frequency of codes.

The Faroe Islands tourism strategy also discusses 'coordination and collaboration internally', much like the other Nordic countries, although it only covers 4.2% of coded variables, while 'nature oriented tourism' and 'expectations to growth' sit at around the same value. 'Securing added value in other sectors', 'education and competence building', 'natural resource management' and 'seasonality and extended season' are discussions that amount to just over 3% in the Faroese TDP, while 'expectations to local job creations' and 'gastro tourism' are just under 2%. Each covering 1.2% are those variables related to 'experienced negative effect of tourism' and different tourism 'user groups', while the least-mentioned ones are 'endogeneity/authenticity' and the variable about 'tourist origin', with 0.6% of the coded material each. Nothing was coded for two variables in the Faroese TDP, 'functional tourism regions' and the use of tourism for 'in-migration and attraction of new population'.

Greenland

Two documents were included in the dataset for Greenland in this research. The national tourism strategy of Greenland, along with a sectoral plan on harbour issues, which covers some tourism-related issues that are mainly related to cruise tourism. Understandably so, and because of lack of other transport opportunities in Greenland, the 'cruise tourism' variable covers proportionally just 10% of the material coded in Greenland's TDPs. The most-coded variable was, however, 'secure local benefits', at 14.1%, while 'challenges' and 'expectations to growth' stand at nearly 11%. Cruise tourism, as mentioned earlier, is then at 10%, while 'coordination and collaboration internally' covers 9.4%. Those five variables, of the total 22 coded for, therefore collectively cover more than half of the variables coded for Greenland.

Discussions on 'expectations to local job creations', 'experienced negative effect of tourism', 'secure added value in other sectors', 'nature protection and reserves' and 'the right to roam' jointly amount to about 25% of the total coded variables, with around 5% for each one.

Chart 8.12: Pareto chart for TDP variables in Greenland, shown in a descending order and calculated as a proportion of the overall frequency of codes.

Discussions on the remaining 12 variables account for remaining 20% of the coded material, where 'endogeneity/authenticity' and 'nature protection and reserves' are at 2.9% each, 'education and competence building' and 'tourist origin' are at 2.3%, and 'functional tourism regions', 'in-migration and attraction of new population' along with 'seasonality and extended season' stand at 1.7%. The least-mentioned variables, proportionally, in the Greenland TDPs were 'avoid negative impacts' and 'natural resource management', at 1.2% each, while 'gastro tourism' and 'user groups' only cover 0.7% of the total coded variables in Greenland. What is interesting, and different from the other Nordic countries, is that 'sustainability concerns' is also among the variables least mentioned in Greenland's TDPs, only covering 0.7% of them.

Åland

Åland's tourism strategy, like the other autonomous regions, also sticks out a bit, in comparison to the Nordic countries, when it comes to the proportion of the overall coded variables. Åland's proportionally most-coded variable is 'user group', which covers 17% of the total material. The variables 'coordination and collaboration internally' and 'expectations to growth' come second and third, with 14% and 13% respectively. Issues about 'seasonality and extended season' then cover 9% of the coded variables, and 'education and competence building' amount to 8.2%. Together, those five variables equate to more than 60% of all coded variables for Åland. However, it should be noted that there is only the single document to refer to, and it is quite concentrated on specific issues, which is reflected in the descriptive statistics of coded variables.

Other variables that were coded for in the tourism strategy of Åland were 'nature-oriented tourism', covering 7%, and 'secure added value in other sectors', which covers 5.3% of the variables coded. Thereafter, discussions on 'expectations to local job creations' and 'gastro tourism' both amount to 4.2% of the material each.

Chart 8.13: Pareto chart for TDP variables in Åland, shown in a descending order and calculated as a proportion of the overall frequency of codes.

In Åland's tourism strategy, 'challenges' are discussed along with the variables that were named 'functional tourism regions', 'cruise tourism', 'endogeneity/authenticity', 'secure local benefits' and 'sustainability concerns'. Each of these cover between 2.9% and 2.3%. It should also be noted that the tourism strategy of Åland dates from 2012, and since then it has been briefly updated, with references to a separate 'sustainability strategy'. The least-mentioned variables, according to the proportional coding statistics, were then 'in-migration and attraction of new population', 'nature protection and reserves' and 'tourist origin'. However, the variables concerning 'the right to roam', 'natural resource management', 'avoid negative impacts' and 'experienced negative effect of tourism' was not coded for in the Åland tourism strategy.

Annex 5: National differences within 'sustainability concerns' in TDPs

This annex expands a little more on national differences regarding the frequency with which a TDP mentions 'sustainability concerns' (i.e. that a text-section in the TPD has been coded under this variable at least once). A closer look reveals that some national differences stand out. Sustainability concerns are mentioned in all of the (seven) Icelandic TDPs analysed, followed by Norway and Finland, where just under 90% and just under 80% of the TPDs (respectively) mention sustainability concerns. At the other end of the spectrum, Denmark stands out as having sub-national TDPs of which only just over 40% mention sustainability concerns. For Sweden, the comparable figure is just below 60% (See Chart 3.2).

When looking at the frequency with which the sustainability concerns variable has been employed in each set of national material, a slightly different picture emerges. While the sustainability concerns variable is the fourth most used among all coded text-elements (see chart 3.3), the Icelandic, Norwegian and Swedish TPDs stand out as countries where the sub-national TDPs have the highest frequency of use of the sustainability concerns-variable (at 9.8%, 8.5% and 9.2 % of all coded text-elements, respectively). Furthermore, the TDP from the Faroe Islands (available only at national level) stands out as being the country with the most frequent use of the sustainability concerns variable in its material, with sustainability concerns representing 15% of all codes used. For all four countries, the sustainability concerns variable is the second most frequently employed variable in the coding of the material.

The subnational TDPs from Finland and Denmark contain considerably less frequent mention of sustainability concerns. In the Finnish sub-national TDPs, 4.8% of the nodes used relate to the sustainability concerns variable, representing the tenth of 22 used variables (see chart 8.7 in Annex 4). In Danish sub-national TDPs, it is only 4.1% of the material that is coded under the sustainability concerns variable, representing the twelfth of 20 used codes (see chart 8.6 in Annex 4). At the other end of the spectrum is Greenland (less than 1% of nodes; second least frequently used variable), and Åland, where just over 2% of coded material is regarding 'sustainability concerns', representing the tenth of 17 variables used (see chart 8.13 in Annex 4).

Annex 6: Distribution of Nordic rural TDPs by sustainability concern type, and whether negative consequences from tourism are mentioned

Annex 6 zooms in on the distribution of TDPs in each Nordic country, and whether they report having experienced the negative consequences of tourism by sustainability concern type. It expands further on what is presented in chapter 7.2. The following table shows the distribution of TDPs for each of the five largest Nordic countries, according to whether TPD mentions negative consequences from tourism, by typology of sustainability concern treatment. Since Denmark and Sweden do not report negative consequences, the table is not relevant for these countries. For Finland, Iceland and Norway, however, all those regions which have included negative consequences of tourism in their TDP are showed to be either in the light green or the dark green category.

Country	Sustainability concern type	TDP includes negative consequences from tourism		Sum
		Yes	No	
Denmark (N=30)	Dotted	0	11	11
	Grey	0	8	8
	Greyish green	0	3	3
	Light Green	0	2	2
	Dark Green	0	6	6
	Sum, DK	0	30	30
Finland (N=21)	Dotted	0	3	3
	Grey	0	10	10
	Greyish green	0	0	0
	Light Green	0	2	2
	Dark Green	2	4	6
	Sum, F	2	19	21
Iceland (N=7)	Dotted	0	0	0
	Grey	0	1	1
	Greyish green	0	1	1
	Light Green	3	0	3
	Dark Green	2	0	2
	Sum, I	5	2	7
Norway (N=22)	Dotted	0	0	0
	Grey	0	2	2
	Greyish green	0	2	2
	Light Green	1	4	5
	Dark Green	4	9	13
	Sum, N	5	17	22
Sweden (N=26)	Dotted	0	1	1
	Grey	0	1	1
	Greyish green	0	8	8
	Light Green	0	11	11
	Dark Green	0	5	5
	Sum, S	0	26	26

Table 8.1. Distribution of Nordic rural TDPs by sustainability concern type, and whether negative consequences from tourism are mentioned.

Annex 7: Distribution of Nordic rural TDPs according to mentions of negative experiences and TDP process typology by type of sustainability concern

Annex 7 presents a table showing the distribution of rural TDPs for each of the five largest Nordic countries, according to whether the TDP mentions negative experiences from tourism (column 3 and 4), and according to the type of process that led to the TDP (column 5–8), by sustainability concerns (rows).

Country	Sustainability concern type	TDP includes negative consequences from tourism		TDP process type				Sum
		Yes	No	Institutionally led process	Consultancy led process	Inclusive, tourism actors	Inclusive, broad participation	
Denmark (N=30)	Dotted	0	11	7	1	1	2	11
	Grey	0	8	1	0	2	5	8
	Greyish green	0	3	0	0	2	1	3
	Light Green	0	2	0	0	0	2	2
	Dark Green	0	6	2	0	0	4	6
	Sum, DK	0	30	10	1	5	14	30
Finland (N=21)	Dotted	0	3	1	0	2	0	3
	Grey	0	10	1	1	6	2	10
	Greyish green	0	0	0	0	0	0	0
	Light Green	0	2	0	0	1	1	2
	Dark Green	2	4	0	0	1	5	6
	Sum, F	2	19	2	1	10	8	21
Iceland (N=7)	Dotted	0	0	0	0	0	0	0
	Grey	0	1	0	1	0	0	1
	Greyish green	0	1	0	0	1	0	1
	Light Green	3	0	0	0	3	0	3
	Dark Green	2	0	0	0	2	0	2
	Sum, I	5	2	0	1	6	0	7

Norway (N=22)	Dotted	0	0	0	0	0	0	0
	Grey	0	2	1	0	0	1	2
	Greyish green	0	2	2	0	0	0	2
	Light Green	1	4	2	1	2	0	5
	Dark Green	4	9	1	0	8	4	13
	Sum, N	5	17	6	1	10	5	22
Sweden (N=26)	Dotted	0	1	0	1	0	0	1
	Grey	0	1	1	0	0	0	1
	Greyish green	0	8	3	0	4	1	8
	Light Green	0	11	0	0	10	1	11
	Dark Green	0	5	1	1	2	1	5
	Sum, S	0	26	5	2	16	3	26

Table 8.2. Distribution of Nordic rural TDPs according to mentions of negative experiences and TDP process typology by type of sustainability concern.

Annex 8: Introduction to focal chapters presenting examples of how

This annex presents short introductions to focal chapters that provide insight and examples of how certain challenges, many of which are shared in many of the regions, have been addressed by destination management planning. These examples were selected as that they together illustrate some of the most important issues, that have repeatedly presented themselves during the Pan-Nordic analysis of TDPs. At the same time as the examples illustrate commonalities regarding many of the challenges Nordic rural regions are facing in their tourism development, they also present us with some of the diversity. Issues like cruise tourism and 'the right to roam' (also called 'the right of public access') are two subjects that have gotten great attention in academic literature on Nordic tourism while they are not necessarily widely discussed in TDPs across the entire Nordic region. Those two examples are however, where relevant, much debated issues that

Other challenges (like seasonality, carrying capacity, accessibility, environmental concerns, authenticity, coordination, management, infrastructure, investment, profitability etc.) are more commonly shared across the board and could be identified as common challenges in sustainable Nordic rural tourism development. Those examples are provided from each of the five Nordic countries as well as the three autonomous regions.

8.1 Focal case Denmark: Involvement of guests in place development and place branding

The Danish case of Gribskov municipality examines the way the municipality and tourism actors engage with a large and growing group of so-called "leisure-time residents" (in Danish "fritidsborgere"), a voluntary, temporary population. Both residents and "leisure-time residents" are among their target groups of the municipal tourism strategy, together with tourists and

businesses. The “leisure-time residents” is a voluntary temporary population who own or use a summerhouse/cottage and feel a strong place attachment to the area, where they have often visited for generations, despite not living there full-time. For many, this motivates a strong engagement in the development of the municipality as their second home. The “leisure-time residents” are included in a long list of local actors engaged in tourism development, and with whom the municipality commits to a mutually binding collaboration. This focal case thus illustrates a way in which a non-urban municipality can engage and collaborate with resourceful summerhouse owners, typically from the nearby capital area of Copenhagen, as a way to help strengthen the local economic and social benefits from tourism, as well as a way to strengthen its branding.

8.2 Focal case Faroe Islands: Combining branding and sustainability

The Faroe Islands stand out from many of the other regions in their publicly precautions approach to tourism development. While the goal is clearly to increase international tourism on the islands, the Faroese are also determined not to experience overcrowding that may ruin the delegate nature sights and atmosphere that most of their visitors come to experience. They have also introduced the term ‘preservolution’ which they say a new perspective on tourism, an evolution and a solution, with preservation at its core. The tourism campaigns of the Faroe Islands have included prohibiting tourists to visit the islands during a specific weekend under the presumption that the Faroes are ‘closed for maintenance’. By combining branding by promoting sustainability and preservation, the Faroes are trying to utilise the opportunity to shape a prosperous and sustainable tourism industry to the benefits of the local population. Inevitably, the question rises if it is possible to encourage growth and make it go hand in hand with preservation, and how Faroe Islands intends to accomplish this.

8.3 Focal case Finland: Parks and World Heritage—sustainable conservation while securing development outcomes

The Finish case of Kvarken aims to look closer how active destination management is used to try and balance the positive and negative externalities from tourism at a World Heritage Site. It presents the challenge of governing a natural ecosystem, protecting it from risks of over-use and possible environmental degradation while at the same time allowing usage. The Kvarken case introduces the dilemma of balancing the two aspects and how tourism management in a protected area has been used as a tool in trying to achieve sustainable conservation and development outcomes.

8.4. Focal case Greenland: Accessibility, airports and cruise tourism

Greenland is vast, it is the world’s largest non-continental island and large expanses of the island are entirely inaccessible, especially since much of the interior is covered by an ice-sheet. This makes it practically impossible to travel from one destination to another by land due to the lack of an internal road network. International accessibility to Greenland is also limited and expensive. Greenland however, has plans to develop its tourism industry into a major contributor to the country’s economy. Access and transportation to the countries many sites are a however a major challenge for this to be possible. Greenland, being very dependent on cruise liners, view cruise tourism from a different angle than many other regions while they have recently also welcomed foreign capital to development projects that might benefit their tourism growth, e.g. in international airport constructions. The focal chapter on Greenland looks closer into the challenges of accessibility in a country that wants to expand their tourism activities, while the country itself and its different regions are largely inaccessible.

8.5 Focal case Iceland: Addressing seasonality, distribution of tourism across territory and time

In Iceland tourism has had an unprecedented increase in numbers in the past decade while the distribution of tourists is very un-even among the regions of the North Atlantic Island. At the same time seasonal differences are extreme. Before the massive increase of foreign tourists in Iceland from the year 2010, seasonality was high but overall, it has since decreased substantially. This is mainly because change in overnight stays in the capital area in past years. The same has not happened in other regions of the country where seasonality is still high. The Iceland case reflects on how the region of North-East Iceland has addressed the many problems that arise in tourism development that can be related back to the un-even distribution of tourists across territory and time. Distributional and seasonal peaks and lows are addressed as key challenges in the DMPs of both North and East-Iceland as well as by interviewees in the regions, which are commonly connected with insufficient transport infrastructure.

8.6 Focal case Norway: Social tolerance of tourism—challenges in Lofoten regarding to common goods

The Norwegian islands of Lofoten attract staggering numbers of tourists each year from all over the world. The locals living on the island chain have in recent year been faced with the question of how they can strike a balance between encouraging tourism and preserving the natural beauty that draws the tourists in the first place? The Norwegian case therefore looks in more detail into challenges in Lofoten regarding the public access to common goods, how 'the right to roam' affects tourism in the region, and thus the social tolerance of both locals and visitors.

8.7 Focal case Sweden: Public-private partnerships in a border region

In Dalarna I Sweden, right by the Norwegian border, the international airport named 'Scandinavian Mountains Airport' was opened in late 2019. The development of an international airport in the region was solely done to attract skiers to the area and the airport is owned by local companies, such as ski resort owners and municipal tourist promotion companies on both sides of the border. The airport was built with support of the Swedish government along with local counties and municipalities. The case of Sälen therefore takes a look at private-public cooperation on branding to attract more visitors, lengthen a tourism high season by further developing a 'functional tourism region'.

8.8 Focal case Åland:

Åland has unique geographical position between the capitals of Finland and Sweden, making both shipping and tourism important economic activities for the islands. While Åland has a strong and quite diverse local economy relative to its size, their public policy on tourism in recent years has been to expand. The focal chapter about Åland looks into how the islands, which have a rich tradition on innovative solutions, have aimed to use these traditions and existing strengths to reach out to new user groups and extend their traditional summer tourism season. The local food production along with nature and outdoor activities have played a big role in this. Also, the closeness to both Helsinki and Stockholm has been utilised to attract businesses and conventions while focusing on providing a high-quality product and experience. Åland sees the key to success in this matter to gain better knowledge on prioritised markets and target groups—their needs, requirements, and interests. The acquired knowledge and increasing local competence are then to provide a basis for the industry's competence, quality and product development.

8.9 Cruise tourism in the rural Nordic region

Cruise tourism is an area of contention. It gives possibilities and new markets, including bringing tourist to otherwise remote areas. But cruise tourism also creates challenges. There is a growing awareness regarding environmental consequences of the cruise traffic, affecting local water and air quality, climate, nature, and local communities. Some tourism actors place their hopes and strategies on cruise tourism and plan for continued and increased growth; other actors are dissatisfied and plan for regulation and restrictions, as they express that they feel that they bear the costs and inconveniences of a cruise tourism that benefits somebody else. There is a growing appreciation that cruise tourism is "not the most sustainable sector" within tourism (Cruisestrategi for Vestlandet 2016–2020).

Commonly, TDPs frame tourism almost exclusively in a positive way, or, if any contested or critical issues are touched upon, they are usually kept in a diplomatic language. Many conflictive issues, which receive much attention in the academic literature on tourism, are left out of the TDPs. This is the case with one such topic and its local effects, namely cruise tourism. While many frame cruise visit as positive and in other places they are the only realistic entry point, others address the conflicting interests which are especially between land-based and sea-based tourism. Some negative consequences are related to large quantities of cruise tourists and their concentration in time and space, and the related pressure they put on physical infrastructure and social wellbeing; and questioning the distribution of benefits and value created from the cruise tourism.

The focal chapter on cruise tourism takes a closer look at how this is addressed in the relevant TDPs of the Nordic rural regions.

8.10 The right to roam in the rural Nordic region

Steep growth in tourism across many rural areas in the Nordic region from around 2010 until early 2020 has presented different opportunities and challenges. A collective goal of the Nordic countries is to develop its tourism sustainably. Sustainable tourism is seen as a road to place based benefits and as such, that means avoiding social costs, regional economic leakage and environmental degradation. The rural Nordics main attraction is the natural environment which is publicly available and access to it is guaranteed through the 'right to roam', also called 'the public right to access'. At the same time, the increased visitor numbers at rural Nordic destinations often the result of marketing by international or external commercial travel agencies which organise, accommodate and sell tourists these nature experiences. A part of the tourism attraction is the right to roam itself, the access to public areas, and—expectedly—pristine areas. While the experience itself, enjoying nature, is free of charge to the visitors, the cost for the hosting society can be considerable, whether it be social, environmental or economic. This can cause dilemmas and this chapter highlight how these issues are discussed in the Nordic rural tourism development plans.

About this publication

Planning for sustainable tourism in the Nordic region

Pan-Nordic analysis of Regional Tourism Strategies for rural areas

Analyses and text: Ágúst Bogason, Anna Karlsdóttir and Rikke Brandt Broegaard
with contributions from Johanna Jokinen

Maps: Johanna Jokinen

Cover Photo: Ágúst Bogason

Nordregio R2020:12

ISBN 978-91-87295-31-7 (ONLINE)

ISSN: 1403-2503

<http://doi.org/10.6027/R2020:12.1403-2503>

© Nordregio 2020