



A Nordic guidebook for tourism innovation

Tips, trick and learnings from the
X-Nordic Travel Contest programme



ABOUT THE X-NORDIC TRAVEL CONTEST

The X-Nordic Travel Contest (XNTC) is an initiative by Nordic Innovation under the Nordic Council of Ministers, designed to strengthen and enhance the future sustainability and competitiveness of Nordic tourism.

The XNTC project is part of Nordic Innovation's *Tourism in the Nordics* initiative. Launched in 2018, this initiative aligns with Vision 2030 to foster innovation, collaboration, and sustainability across the region.

Following a tender process, the XNTC project has been led by Group NAO in collaboration with Happy42 and Design Nation from Q4 2022 until Q2 2025.

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X Nordic
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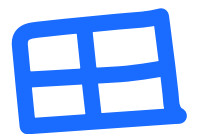
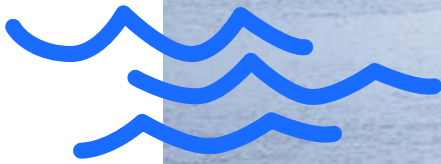
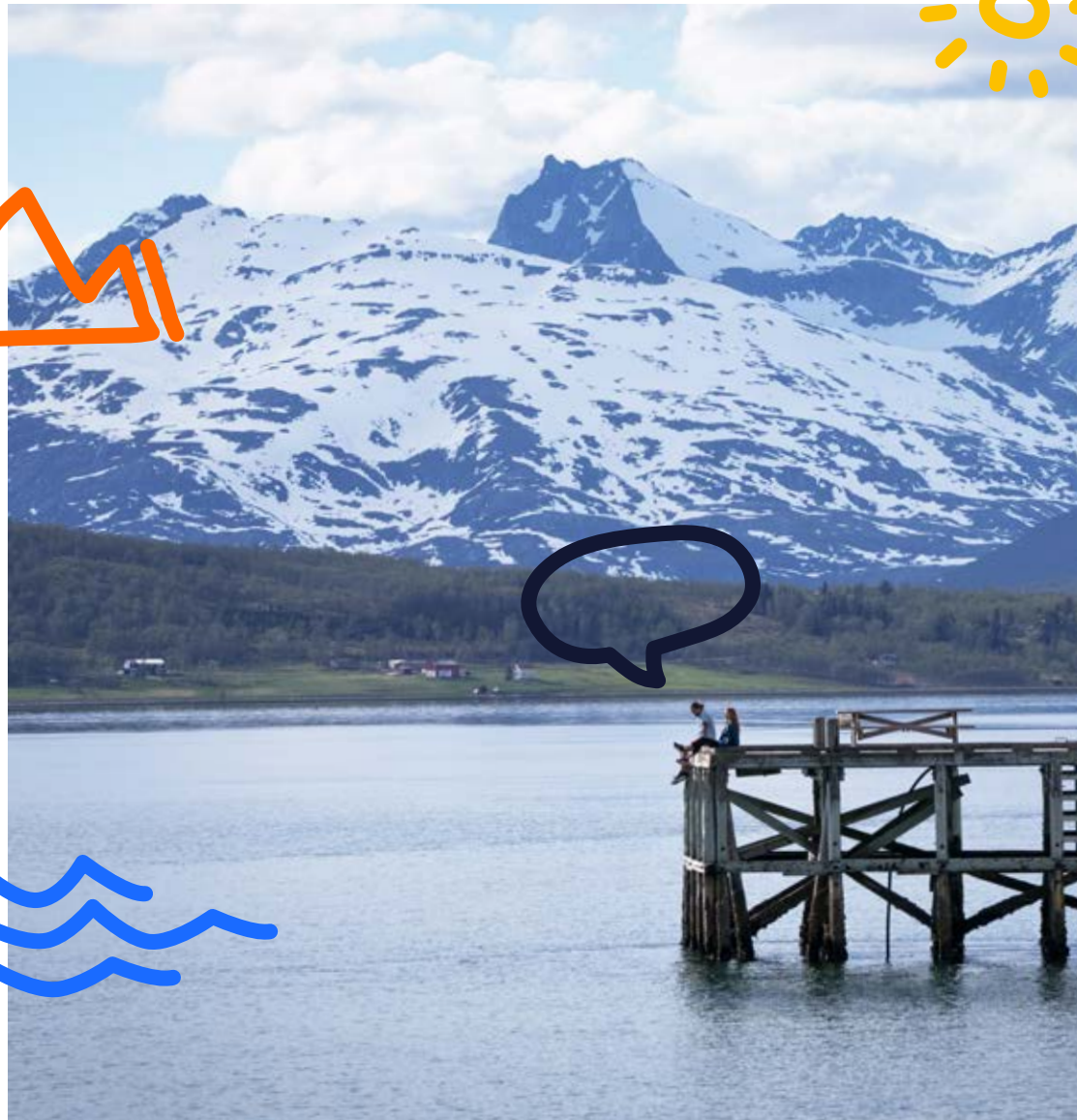


Nordic
Innovation

GROUP
NAO

Happy⁴²

DESIGN
NATION

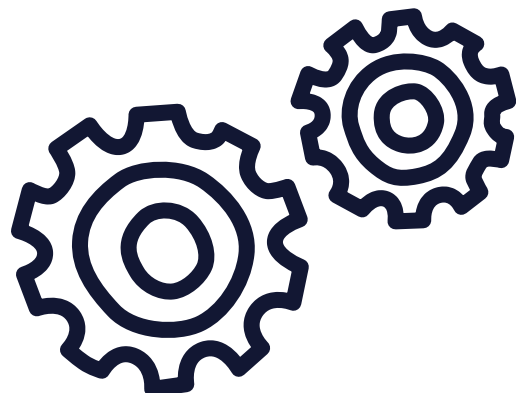


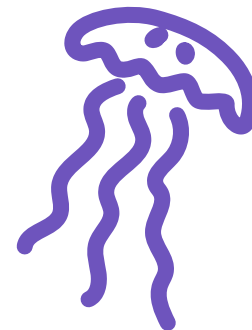
Foreword: Why a cross-Nordic tourism innovation programme?

Following a deep but temporary slump during the pandemic, the tourism sector is once again growing rapidly in all the Nordic countries, creating value across the region. Nonetheless, the years of lockdowns and travel restrictions have also called renewed attention to the sector's challenges. From its carbon footprint to the growing pains felt by local communities, the effects of tourism are once again plain to see. This is the context behind the X-Nordic Travel Contest.

The X-Nordic Travel Contest project follows from the tourism strategy agreed by the Nordic ministers of trade and business in 2019, and it aligns with the Nordic vision for 2030, which states that the Nordic region should be the most sustainable and integrated in the world by that year. It also fits well with Nordic Innovation's mission to support businesses. After all, businesses – along with other tourism professionals – drive the tourism sector across the region. The lasting changes we wish to see in the sector, then, depend on these actors.

I have been delighted to see more than 300 tourism businesses and organizations of all sizes, from all parts of the Nordic region, take part in the X-Nordic Travel Contest. Over the past two years – in workshops, hackathons, testing tracks, and beyond – they have described the challenges they face, pinpointed the solutions they would like to see, and helped to develop and test new travel tech innovations and business models.





All these industry actors have given generously of their time, and we are deeply grateful for that. I want to thank them for sharing their experiences, feedback, and recommendations. I would also like to thank Group NAO, Design Nation, and Happy42 for their project management and the reference group for all their input. Finally, I am grateful to the Nordic Tourism Working Group and the Nordic Council of Ministers' secretariat for their support.

The methods and findings from the X-Nordic Travel Contest have been gathered in this guidebook. I hope that it will serve as source of inspiration for tourism professionals and startups within the sector, and that they will use the practical tools offered here as innovation methods that strengthen the sustainability and competitiveness of the Nordic tourism industry.

Oslo, March 2025

Svein Berg, Managing Director
Nordic Innovation





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Reading instruction: Is this a guidebook for you?

You are reading the XNTC Guidebook. What is this Guidebook about? And why should you continue reading it?

Tourism in the Nordics, like much of the global tourism industry, operates on thin margins. This fragility often discourages risk-taking, leading to cautious decision-making and slow, incremental improvements. But survival-mode thinking and hesitation are not going to cut it. If Nordic tourism wants to stay relevant, sustainable and competitive, we need to rethink not just *how* the industry operates, but *why* it operates that way in the first place.

“The tourism industry is quite old-school. Many organisations barely use AI, even though there’s so much potential to optimise their operations. There’s resistance to change, partly because the average age in these organisations is high, and change management can be challenging.”

... in conversation with Mathias Mølgaard, CEO & Co-founder, Storyhunt, read more on Page 38

The Nordic region is known for sustainability and collaboration — it’s part of our identity. But these values are at risk of becoming empty buzzwords if not backed by new thinking and new collaborative ways of doing. The sustainable and competitive future of Nordic tourism depends on pushing beyond the familiar and testing new ideas — even when the road gets bumpy.

HOW TO INNOVATE IN TRAVEL AND TOURISM

This is where this Guidebook comes in. It captures the tips, tricks, and real lessons of the X-Nordic Travel Contest (XNTC), a two-year cross-Nordic tourism innovation journey. This isn't a play-by-play manual or a promise of quick fixes. Instead, it's a practical, honest look at how innovation happens: messy, exciting, and sometimes surprising.

Curious about the honest ups and downs of making meaningful change and collaboration? Then you're in the right place.

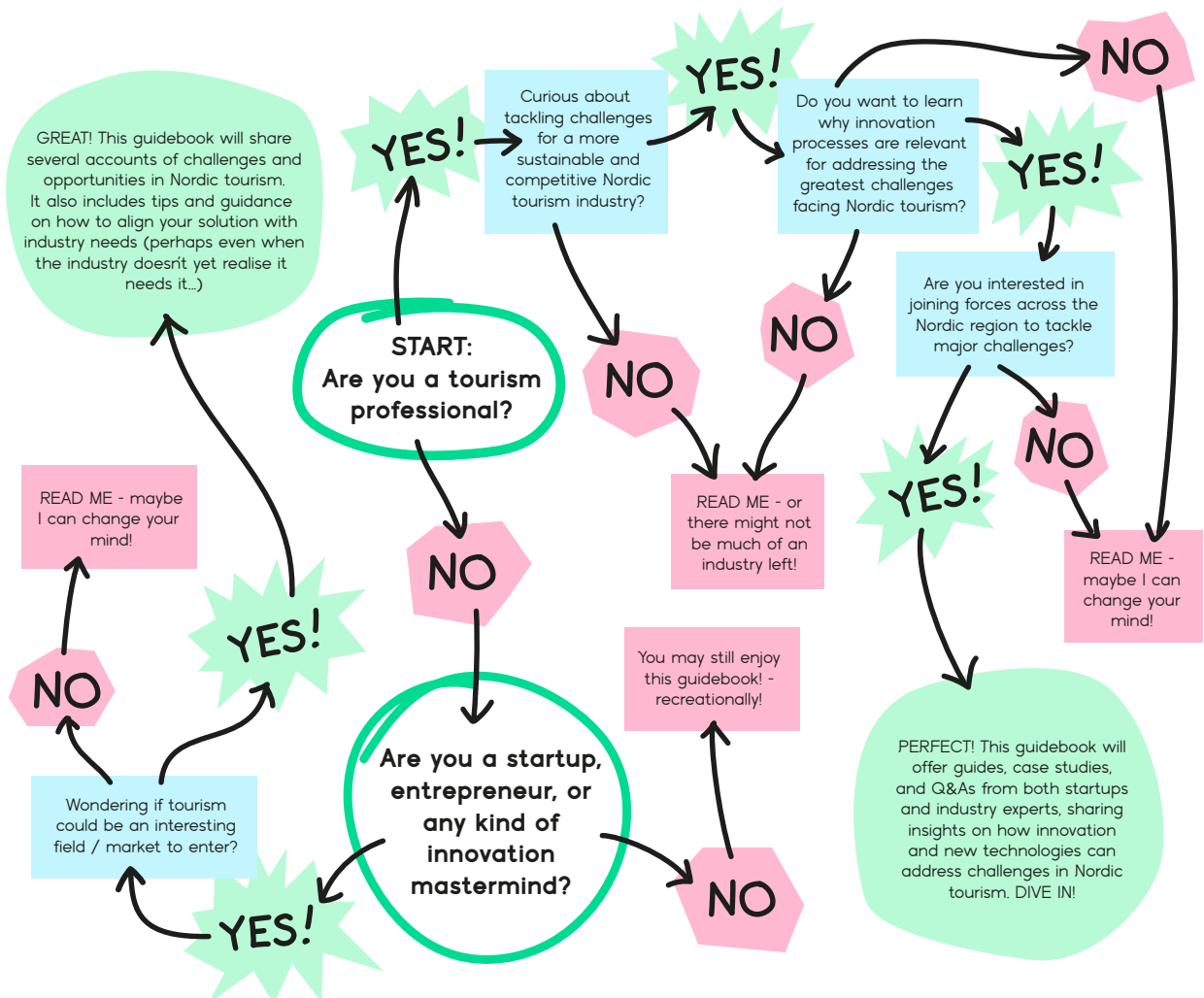


This Guidebook dives into:

- The challenge of identifying problems that really matter, also in 5 years.
- Bridging the gap from headline problems to big ideas to real-world solutions.
- Navigating the Nordic travel startup landscape.
- Connecting forward-thinking startups with an industry that... let's face it... is not exactly famous for embracing change.

This Guidebook is also about leaving a legacy of the X-Nordic Travel Contest. With this Guidebook, we hope that these learnings don't just sit in a drawer, but can be part of fueling future efforts to make Nordic tourism futures better.

ARE YOU IN THE RIGHT PLACE?



CHAPTER 1: WHAT IS THE XNTC PROGRAMME?



Full circle innovation in four phases

Initiated by Nordic Innovation, the X-Nordic Travel Contest (XNTC) programme has centred on the guiding purpose of strengthening the sustainable and competitive future of the Nordic tourism industry.

To achieve this, the XNTC programme was designed for full circle innovation through four distinct phases, each with distinct target groups for involvement:

Firstly, mapping and identifying the main challenges of Nordic tourism together with the Nordic tourism sector and industry.

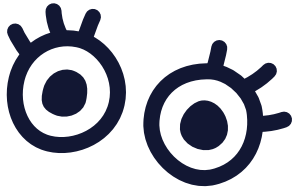
Secondly, inviting solutions and new thinking to address these challenges together with universities and Nordic startup ecosystems.

Thirdly, matching solutions with industry and challenge owners to test in collaboration with a view to solution viability, accessibility and scalability in real-world and cross-Nordic contexts.

Fourthly, unfolding new solutions in a cross-Nordic context, and promoting tested solutions for further Nordic adoption and innovation.

In practice, the XNTC programme has applied many different methodologies and approaches throughout all four phases: From hackathons to design sprints, playful mapping tools, surveys, discovery and explorative interviews, prototyping, data analysis, awareness raising, and more. All to stimulate new thinking and new collaboration between Nordic startups and Nordic tourism industry.





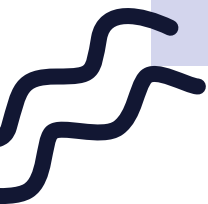
PHASE 1: LOOKING FOR TROUBLE

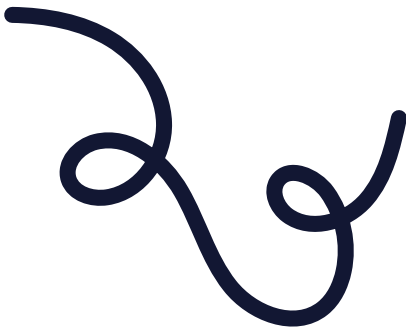
(SPRING–SUMMER 2023)

XNTC started by inviting the industry to share their problems: What are the real and solvable problems that the Nordic tourism industry needs to address for a more sustainable and competitive future of the sector. This phase involved:

- 6 workshops across Denmark, Norway, Finland, Faroe Islands, Iceland and Sweden with more than 150 tourism stakeholders involved.
- A Nordic survey of 140 tourism businesses and industry representatives.
- 18 in-depth qualitative interviews
- One Academic Panel of 6 members to contextualise, challenge and qualify insights and findings of workshops and interviews.:

Scan QR to access summary of phase 1 with a catalogue of challenges identified across the Nordics.





PHASE 2: SEARCH FOR SOLUTIONS

(FALL–WINTER 2023)

Loaded with challenges from the Nordic tourism & hospitality industry, the XNTC programme shifted focus to sourcing solutions through open innovation activities, including:

- Hackathons and design sprints, carried out in collaboration with universities and startup ecosystems, each focused on different challenges.
- Mapping of 400+ Nordic tourism, travel & hospitality startups to gain overview of the status of innovative solution already available in the tourism landscape and using this to identify key trends and opportunities for further matchmaking.



PHASE 3: PROBLEM ACCELERATORS

(SPRING–FALL 2024)

With new solutions identified, XNTC now entered a phase of unfolding solutions in customised development and test tracks. Methods applied in this phase included anything and everything from sprints to matchmaking, different kinds of product, market and partnership tests, ongoing mentoring, industry awareness activities, and new market introductions.

Solutions tested could generally be put into three different categories:

- **New ideas:** Completely new ideas, and ideas out of a hackathon or sprint.
- **Step-Ups:** Early-stage solutions needing mentorship and introductions to develop it further.
- **Ventures:** Solutions already established, but within a different marketplace – and with potential to be introduced / adapted to the tourism market via matchmaking, testing and mentoring.

Ultimately, most of the successful development and test tracks fell within the categories of New Ideas and Ventures.



PHASE 4: MARKET-READY

(FALL 2024–SPRING 2025)

It became clear throughout that process that building awareness and openness 1) towards new solutions, and 2) towards tourism as a possible market, and 3) of the potential and benefits of cross-Nordic collaboration for innovation and market access, was much more important than initially expected.

The final phase of XNTC stretched into early spring of 2025 with three key focus areas:

- Supporting startups and solution owners in promoting their innovations across the Nordics for further scale and distribution.
- Increasing awareness of available solutions, of tourism as a potential market, and of the cross-Nordic innovation and tourism market potential.
- Ensuring the legacy of XNTC lessons learned – hence this Guidebook that you are currently reading.

OVERVIEW OF XNTC PHASES & TIMELINE

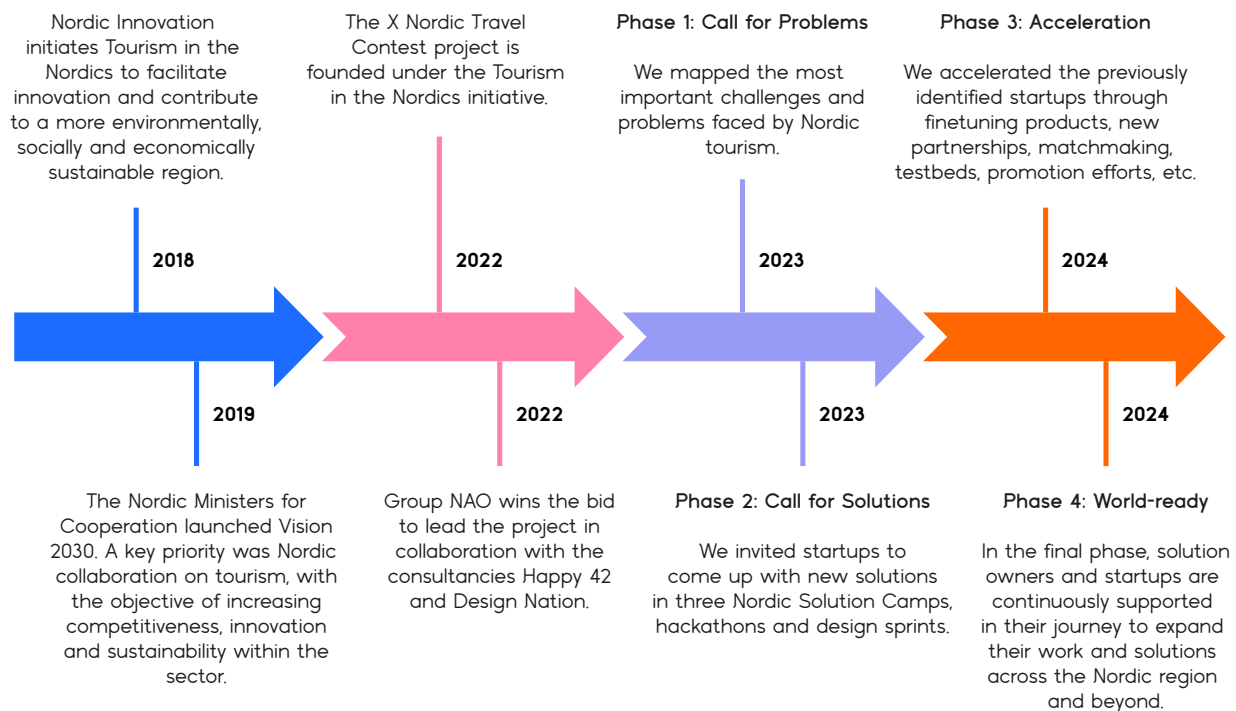
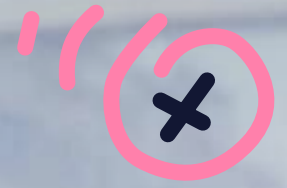




Photo: from top Mads Schmidt-Rasmussen, Nikolaj Beck, Yaidi Levy / norden.org

CHAPTER 2: THE PROBLEM WITH PROBLEMS



Why problems matter more than solutions

The true challenge of any innovation process isn't about jumping to ideas – it's about finding the *right* or the *better* problem to solve. When we rush into solution mode, we risk developing ideas, designing products or services based on assumptions rather than actual needs.

This chapter explores the Problem Mapping phase of XNTC, addressing the problem of finding the right problems, checking your own assumptions, and the very human reluctance to stay with the problem and instead jump to ideas and solutions.

As you read this chapter, are you also looking to understand the real problems to solve?

If so, this chapter will guide you in how to 1) reframe and rephrase your problem multiple times, 2) question your assumptions that go into phrasing the problem, and 3) stay with the problem just a little longer...

This chapter is all about slowing down in order to dig deeper into the problem. The key takeaway is this: Staying with the problem, even to the point of discomfort and impatience, is well worth it.

"If I had an hour to solve a problem, I'd spend 55 minutes thinking about the problem and five minutes thinking about solutions"

as Albert Einstein supposedly said



QUICK OVERVIEW: XNTC Problem Mapping & Looking for Trouble

A quick overview of the XNTC activities as part of the problem mapping within four key categories of activity to ensure different perspective across the Nordic tourism landscape:

- **6 Problem Mapping Workshops** across Denmark, Norway, Sweden, the Faroe Islands, Iceland, and Finland, with 152 stakeholders from various parts of the tourism industry and sector. The workshops centered around collaboratively identifying key issues and problems – with a new, gamified and engaging mapping tool.
- **18 Qualitative Interviews:** In-depth interviews to gain understanding of tourism industry representatives' views on core challenges facing Nordic tourism in the coming 5-10 years. Insights from interviews further qualified problems identified in workshops.
- **Cross-Nordic Survey of Tourism Businesses:** 140 responses from across the Nordic region, diving into top industry challenges. The survey was distributed in partnerships with destination organisations and industry associations.
- **Academic Panel:** 6 Nordic experts from diverse fields of academia discussed findings and added further depth and context to findings from workshops, interviews and survey in two online meetings.





REFRAMING & REPHRASING THE PROBLEM

Problems are everywhere: from media headlines of climate change to everyday complaints and inefficiencies. So, why is it so difficult to find the *right* or the *better* problem to solve?

This is a challenge not only recognised by genius thinkers like Albert Einstein, but also by business leaders around the world.

In an article by Thomas Wedell-Wedellsborg in Harvard Business Review (January – February 2017), titled “*Are You Solving the Right Problems?*”, the author references his research of 106 C-suit executives, representing companies from 17 countries. Thomas Wedell-Wedellsborg finds that 85% of these business leaders agree that their organisations were bad at diagnosing problems, and 87% agree that this organisational weakness came with serious costs.¹

“85% of business leaders across 17 countries agree that their organisations were bad at diagnosing problems”

T. Wedell-Wedellsborg. “Are You Solving the Right Problems?”. (Harvard Business Review 2017)

Now, Thomas Wedell-Wedellsborg also makes the point that reframing your problem is not so much about finding the ‘real problem’, but rather to find out if there is a better problem to solve. In most cases, there isn’t just one single root problem. Many problems are multicausal and can be addressed in many ways.

The Example of The Slow Elevator

He uses the example of the slow elevator. People living in a building complain about the elevator – that *it’s old and slow, and they all spend a lot of time waiting*.

Now, people then quickly jump to solutions based on the framing of the problem: *the elevator is too slow and it’s bothering people*. So, the solution becomes: *Make the elevator faster*.

However, if the problem is instead rephrased to shift focus slightly, the problem becomes more related to the fact that people are annoyed or get bored while waiting for the elevator. And this reframing opens to a myriad of new solutions: Adding mirrors, music or even a screen with media display, posters with events in the neighborhood – all of which can make the waiting time more enjoyable and less frustrating.

¹ Wedell-Wedellsborg, Thomas (2017). “Are You Solving the Right Problems?”. Harvard Business Review (Magazine January – February 2017): <https://hbr.org/2017/01/are-you-solving-the-right-problems>





CHALLENGE YOUR ASSUMPTIONS

In framing your problems, the initial problem statement and approach will often reflect your assumptions about what is wrong. And, like most industries, the Nordic tourism industry also holds a lot of assumptions about what's wrong with tourism today.

Assumptions are like shortcuts our minds take to simplify complexity – but they can lead us astray at a potentially high cost, especially when trying to understand problems of today and tomorrow. For example, a tour operator might assume a lack of customer interest in eco-tours means people don't care about sustainability, when the issue could simply be poor communication of the benefits and experiences involved.

Focus on Your Critical Assumptions

Not all assumptions need to be tested equally, it often suffices to focus on your critical assumptions only.

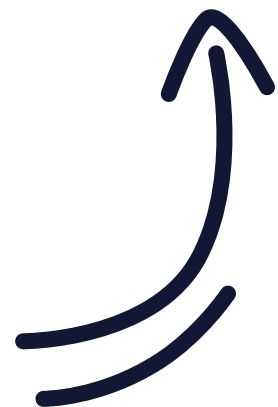
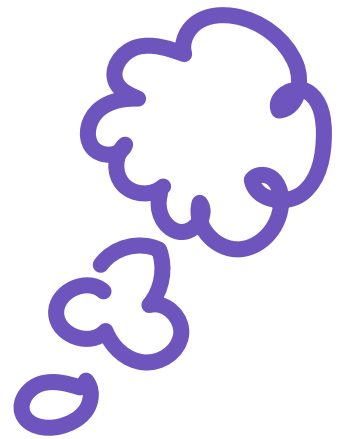
What makes a critical assumption about your problems? A **critical assumption about a problem** is an assumption that fundamentally shapes your understanding of the problem at hand. If this assumption later turns out to be false, you may be solving the wrong problem – in the wrong way.

Consider the following when checking your assumptions about the problem:

- Is this assumption shaping how you see or understand the problem?
- How big is the risk? If this assumption is wrong, how much impact could it have?
- Does it shape your approach and solutions?
- Is it based on evidence?
- Are you making assumptions about urgency?

Critical Assumptions About Urgency

The last item on the checklist has become more important to XNTC than expected: It is crucial to check the assumptions about the urgency of a problem: for example, a manager might assume the problem can wait, but it might be necessary to address it before it escalates. Similarly, a manager might assume it's more urgent than it actually is, thereby potentially distracting from more immediate priorities.



“Initially, it was tough. Many tourism SMEs view cybersecurity as something for larger companies or high-risk industries. A common mindset was: “Why would anyone target us? We’re just a small hotel or tour operator.”

... in conversation with Eskil Sørensen, CEO & Founder, Cybercue see more on Page 84

XNTC lesson: Assumptions about the urgency of problems can lead to ignoring risks that need proactive attention before they escalate. Cybersecurity has been a clear example: While workshops highlighted it as a problem, some Nordic tourism businesses dismissed it in practice, assuming it was a concern only for larger companies or high-risk industries. However, as the digital landscape evolves, even small tourism businesses are becoming increasingly vulnerable to data breaches and fraud. Failing to address these risks now could result in significant losses in the future.



STAYING IN THE PROBLEM (WITHOUT LOSING ENERGY)

It is not easy to stay with the problem, spending time trying to rephrase, reframe and checking your assumptions. It is only human to want to jump to the much nicer and more comfortable space of fixing stuff: Coming up with ideas and solutions to address the problems. It can frankly be draining to focus for so long on what is wrong without any forward momentum.

And if you need to identify problems as a collective, in an engaging way with multiple stakeholders, there is a real concern that your workshop or mapping exercise risks losing energy and direction, getting lost and stuck in problems and the negativity of the seemingly insolvable.

In the XNTC Problem Workshops, the energy was kept high by three simple techniques:

- 1. Establish momentum:** Demonstrate to participants how their input is valuable and will be used to inform future solutions.
- 2. Inspire thinking:** Use the moment to give participants inspiration for new thinking – introducing them to examples from other destinations and introducing them to new methodologies.
- 3. Turning problem mapping into play:** Using interactive tools to make problem mapping both collaborative and engaging; with multiple steps that keep the process fresh and motivate people to move forward towards the next step.

To turn problem mapping into play, XNTC and Group NAO joined forces with change agency Workz to develop a gamified workshop tool to engage participants in collaboratively mapping problems, reframing and questioning the causes, effects and whether they were diving into the better problem.

The Power of Playful Formats & Serious Games – According to Workz

Games aren't just for fun – they're for figuring stuff out

Serious games take tricky ideas and make them easier to get. They turn big challenges – or finding problems – into something you can actually play with and maybe even enjoy.

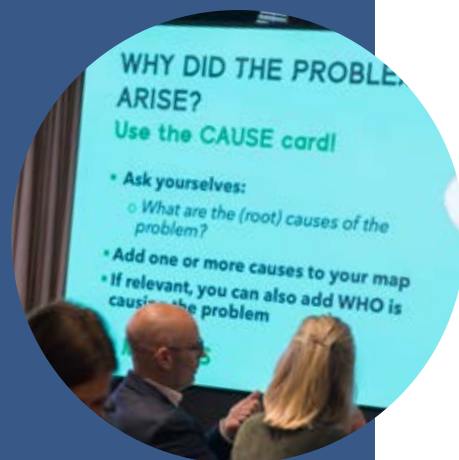
Games are Safe Places to Test Your Ideas

Games are like a test run for your ideas. You can try, fail, and tweak your approach – all without breaking anything real.

New Angles, Fresh Ideas

Sometimes it's hard to see the bigger picture. Games let you switch roles – maybe you're the visitor, the hotel, or the local resident. It's a quick way to see things differently.

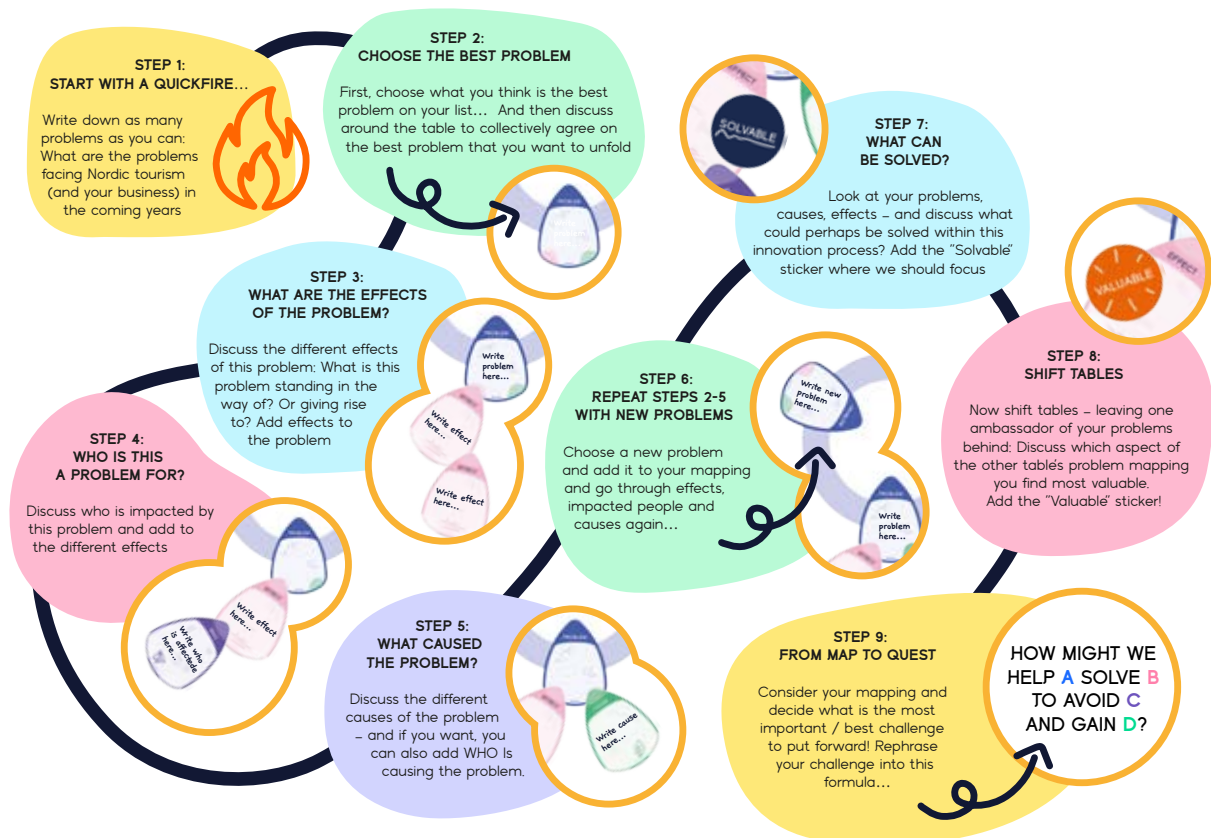
Bottom line: *Serious games make hard stuff less hard. They get people talking, thinking, and collaborating – all while keeping it fun. In the XNTC workshop, it was all about testing the multiple different aspects of the big tourism problems of the Nordics – and sorting symptoms from effects and root causes.*





TURNING PROBLEM INTO PLAY

In the following, we have unfolded the gamified workshop tool that turned problem mapping rather fun – and highly collaborative. Each step was revealed to participants along the way with strict time frames for each step, which let participants experience a continuous sense of progress, as well as a certain time pressure which can help drive discussions and collaboration forward and avoid getting stuck in the problems.



The XNTC Problem Mapping tool was developed in collaboration with Workz (<https://workzchange.com/>)

SUMMARISING THE PROBLEMS

Across all workshops, interviews, the survey and expert panel, XNTC summarised all findings in the XNTC Opportunity Catalogue – with country-by-country findings and the top 10 list of core problems and challenges that stand in the way of a long-term sustainable and competitive Nordic tourism industry.

SO, WHAT WAS THE PROBLEM WITH THE PROBLEMS?

A good problem is both **specific** and **relevant** over time. And while the Opportunity Catalogue gave great insights into the key issues and problems both experienced and anticipated among Nordic tourism industry representatives, we still had a few problems with the problems...

☑ **Missing specificity:**

To bridge the problems into concrete searches for solutions, the problems needed to be defined in more specificity.

☑ **Lacking future perspective:**

To make sure that it would be worthwhile for startups or entrepreneurs to develop solutions to these problems, the problems had to have a future perspective. If this will be solved by itself within 1-2 years, then it doesn't make sense for a start-up to invest time and resources into it.

☑ **No business case:**

To make sure that the problem has a viable market recipient and doesn't create solutions that will depend on public funding in the long run to survive.

Before starting to look for solutions and later match solutions with industry, the problems were firstly prioritised according to cross-Nordic potential and priority, and then further specified and future-proofed with three concrete questions:

- Will this also be a problem in 5-10 years from now, unless we come up with new solutions?
- Is this a generic headline, or does it represent an actual specified problem and challenge of the industry?
- Is this already a crowded space of tourism solutions – or are we diving into problems where XNTC can add value in creating space and focus for new solutions to existing and future problems that will impact the sustainability and competitiveness of the Nordic tourism industry?

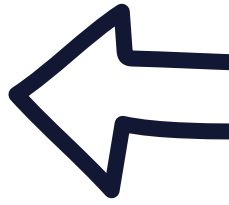




CHAPTER 3: HACKING SOLUTIONS



Why hackatons are always great – and sometimes right!



Hackathons are bursts of energy. Intensive, time-limited events where people come together to brainstorm, collaborate, and engage in rapid prototyping to build solutions to specific challenges. It's a space for creativity and problem-solving, often producing early-stage ideas or solutions in just a few days.

“Hackathons are a great way to test ideas, meet people, and gain exposure to an industry. Even if you don't win, the connections and learnings can be invaluable. That's what happened to us – you never know who you'll meet or what opportunities will come out of it”

... in conversation with Mathias Mølgaard, CEO & Co-founder Storyhunt, see more on page 38

An often-overlooked strength of hackathons is how they break away from typical project structures. In a regular office, projects often get bogged down by hierarchies, approval processes, strategy meetings, and budget checks. But there's no room for bureaucracy in a hackathon! You don't have to be a senior executive to propose or push an idea forward. In a hackathon, every idea has a chance — if it makes sense to the rest of the team.

Another superpower of hackathons is their adaptability, fitting seamlessly into diverse settings from universities to more corporate spaces. The key is aligning the format with your goals and the participants you want to engage.

The starting point of this chapter is the Solution Searching phase of XNTC – a phase primarily centered around hackathons and the hope that out of these hackathons would come solutions to the cross-Nordic problems already identified by the tourism industry.

In this chapter, we'll look at why hackathons can be great—and why they're not always the right fit. You'll find practical tips on when to use hackathons, how to run one, and why the work shouldn't stop after the final pitch. Through three very different examples, we'll explore how hackathons can produce golden ideas, promising concepts waiting to hatch, or bursts of energy that spark excitement but don't always lead to a big solution.

QUICK OVERVIEW: XNTC Search for Solutions & Hackathons

A quick overview of the XNTC activities as part of the solution search, based on the challenges identified in the problem mapping:

- **2 Hackathons** in Denmark and Iceland, branded as "Solution Camps" and carried out in partnership with a Danish University and the Iceland tourism and startup ecosystems respectively.
- **Through a Cross-Nordic Mapping of Tourism Startups**, XNTC uncovered approximately 400 tourism and tourism-related startups across the region, categorising them to highlight emerging trends and opportunities (See Chapter 4).
- **Open Calls for Solutions:** Based on the challenges identified, XNTC launched open calls for solutions within three overall themes: 1) Planet preservation, 2) Co-creating a year-round industry, and 3) sustainable business models for tourism SMEs.
- **XNTC conducted 3 Intensive Design Sprints** to dive deeper into the outcomes of the two hackathons, and a stronger focus on the problem area of digitalisation.

WHEN, AND WHEN NOT, TO DO A HACKATHON

Hackathons are an incredible tool when used intentionally. Done right, they can spark fresh ideas, solve real problems, and energise participants. But their chaotic energy and time-limited nature mean they're not right for every situation. For example, without clear goals and a plan for what comes next, the impact of a hackathon can fade as quickly as it started – leaving little behind but a LinkedIn post to mark the occasion.

**Hack or Hype?
Are you doing
a hackathon to
solve problems
– or are you doing
it to make cool
LinkedIn posts?**





So, when should you go all-in on a hackathon? And when is it better to hold off?

Here's a guide to help you decide:

When to Do a Hackathon...

✔ **When you have a well-defined challenge that can be accessed quickly:**

Hackathons are great for solving problems that can quickly be accessed and lend themselves to quick brainstorming, prototyping, and rough drafts, like building Minimum Viable Products (MVPs) or testing concepts.

✔ **When it's time to pressure-test emerging technologies:**

Hackathons provide a fast-paced environment for experimenting with cutting-edge tools or technologies (like AI, blockchain, or IoT). Participants can uncover practical use cases or unexpected limitations that wouldn't surface in controlled settings.

✔ **When you want to introduce new tools or platforms:**

Hackathons are a great way to showcase APIs, technologies, or frameworks, helping participants learn through hands-on experimentation.

✔ **When you want to safely explore "What If?" scenarios:**

Hackathons provide a safe space to test wild ideas or tackle "what if" scenarios without the risk or commitment of full-scale development.

✔ **When employees or teams need an energy boost:**

A hackathon can re-energise teams stuck in a slump and ignite enthusiasm to tackle wicked challenges.

✔ **When you need to shift organisational mindsets:**

Hackathons can challenge traditional ways of working, encourage teams to think outside of rigid structures, embrace experimentation, and become more comfortable with ambiguity.

✔ **When you want to build a sense of community and collaboration:**

Hackathons are excellent for fostering connections across teams, departments, or industries. And across diverse skillsets.

✔ **When you want to attract unconventional participants:**

Bring fresh perspectives into your industry by inviting participants with varied skill sets and backgrounds perhaps not otherwise exposed or attracted to your industry.

✔ **When you want to attract new talent:**

Use hackathons to spot emerging talent and creative thinkers who can bring new ideas to your organisation or industry.

✔ **When you're looking to pilot new ways of working:**

Use a hackathon to introduce your organisation to fast-paced, agile approaches that may not be part of its usual workflow.

✔ **When you want to highlight a specific problem:**

Hackathons can draw attention to underexplored challenges and inspire innovative approaches to tackle them, or simply inspire more people to care.

✔ **When kickstarting a long-term project:**

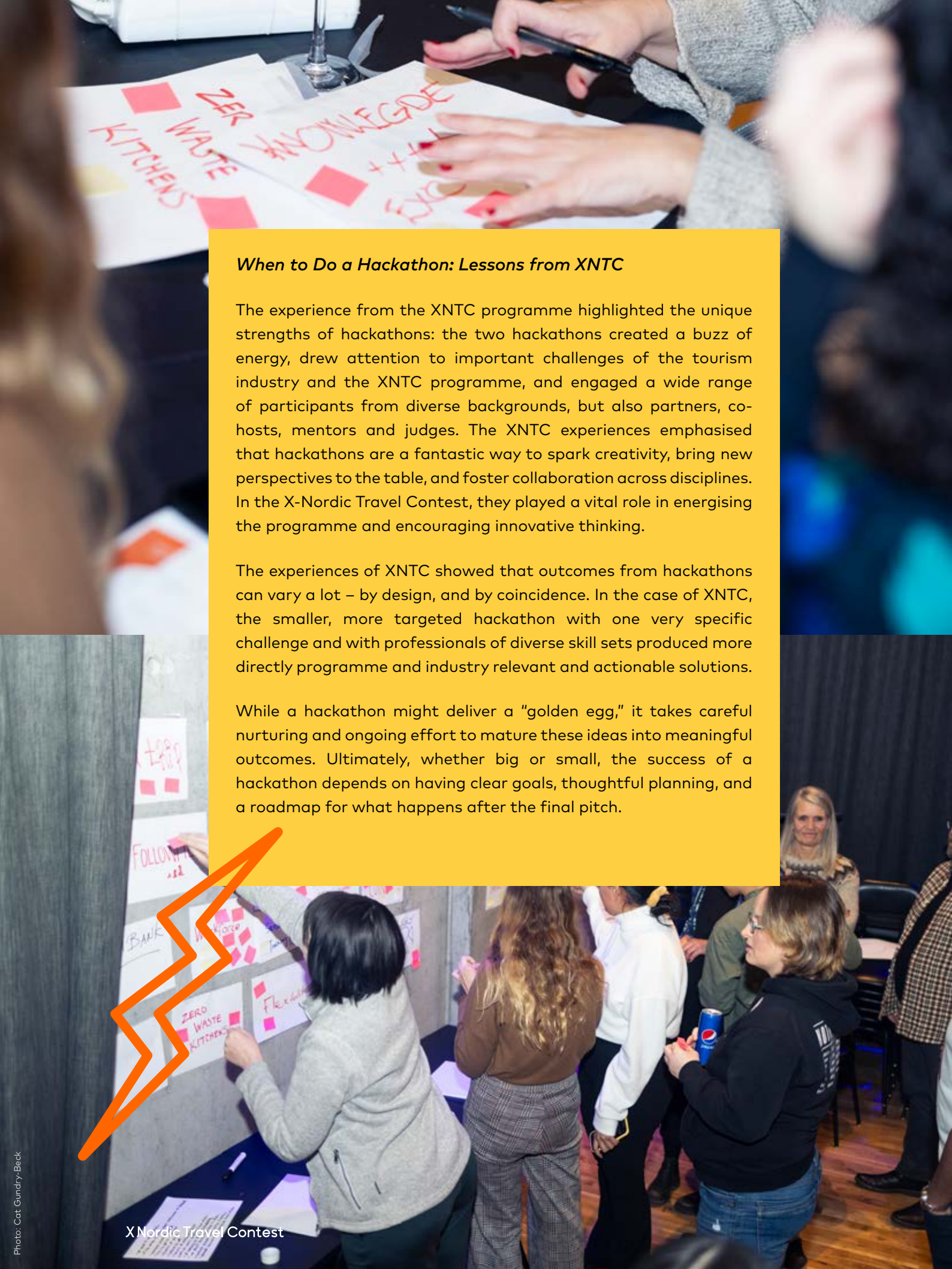
Hackathons can lay the groundwork for larger initiatives, providing an initial framework or set of ideas to build on later.



When Not to Do a Hackathon...

- ☒ **When the problem requires deep research or expertise:**
Hackathons aren't ideal for tackling highly technical or research-heavy challenges that need extended timelines and specialized resources.
- ☒ **When the challenge doesn't inspire creativity:**
Hackathons thrive on excitement and creative energy. If the challenge is overly technical, mundane, or procedural, it may fail to engage participants, resulting in low-quality outputs.
- ☒ **When there's no plan / no appetite for post-hackathon follow-up:**
If you don't have a plan, appetite, bandwidth, buy-in or resources to follow-up on the ideas generated, running a hackathon risks wasting both time and goodwill.
- ☒ **When you can't engage the right participants:**
A hackathon needs diversity in skills, perspectives, and expertise. Without this mix, teams may struggle to generate new thinking and innovative solutions.
- ☒ **When resources or time are stretched thin:**
Hosting a hackathon during high-stress periods (e.g., end-of-quarter deadlines or student exam periods) can hurt participation and engagement.
- ☒ **When mentors aren't well-prepared or lack relevant expertise:**
Uninformed or uninterested hackathon mentors can frustrate participants, derail discussions, or provide unhelpful advice, reducing the overall quality of the event and ideas.
- ☒ **When there's no clear incentive to participate:**
If participants don't see personal or professional value in taking part—whether through prizes, networking, or learning opportunities—they might not engage fully or even show up.
- ☒ **When your problem is too vague or broad:**
Ambiguity can kill a hackathon. Challenges like "fix sustainability" or "digitise tourism" are too broad and lead to scattered ideas that are hard to execute, and likely not very relevant.
- ☒ **When your problem requires immediate solutions:**
Hackathons are great for sparking ideas, but not for emergencies. If you need a solution that can be implemented right away, the iterative and experimental nature of hackathons might not be the right fit.
- ☒ **When it's just for fun:**
While hackathons can be fun, hosting one without a meaningful objective risks being seen as a gimmick and people involved may leave feeling their time was wasted.





When to Do a Hackathon: Lessons from XNTC

The experience from the XNTC programme highlighted the unique strengths of hackathons: the two hackathons created a buzz of energy, drew attention to important challenges of the tourism industry and the XNTC programme, and engaged a wide range of participants from diverse backgrounds, but also partners, co-hosts, mentors and judges. The XNTC experiences emphasised that hackathons are a fantastic way to spark creativity, bring new perspectives to the table, and foster collaboration across disciplines. In the X-Nordic Travel Contest, they played a vital role in energising the programme and encouraging innovative thinking.

The experiences of XNTC showed that outcomes from hackathons can vary a lot – by design, and by coincidence. In the case of XNTC, the smaller, more targeted hackathon with one very specific challenge and with professionals of diverse skill sets produced more directly programme and industry relevant and actionable solutions.

While a hackathon might deliver a “golden egg,” it takes careful nurturing and ongoing effort to mature these ideas into meaningful outcomes. Ultimately, whether big or small, the success of a hackathon depends on having clear goals, thoughtful planning, and a roadmap for what happens after the final pitch.



YOUR 9 STEP GUIDE TO DESIGN A HACKATHON

As someone who has done more than 200 hackathons around the world, as organiser, mentor, facilitator, Lasse Chor of Happy 42, and part of the XNTC consortia, shares his steps to design a great hackathon:

1. *Prep and Plan*

- **Define your purpose:** Are you designing a hackathon for innovation, problem solving, piloting new tech, community building ...? Choose a clear, focused theme and avoid overly broad ones like "sustainability".
- **Set the duration:** Will your hackathon be 24 hours, 48 hours, or longer? Don't forget to plan appealing perks like prizes, interesting mentors, cool data sources to keep participants motivated.

2. *Know Your Hackers*

- **Decide who you're targeting:** Students – perhaps of specific specialties? Developers? Designers? Entrepreneurs? Or a mix? Make sure your theme is relevant and appealing to them.
- **Set clear eligibility criteria:** Outline any required skills (e.g., programming knowledge) to manage expectations.
- **Consider asking for short bios:** Ask participants to share their skill sets, backgrounds and interests to help with team formation and mentor pairing.

3. *Engage Mentors and Stakeholders*

- **Recruit experienced mentors:** They bring valuable expertise to guide teams, keep them on track, and refine ideas. They may also represent industry stakeholders to bridge from hackathon to the real-world application.
- **Partner with industry stakeholders:** They ensure the challenges are relevant and can help build connections post-hackathon.

4. *Nail the Logistics*

- **Book a suitable venue:** Ensure power, Wi-Fi, seating, and rest areas are ready.
- **Get the tech setup right:** Charging stations, projectors, and reliable internet are a must.
- **Detail the schedule:** Ahead of the hackathon, make sure participants, speakers, experts, judges, mentors all have a detailed schedule with check-ins, work time, pitch times, and judging. Ensure all team members know their roles.

5. *Spread the Word*

- **Create branding that stands out:** Consider creating a logo, or a noticeable color scheme, or theme that makes your hackathon stand out.
- **Promote widely:** Use social media, emails, and partnerships to attract participants. Build a smooth and simple registration portal to make sign-ups easy.

6. *Find a Great Facilitator*

- **Choose an experienced hackathon organiser:** They will manage the schedule, and when the schedule changes, they will be able to adapt and make sure participants don't experience any disruptions of change.
- **High energy is key:** The facilitator should keep the crowd engaged and maintain momentum.
- **Communication is critical:** The facilitator will ensure participants know what's happening at all times - without adding to the natural (and fun) chaos of a hackathon.

7. *Hackathon Day(s)*

- **Stick to your schedule:** Make check-ins, workshops, and pitch times clear.
- **Keep the energy up:** Announce progress updates and circulate mentors for support and guidance.
- **Less talk, more action:** Get people going, help them move forward: It's about progress, not perfection!
- **Stay adaptable:** Things often don't go as plan, but your job is to make sure participants don't notice the hiccups.
- **Don't slack on snacks:** Keep participants energised with food, coffee, and plenty of snacks!

8. *Judging and Awards*

- **Brief your judges:** Make sure they know the judging criteria to ensure relevance in final selection to your initial purpose.
- **Celebrate the effort:** Don't forget a lively awards ceremony and prizes to recognise achievements and motivate participants.

9. *Wrap Up: What Comes Next?*

- **Identify the "Move On'ers":** Support teams (not just winners) who want to continue developing their ideas.
- **Share the highlights:** Document wins, lessons learned, and key moments to share with stakeholders and mentors.
- **Stay connected:** Be sure to thank participants and partners and provide updates on the hackathon's impact and legacy.

GREAT TOOLS FOR YOUR HACKATHON SUCCESS

Whether you're organising your first hackathon or diving in as a participant, these productivity boosters, development essentials, and free, open-source tools will help you collaborate, create, and deliver your best hacks.

[HackMIT Hackathon Tools - \(https://code.hackmit.org/\)](https://code.hackmit.org/)

A brilliant list of great open-source tools for hackathon coordinators and attendees.

[ngrok - \(https://ngrok.com/\)](https://ngrok.com/)

A reverse tunnel. Run a server locally in any language and give it a public domain. Good for testing and demoing.

[Caffeine \(mac\) - \(https://www.caffeine-app.net\)](https://www.caffeine-app.net)

Make sure your display doesn't turn off or go to sleep during your presentation (we've seen this happen).

[Notion - \(https://www.notion.com/\)](https://www.notion.com/)

Notion is an all-in-one productivity tool that combines note-taking, task management, databases, and collaboration features to streamline personal and team workflows.

[Midjourney - \(https://www.midjourney.com/home\)](https://www.midjourney.com/home)

High-quality, creative images from text prompts, great for rapid prototyping, visual storytelling, and creating design assets to enhance project presentations.

[Vagrant - \(https://www.vagrantup.com/\)](https://www.vagrantup.com/)

*Create and configure lightweight, reproducible, and portable development environments. Don't mess up your dev box by installing all kinds of stuff that might conflict with your existing dev setup. Instead use dev environments like Vagrant or **Docker**.*

[Homebrew \(mac\) - \(https://brew.sh/\)](https://brew.sh/)

Homebrew is the missing package manager for OSX. It installs the stuff you need that Apple didn't install.

[Origami \(mac\) - \(https://origami.design/\)](https://origami.design/)

Origami is a free tool for prototyping. It allows designers to rapidly build and share interactive interfaces.

[Google Drive - \(https://drive.google.com/\)](https://drive.google.com/)

Use Google Drive as a communication and organisational tool to keep the team on the same page. Don't bother emailing or dropboxing.

[Pitcherific - \(https://pitcherific.com/\)](https://pitcherific.com/)

Pitcherific helps in preparing and rehearsing pitches, so you don't have to be all shaky on stage.

[Canva - \(https://www.canva.com/\)](https://www.canva.com/)

Canva is a free-to-use online graphic design tool. Use it to create social media posts for your hackathon, prepare pitches, posters, videos, logos and more.

See many more tools on: <https://nyhackathons.com/tools>





A TALE OF TWO (*VERY DIFFERENT*) XNTC HACKATHONS

We have already heard that one superpower of hackathons is their adaptable character – they can take many shapes and forms. And it so happens that the two hackathons of the XNTC programme played out in strikingly different ways: One focused on student exploration, the other on targeted business outcomes. Here's what we learned from both...

XNTC Hackathon #1: Student Creativity in Action

XNTC joined forces with Aarhus University and the Municipality of Syddjurs to host a hackathon for over 160 students and industry stakeholders. The purpose was to harness student creativity and fresh thinking, applied to tourism industry challenges.

Students received challenges that among others related to challenges of tourism & hospitality in relation to hyper-local food sourcing and production, and related to seasonal challenges of accommodation, especially in relation to generating a sustainable business and steady workforce.

Students worked in multidisciplinary teams to develop ideas to address the challenges, and the final concept included everything from branding campaigns to new concepts for visitor experiences, co-operative models for sustainable food practices, and more.

Key Lessons Learned for XNTC: The hackathon showcased the energy and creativity that student-led innovation can bring to tourism challenges. At the same time, while the ideas were compelling, many of them remained highly localised, limiting their scalability across the Nordic region—an essential focus for XNTC.

In XNTC, a key lesson was to define even more clearly scalability objectives and criteria to underline the cross-Nordic relevance and priority of this programme's purpose.

Why It Worked: This hackathon successfully bridged the gap between university and industry, engaging students in meaningful problem-solving and bringing fresh energy to tourism industry challenges. While the solutions may not have had immediate cross-Nordic applicability, the event demonstrated the value of broad collaboration and the potential for hackathons to surface new ideas and expose students to tourism as an appealing field of innovation and future work.



XNTC Hackathon #2: Business Hacks for Real-World Impact

XNTC partnered with Iceland Tourism Cluster and KLAK – Icelandic Startups to host a hackathon in Reykjavik, bringing together approx. 20 participants with expertise spanning AI and tech, hospitality and tourism, design, and environment.

The hackathon was kick-started by Iceland's Minister of the Ministry of Higher Education, Science and Innovation, underlining the potential of hackathons to really put a topic on the broader agenda and generate both awareness and attention.

For this hackathon, participants were asked to adopt AI and smart technologies to solve challenges relating to sustainable business models, as well as work force & seasonality.

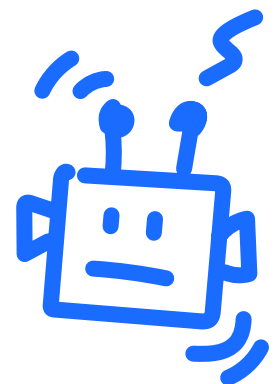
The winning team, Snotra, developed an AI-driven SaaS platform designed to simplify and streamline sustainability reporting for tourism businesses. Their solution directly addressed the EU's Corporate Sustainability Reporting Directive, offering a practical way for businesses to meet regulatory requirements.

Key Lessons Learned for XNTC: Including Artificial Intelligence and smart technologies as part of the hackathon theme and challenge likely attracted a different audience and contributed to the diverse skill sets represented in the hackathon. It introduced tourism as a playing field to test new technology. There was also a prize announced beforehand, which may have further supported professionals in investing their spare time and weekend in participating.

After the hackathon, the process was also very well defined. The winning idea was focused on a follow-up design sprint to further refine the idea, focused on customer development, user interviews, competitor analysis and product idea adjustments. This was further support with input and perspectives from Nordic Standard for Sustainability Reporting (NSRS) and potential customers.

Why It Worked: The themes of this hackathon – tourism, sustainability, AI & smart tech – combined with the promise of a prize, attracted participants with a diverse and interesting mix of skills and expertise. The follow-up sprint ensured the idea wasn't left to stagnate but was pushed forward with guidance from industry standards and customer insights.

See more about the further testing with the winning idea, Snotra, in Chapter 5.



"Show up. Just go. Even if you don't think you have anything to contribute, you never know what might happen. The first time I attended a hackathon, I simply showed up, and it turned out my knowledge aligned perfectly with the solution we developed. When I went to the XNTC hackathon I told my wife I wasn't sure why I was going!"

- in conversation with Vicente Carro, hackathon winner, Snotra, read more on page 73





IDEAS THAT LAST: A HACKATHON SUCCESS STORY

In conversation with Mathias Mølgaard, CEO & Co-founder of Storyhunt

Not all hackathon stories end when the event does. Some ideas take root and grow into real-world success stories. The journey of **Storyhunt** began in 2018 when two students at the IT University of Copenhagen joined a hackathon, organised by Wonderful Copenhagen, armed with a vague idea and an eagerness to explore its potential.

Their idea evolved into Storyhunt, a self-guided audio app designed to help travelers discover hidden gems, learn about local life, and dive into the historical parts of a destination – all at their own pace.

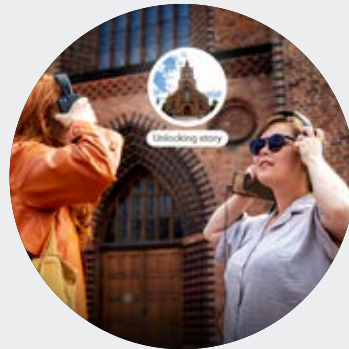
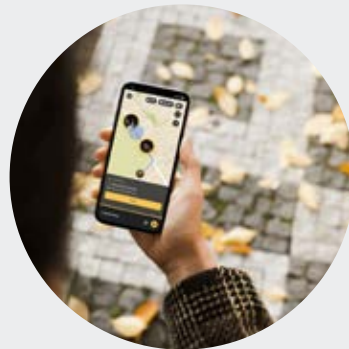
(See more <https://www.storyhunt.io/en>)

While not part of the XNTC hackathons, we have included the Storyhunt journey to illustrate how hackathons can indeed develop ideas with lasting potential and become viable businesses. This case highlights the kind of long-term impact a hackathon can support when opportunity, connections and follow-through come together.

We spoke with Mathias Mølgaard, CEO and Co-founder, to explore their path from hackathon concept to thriving business.

What inspired you to take part in a hackathon?

We had an idea for a product and saw the hackathon as a good chance to test it out. The panel of judges included some influential people, like representatives from Copenhagen Municipality, which we knew might end up being interesting and important for us. It was good exposure to engage with decision-makers directly. We also wanted to find another team member.



The panel of judges included some influential people, like representatives from Copenhagen Municipality, which we knew might end up being interesting and important for us. It was good exposure to engage with decisionmakers directly.



So, you already had an established idea when you joined the hackathon?

We started with a vague idea: A gamified experience for locals to unlock stories around the city. We weren't sure about the business model, but since we both have a technical background, we began building to see if we could apply this technology to the tourism sector.

The hackathon was tourism-focused, and our product morphed into spreading tourism flows of people. While that wasn't our initial goal, we realised our product idea could actually fit this context well. It was a fun challenge, even though we didn't know much about the tourism industry at the time.

How did the hackathon shape your journey in the tourism industry?

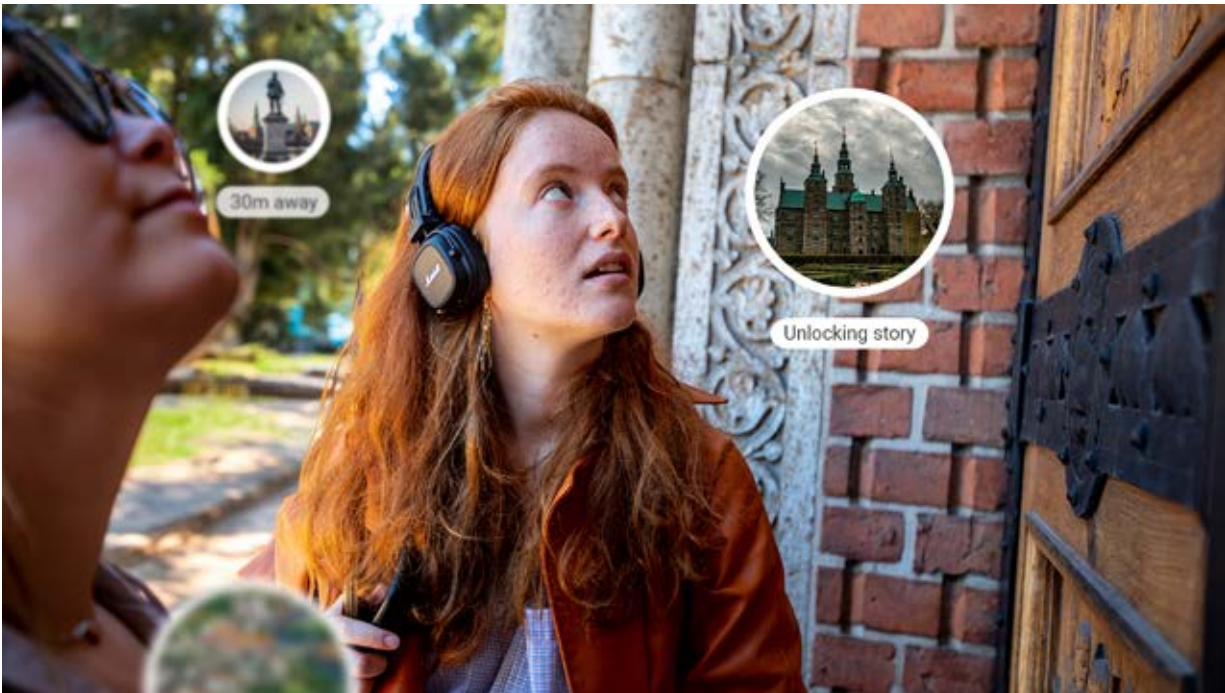
First things first, we learned there were far more stakeholders involved than we initially anticipated! The political elements like distributing travelers across the city as I mentioned before. We didn't realise how much of a priority this was for the municipality. At the end of the hackathon, every team had to present their idea.

Despite coming in third place, someone from the Copenhagen Municipality recognised the potential of our idea and suggested a way to align it with their goals, such as using digital technologies to create engaging experiences that nudge travelers towards less-visited areas of the city. This became part of shaping our product development, like incorporating routes instead of just a collection of stories on a map.

What was it like collaborating with the Municipality?

It was super helpful! They had a deep understanding of travel behaviour, which we lacked. It was a symbiotic relationship in this sense – we brought the technology, and they contributed with insights about travelers.





What were the biggest challenges in transitioning from a hackathon to an actual startup?

It was a quite a gradual process. We were still attending IT University every day, so we had the advantage of student grants (SU), and an environment filled with like-minded people. I actually think universities are really good environments for this, like a kind of startup incubator.

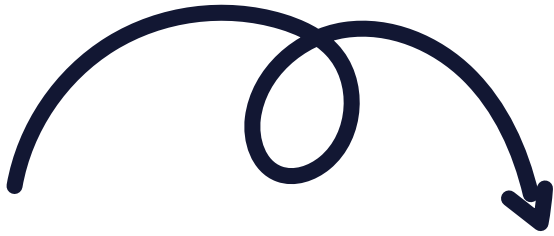
Our first customer was Copenhagen Municipality – a contact we made from attending the hackathon, as I previously mentioned. And then followed the destination organisations (DMOs). So, once we finished our studies, we could go full-time. A big moment was when the municipality created a promotional video trailer for us. It showcased our app and the walking tours, which gave us something really valuable to present to other destinations. That video was an important resource for growing our business.

What makes a hackathon successful?

The host needs to have a clear goal, but saying that, it should also be vague enough to allow participants to interpret it creatively. Go crazy for 48 hours, leave room for personal ideas...

How has it been working with the tourism industry?

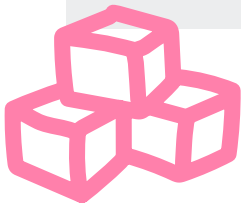
The tourism industry is quite old-school. Many organisations barely use AI, even though there's so much potential to optimise their operations. There's resistance to change, partly because the average age in these organisations is high and change management can be challenging.



My impression is that younger people in the industry often see the potential of AI, but struggle to convince their seniors. It can be frustrating to push for innovation in an industry that prefers doing things the way they've always been done.

What advice would you give to someone considering joining a hackathon?

Hackathons are a great way to test ideas, meet people, and gain exposure to an industry. Even if you don't win, the connections and learnings can be invaluable. That's what happened to us – you never know who you'll meet or what opportunities will come out of it.



SO, ARE HACKATHONS THE RIGHT TOOL?

As the XNTC experience and Storyhunt's journey show, hackathons can bring together the right mix of energy, fresh perspectives, and opportunities for real feedback.

Hackathons can be a challenging fit for time-limited innovation processes that require solutions ready to hit the ground running. Their open, fast-paced, and often messy nature tends to produce early-stage concepts that still need significant refinement before they're ready for real-world testing. Additionally, the teams formed around these ideas are often newly assembled and may require time to solidify and collaborate effectively. Without a strong framework for post-hackathon development, even promising ideas can stagnate.

Before deciding to host or participate in a hackathon, ask yourself:

- Does your challenge need an injection of fresh energy or perspectives?**
- Do you have a clear plan for what happens to ideas after the event?**
- Do you – or partners - have the flexibility, resources, and time to nurture early-stage concepts that still need development?**

Hackathons may not deliver fully developed solutions, but they can still play a crucial role in setting ideas on a path to real-world impact. When paired with a clear purpose and robust post-event support, they offer more than just a burst of energy – they can provide the spark that drives long-term innovation forward.

CHAPTER 4: MAPPING NORDIC STARTUPS IN TOURISM



Mapping the Nordic tourism startup landscape

To move from early-stage ideas to meaningful and relevant industry solutions, you need to understand the broader ecosystem in which you are working. It's intuitive: Innovation doesn't happen in isolation, and in the Nordics, it seems almost obvious that there is potential for innovation to travel the borders – also in terms of tourism solutions.

"Across the Nordics, we share common values, such as a high level of trust, which makes it easier to scale products across the region. We've actually viewed scaling across the Nordics more as an extension of the home market than as an international expansion."

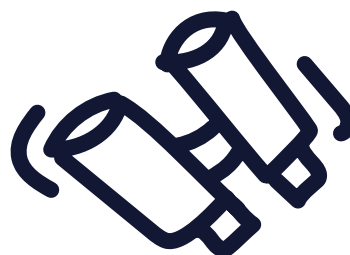
... in conversation with Anders Mogensen, Founder of Founderment, see more on page 56

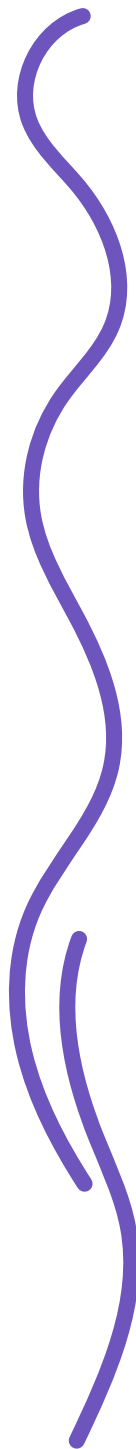


From the start, XNTC has focused on identifying cross-Nordic innovation potential. However, it quickly became clear that a comprehensive, connected cross-Nordic overview of the tourism-related startup landscape was missing.

To bridge this gap, the XNTC programme created a mapping of the Nordic tourism startup landscape, as a tool to search for existing solutions, connecting findings from problem workshops, hackathons, and design sprints with the wider trends.

The mapping now allows us to zoom out across the Nordic landscape, identify patterns and blind spots, and uncover where new solutions and innovation can add the most value to the industry.





A Mapping with Challenges

Mapping the Nordic tourism startup landscape hasn't been without its challenges. The landscape is scattered, largely unclustered, and mostly unmapped – particularly across borders.

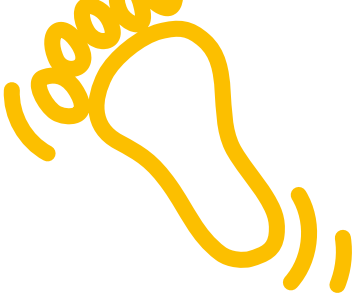
The difficulty also lies with definitions: Unlike sectors such as fintech, proptech, or health tech, where startups are neatly categorised under clear labels, 'travel tech' remains somewhat loosely defined and fragmented across the Nordic region. Furthermore, tourism itself is not a standalone industry but overlaps with multiple other sectors, altogether making it harder to pinpoint and search for startups using standard labels or keywords.

Finally, the startup landscapes change constantly. With most data points collected in the late 2023, this mapping is a snapshot overview with some of the included companies likely already out of the market, and with new ones entered.

As such, the XNTC startup mapping cannot be considered exhaustive, however with data collected on approximately 450 startups across the Nordic tourism eco-system, it provides a good, comprehensive and useful overview of a landscape that has hitherto been underexplored. Perhaps this will be the start of more mappings to come...

In this chapter, you will find:

- A snapshot overview of the Nordic tourism startup ecosystem.
- Insights revealed by the mapping in terms of trends shaping the Nordic tourism startup landscape, and potential opportunity gaps.
- Investor insights from the Nordic tourism landscape.



XNTC MAPPING APPROACH

In line with this Guidebook, this mapping is not a scientific nor statistically exhaustive analysis, but instead a practical, data-driven overview designed to guide firstly, the XNTC search for solutions within the prioritised problem fields of the programme, and hopefully also as a resource to a wider circle of tourism industry stakeholders and policymakers seeking to understand the landscape and identify opportunities across the Nordic tourism ecosystem.

Definitions and Criteria

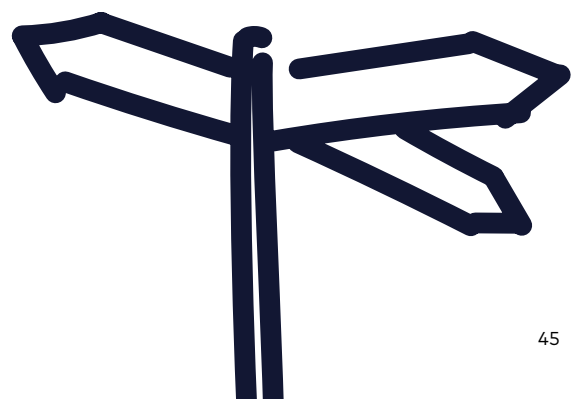
Defining startups in the travel and tourism landscape proved complex, as many companies do not identify explicitly as part of the “visitor economy” or “tourism industry”. Instead, they position themselves within sectors like circular economy, personal mobility, energy efficiency, or sharing economy – though with relevance to and customers within the tourism sector.

For this mapping, we applied the following definition:

- A startup is a growth-focused company offering technology-based solutions or services relevant to travel and tourism.
- Startups need not officially belong to the tourism sector by industry codes but must demonstrate solutions applicable to the visitor economy and tourism industry.
- Growth focus, not age, is key. Startups may be 10+ years old if they are actively scaling through partnerships, investment, and innovation.

When categorising startups, we adopted an approach of referencing a sector and sub-sectors, inspired by Investopedia, where a sector is a distinct part of an economy characterised by specific types of businesses or activities.

Following this definition, the Nordic travel and tourism landscape can be considered as a sector, while the startups analysed in this report fall under a series of subsectors, e.g. technology, sustainability, education, mobility, experience design, etc.





Sources and Data Collection

The mapping relied on publicly available sources and manual screening to ensure data relevance and accuracy. Key sources & steps included:

- **Publicly available databases & startup hubs:** Data was gathered from the databases of startup hubs and lists like [The Hub](#) by Danske Growth Hub, [EU-Startups](#), and [Dealroom](#), and more.
- **Manual screening:** Startups often come and go, making lists and overviews dynamic and, at times, unreliable. Most startups from databases were therefore manually screened, to the extent possible, and enriched by other sources.
- **Merging data:** The XNTC desk research was merged with data from Nordic Traveltech Lab (No), adding 70 companies to the sample after screening for doubles, actuality, and relevance according to the criteria.
- **Local Scouting:** XNTC reached out to several Nordic destination organisations (DMOs), who contributed with lists of startups in their destinations – again screened and entered manually into the mapping.

Given the dynamic nature of startups – many appearing and disappearing quickly – all entries were manually screened to reflect their current status. But as this was mostly done in last half of 2023 (and early 2024), by the time you are reading this Guidebook, the landscape will most likely already have changed somewhat again.

LINKS!

SOURCES USED FOR MAPPING

[Abi.se](#)

[Accelerace.io](#)

[Beststartup.eu](#)

[Bizmaker](#)

[Business Finland](#)

[Business Iceland](#)

[Butterfly.vc](#)

[Dealroom](#)

[estateinnovation.com](#)

[eu-startups.com](#)

[F6s](#)

[Inkubera](#)

[Inova.fo](#)

[Katapult.vc](#)

[Kiaus.com](#)

[Maria.io](#)

[Nordic Travel Tech Lab](#)

[Nukiga Community](#)

[Oslo Dealroom](#)

[Seedtable](#)

[Smart Innovation Norway](#)

[Startup Blink](#)

[Startup Grind](#)

[Startup Norway](#)

[Sting.co](#)

[Sup46.com](#)

[TechBBQ](#)

[Tracxn](#)

[Travel Tech Hunt](#)

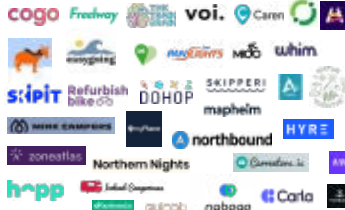
[6am.no](#)



TECHNOLOGY



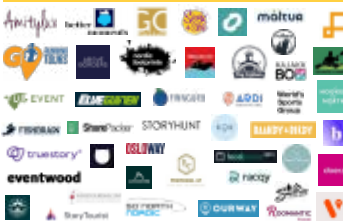
MOBILITY



ONLINE TRAVEL & SEARCH



TOURS & EXPERIENCES



ACCOMMODATION & REAL ESTATE



HOSPITALITY



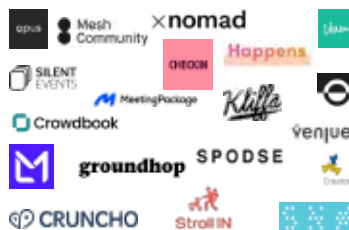
SUSTAINABILITY



FOOD & BEVERAGES



VENUE & EVENT



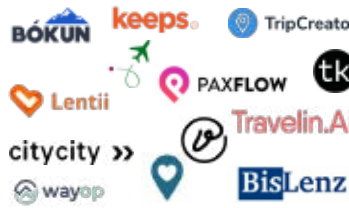
MANUFACTURING & PRODUCTION



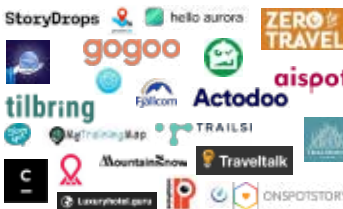
CONSULTANCY & AGENCY



TRAVEL MANAGEMENT SYSTEM



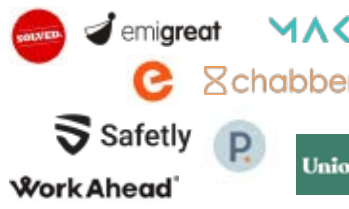
MEDIA & INFORMATION



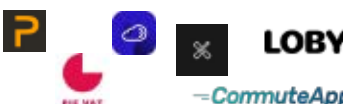
LEGAL & ADMINISTRATION



JOB & HR MANAGEMENT SYSTEM



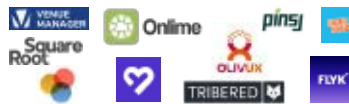
FINANCE



EDUCATION & TRAINING



OTHER





LOOKING ACROSS THE LANDSCAPE

Tourism is a highly diverse industry, encompassing a wide range of sub-sectors — a diversity also reflected in the mapped startup landscape.

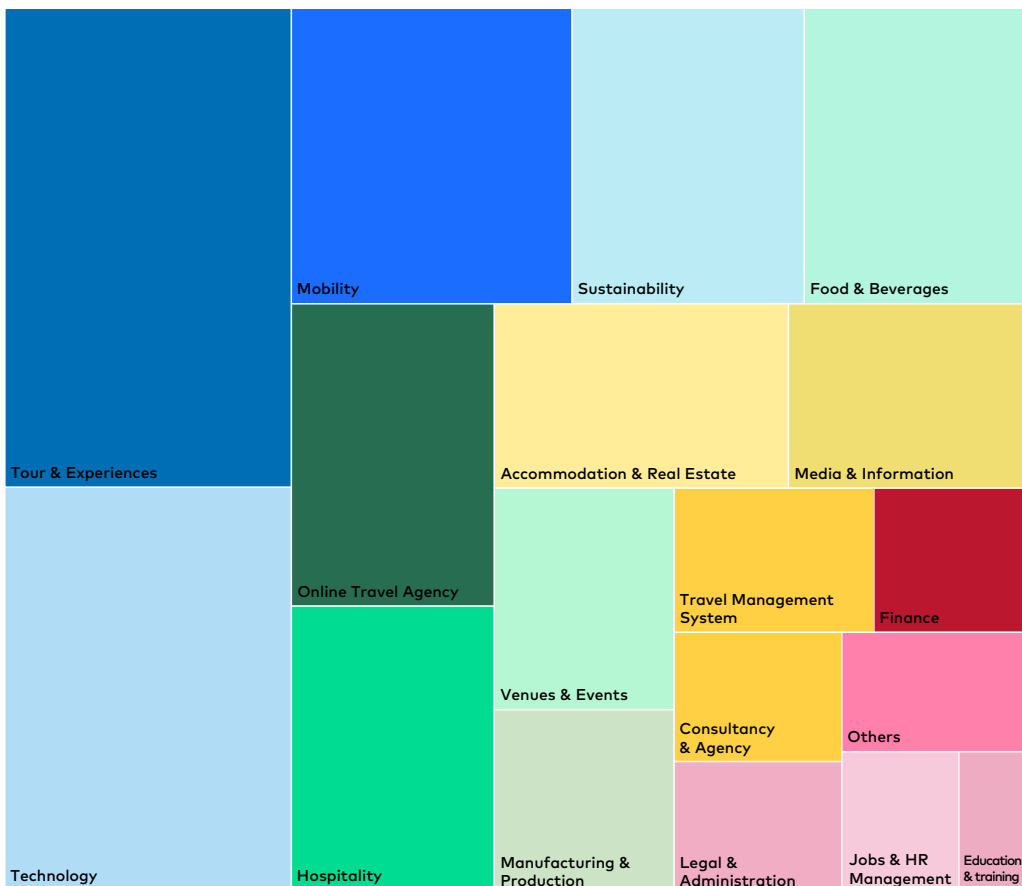
Key sub-sectors within this tourism landscape include technology, experiences, mobility, and sustainability, with 46% of startups falling partly or fully into these categories.

Globally, hospitality and online booking platforms are often dominant within the travel tech landscape. However, in the Nordic region, the highest concentration of startups is found in the *tour & experience* and *technology provider* sub-sectors.

The *sustainability* and *mobility* sub-sectors also take some space in the overall landscape of Nordic tourism startups.

Smaller but notable sub-sectors also emerge, including startups offering organisational solutions like *Legal & Admin*, *Finance*, and *Job & HR Management*.

THE DIFFERENT SUBSECTORS IN THE NORDIC TRAVEL & TOURISM STARTUP LANDSCAPE



n=458. Several startups/companies fall under more than one subsector, which means a company may appear in several categories. Categorisation is based on manual screening.

Nordic Capital Cities as Startup Hubs

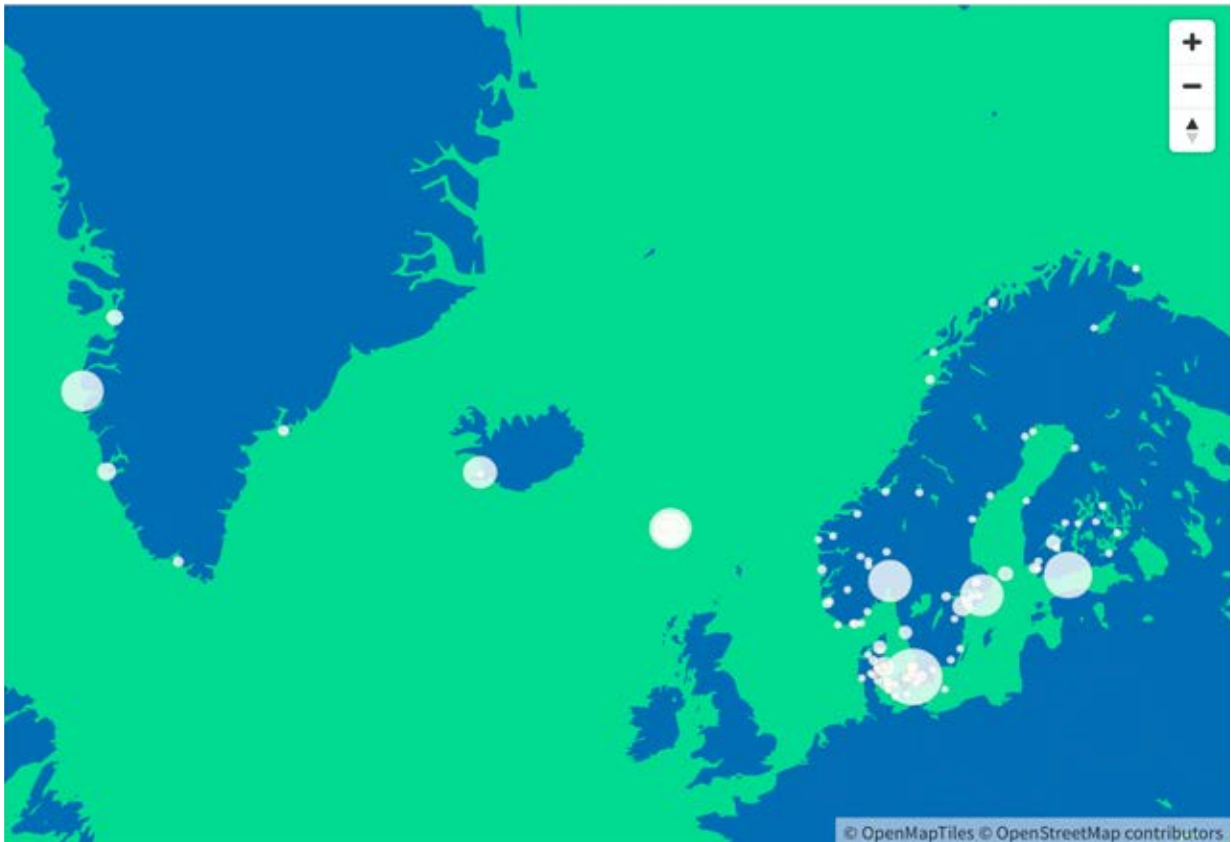
The XNTC mapping reveals a trend: Most Nordic tourism startups are concentrated in and around capital cities, mirroring patterns seen across other sectors outside tourism (Faster Capital, 2024).

This concentration is no surprise. Bigger cities offer startups access to essential resources: advanced technological infrastructure, knowledge hubs, investment opportunities, support networks, and a strong talent pool – all critical factors for growth and innovation, regardless of industry.

That said, startups – and perhaps especially tourism startups – are not limited to urban centers. The location of startups often depends on the nature of a business and the product or service it delivers – and hence with tourism as the common red thread, there are also many tourism startups outside of the major and capital cities.



CLUSTERS OF THE NORDIC TOURISM & TRAVEL STARTUP LANDSCAPE



n=458

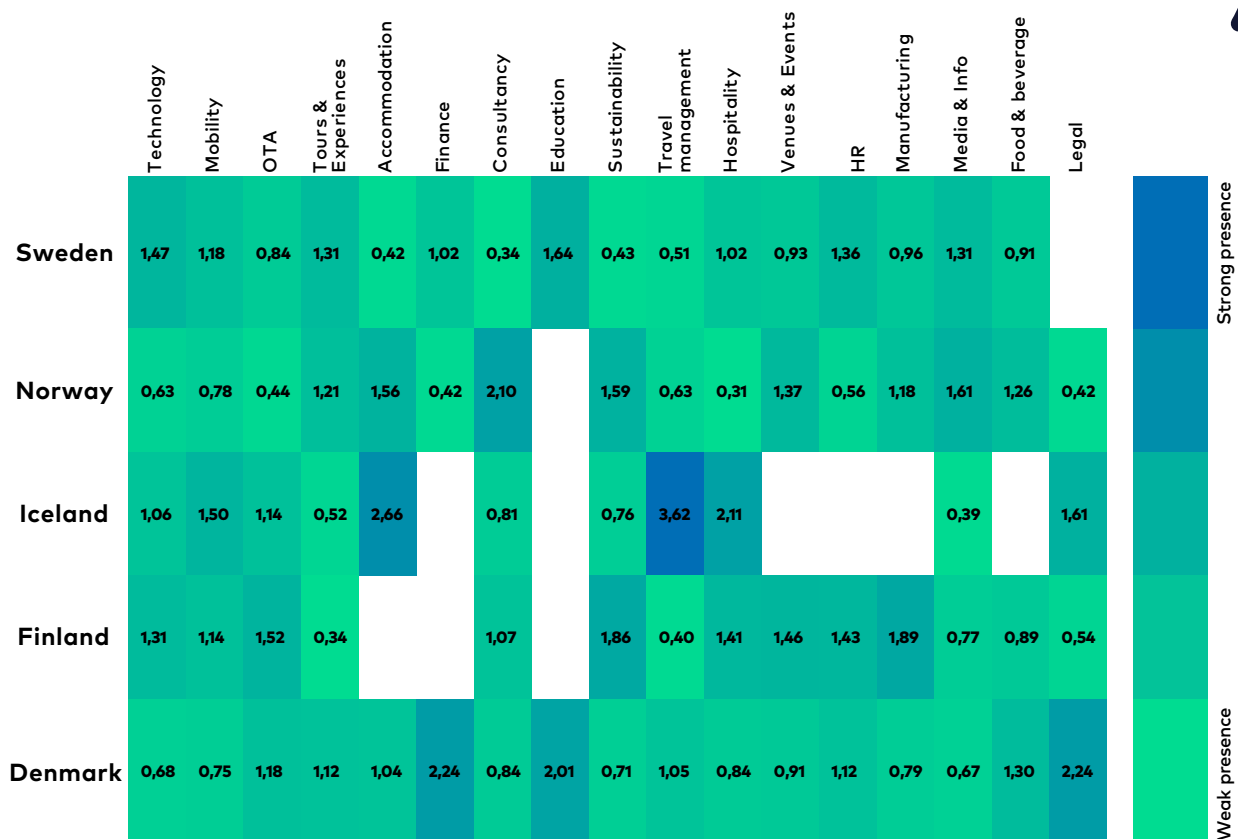
Diverse Sector Strengths

The Nordic tourism startup landscape reveals distinct strengths across countries and regions. Using the Balassa Index – where 1 represents the average or expected value, and higher values indicate specialisation – a heatmap highlights relative concentrations within different sub-sectors across the Nordic countries. So, if a region can show a value 2 in “Finance”, it means that there are double as many start-ups in finance as you would expect to find in an average Nordic region.

Although based on a limited dataset, the heatmap indicates that Iceland has notable specialisation in Accommodation and Travel Management, while other Nordic countries display a broader, less concentrated spread across various sectors, though still with indications of regional differences.

By leveraging each Nordic country's different strengths, the region holds potential to attract different types of investment, talent, and partnerships with potential to strengthen the Nordic tourism startup ecosystem.

HEAT MAP DISTRIBUTION OF NORDIC TRAVEL & TOURISM STARTUPS ACROSS SECTORS BASED ON THE BALASSA INDEX





Big Sectoral Shifts Following the Pandemic

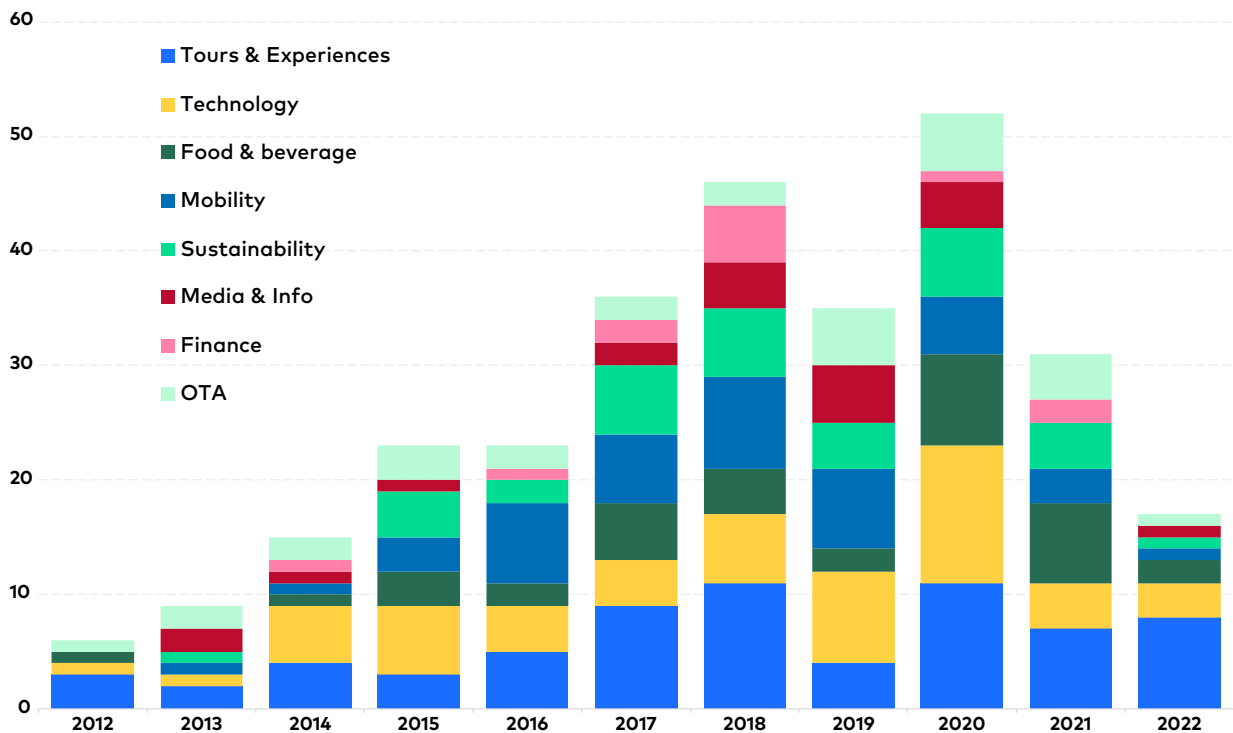
The number of Nordic tourism startups founded across sub-sectors reveals clear trends before, during, and after the COVID-19 pandemic.

Tours & Experiences and *Food & Beverage* startups saw a sharp rise in new ventures before the pandemic, followed by a steep decline when travel restrictions hit. In contrast, *Technology-providing* startups peaked during the pandemic as demand for digital solutions surged to address operational challenges.

Sub-sectors like *Sustainability*, *Media & Information*, and *Finance* experienced steady growth leading up to the pandemic but saw a slowdown during its peak. These shifts highlight how external disruptions can accelerate, stall, or reshape entrepreneurial activity across the tourism and travel startup landscape.



NUMBER OF NORDIC TOURISM & TRAVEL STARTUPS FOUNDED ACROSS SUBSECTORS



Note: Startups from 2023 and onward are excluded as most current startup databases are not fully updated with the more recently founded companies.



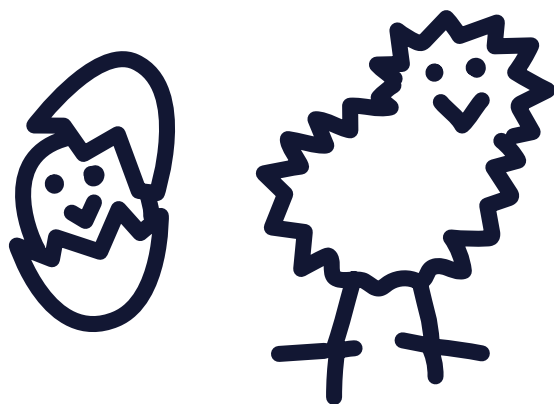
A Sector of Smaller Companies

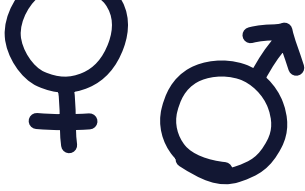
The Nordic tourism startup landscape is predominantly made up of smaller companies. A significant 69% of mapped startups have fewer than 10 employees, suggesting a high concentration of early-stage businesses or a reflection of broader challenges in scaling tourism businesses, possibly driven by economic, social, or structural factors specific to the Nordic tourism market.

In the mid-range, 26% of startups have fewer than 50 employees, representing those who have begun to scale but remain relatively small. At the top end, 5% of startups in the mapping employ more than 250 people, likely reflecting successful scale-ups that have managed to innovate, address market gaps, and grow significantly.

The large proportion of micro-sized startups (fewer than 10 employees) raises questions about a potential growth ceiling within the tourism sector. Whether due to market size, funding limitations, or other barriers, this trend may constrain expansion opportunities for Nordic travel and tourism startups.

Further comparative research with other regions could provide valuable insights into the factors influencing growth and scalability, shedding light on opportunities to better support startup development and long-term success in the cross-Nordic market.





Female Founders in Tourism

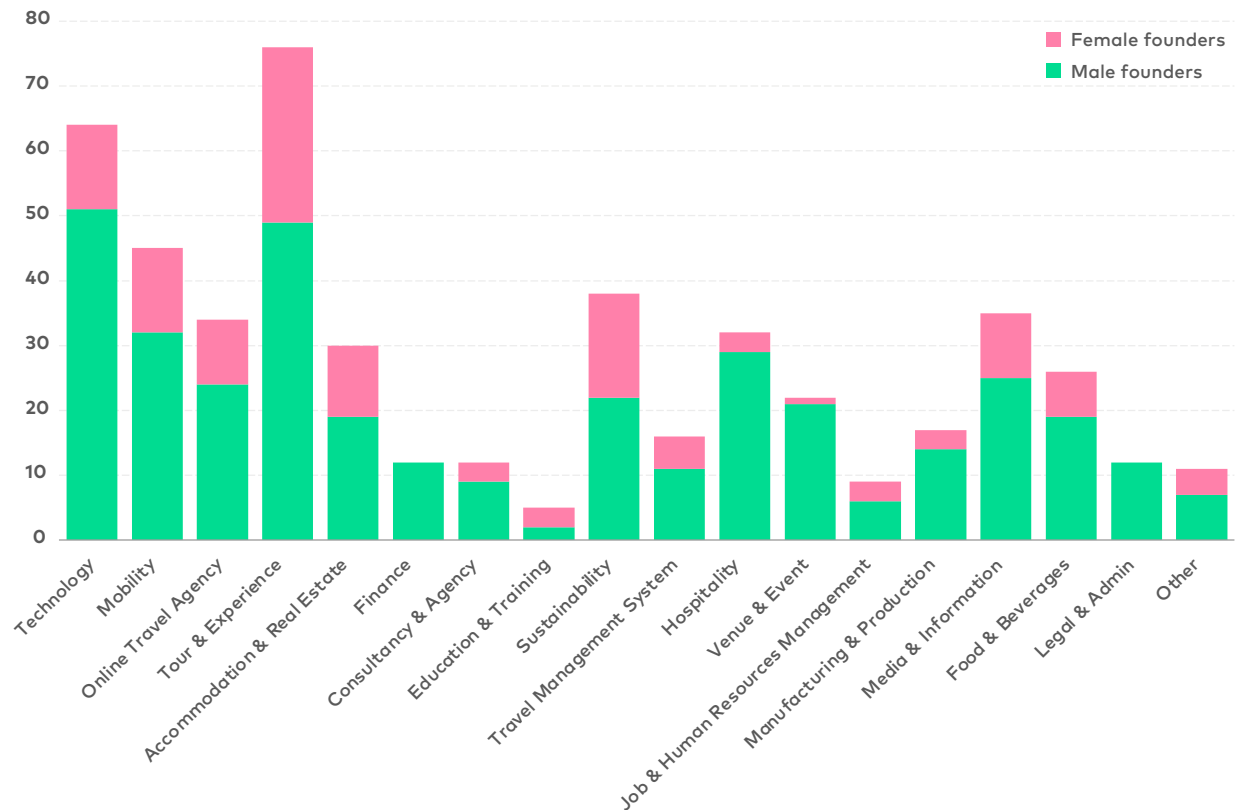
In 2023, nearly 25% of all startups in Finland, Norway, and Denmark had female founders, highlighting a gender gap as approximately three-quarters of mapped travel and tourism startups are founded by men.

Interestingly, Iceland, despite being consistently ranked the world's most gender-equal country (World Economic Forum, 2023), appear to record the lowest share of female-founded tourism startups in this mapping at just 17%.

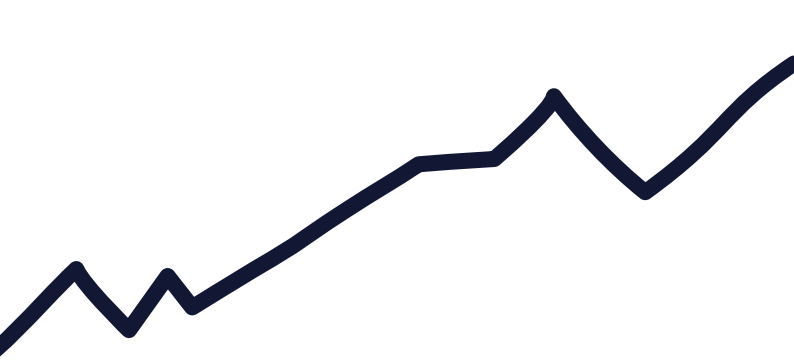
Across sub-sectors, male founders dominate in all categories, though the size of the gender gap varies. Sub-sectors such as Technology Providers, Venue & Event, Hospitality, Finance, and Legal & Administration show the widest disparities. In contrast, sectors like Education & Training, Sustainability, and Tour & Experience have the highest percentages of female founders.

The findings reveal a clear gender imbalance within the Nordic tourism startup landscape. Greater focus on gender diversity, particularly in sub-sectors with significant gaps, is needed to foster a more inclusive, competitive, and innovative startup ecosystem.

FEMALE AND MALE TRAVEL STARTUP FOUNDERS ACROSS CATEGORIES IN THE NORDICS, 1991-2023



n=384. Data from companies founded between 1991-2023. Data doesn't include Greenland, the Faroe Islands, and Åland



INVESTING IN NORDIC TOURISM STARTUPS: A NICHE?

To complement the cross-Nordic startup mapping, this section explores the investor landscape in Nordic tourism. This involves firstly an overall scan of the landscape, as well as an interview with one of the highlighted investors.

Scanning VC trends in Nordic Tourism

The findings of the investor scan reveal a key challenge: Only a small handful of venture capital (VC) funds focus directly on travel and tourism. A notable exception is the Danish fund *Founderment*, which, as of December 2023, had made five investments in the tourism industry.

Interestingly, tourism and travel tech startups are often categorised under broader and more established labels like SaaS, Fintech, or Mobility in fund portfolios. While this approach increases their chances of securing funding, it also makes tourism-focused investments less visible, potentially distorting perceptions of investor interest in the sector.

When looking at specific investments, a clear trend emerges: Investors gravitate toward technology-driven startups with strong scalability and global market potential (see table 1). This preference reflects the growth expectations of VC funding and highlights the challenges faced by more traditional tourism business models in attracting investment.

Table 1: Nordic startups and their investors

Start-up name	Investors	Country	Round type	Source
Landfolk	Founderment, Seed Capital	DK	Seed	Link
BeCause	Ugly Duckling	DK	Preseed	Link
Holdbar	Firstminute capital	DK	Seed	Link
Campanyon	start-upLab and angels	NO	Preseed	Link
Asistobe	DSD, Valinor	NO	Preseed	Link
Choose.Today	Genzero	NO	A-round	Link
Acamp	Spintop	SE	Preseed	Link
Fast Travel Games	Brightly Ventures	SE	Seed	Link
Allihop	Rockstart	SE	Preseed	Link
Stayify	Angel investors	FI	Angel round	Link
Reveel	Inventure and Angels	FI	Preseed	Link
Bob W	Evli Growth Partners	FI	Growth	Link
Travelshift	General Electric	IS	Growth	Link
PaxFlow	Brunnur	IS	Seed	Link



Table 2: Leading active investors in Nordic tourism & travel

Investor	Country	Tourism Investment	Website
Founderment	DK	Landfolk, Holdbar, Raus, Pere	Link
Seed Capital	DK	Landfolk, Holdbar	Link
Ugly Duckling	DK	BeCause	Link
start-upLab	NO	Campanyon, Favrit	Link
Shibsted Growth	NO	Campanyon	Link
Katapult	NO	Brim Explorer	Link
Almi Invest	SE	Handiscover	Link
Backing Minds	SE	Campcation, Mylla	Link
Spintop Ventures	SE	Acamp	Link
Icebreaker.vc	FI	Valpas	Link
Inventure	FI	Reveel	Link
Vendep	FI	Hostaway	Link
Brunnur	IS	PaxFlow	Link
Frumtak Ventures	IS	Kaptio	Link
Crowberry	IS	Greenbytes	Link

DENMARK



NORWAY



SWEDEN



FINLAND



ICELAND





SCALING TOURISM INNOVATION: A NORDIC DILEMMA?

*In conversation with **Anders Mogensen**, Founder of *Founderment**

The Nordic region holds potential to become a leader in sustainable and tech-driven tourism innovation. Anders Mogensen, Founder of *Founderment* — an early-stage VC fund — shares his insights on where the opportunities lie, what makes tourism startups investable, and how technology is shaping the next chapter of the industry.

For you as an investor, why does tourism stand out as a promising area for investment?

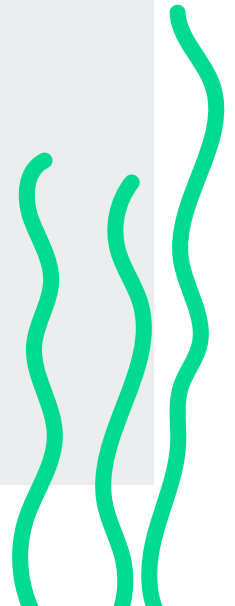
The industry has become more open to digital transformation in recent years. Historically, the digital offerings in the industry were controlled by a few large players, but digitalisation has recently opened the market to new entrants.

In our case, we've invested in a company called Holdbar, which offers tourism companies a much more customised digital solution. It handles both the digital and practical needs of companies like hotels, tour operators, and travel experience providers.

What makes Nordic tourism and travel tech startups interesting to invest in?

Well, the Nordics aren't inherently interesting to us as a venture capital company ... Everything we invest in must have the potential to scale beyond the Nordic countries – even outside the European market. The Nordics are, however, a great market to launch a company, especially for consumer-facing solutions.

We've seen a momentum for applications that attract new tourists to the region when it highlights special hospitality opportunities. In our portfolio, for example, we have Landfolk, which provides access to high-quality and unique rentals – some of which weren't even available on the market before! For these kinds of solutions, the Nordics serve as a great launchpad. Saying that, it's crucial to take the next steps beyond the Nordic market soon after achieving product-market fit in the region.



Everything we invest in must have the potential to scale beyond the Nordic countries – even outside the European market. The Nordics are, however, a great market to launch a company, especially for consumer-facing solutions.

In your view, what unique characteristics define the Nordic market, and how do they impact scaling strategies for startups?

Across the Nordics, we share common values, such as a high level of trust, which makes it easier to scale products across the region. We've actually viewed scaling across the Nordics more as an extension of the home market than as an international expansion.

However, this homogeneity can also be a weakness. You might end up building something that is hard to scale outside the Nordics. Sometimes we see this limitation reflected in founders' mindsets. They might think, "If we've nailed our home market and launched in other Nordic countries, we've made it." But that's rarely enough to make a startup interesting for us as a venture capital firm.

What challenges do startups face when raising funds for international growth after proving their potential in the Nordic region? And is it hard for you as a venture fund to help your portfolio raise funding?

Yes, definitely! Tourism isn't the most attractive industry for investors, and this holds us back from doubling down on it. I think this is largely because many startups in the space lack the grandiosity, we see in other B2B SaaS products. It's rare to find Nordic travel tech startups with a mindset to change the world. More often, they focus on incremental improvements, like making trip searches easier. That vision is too limited for a venture journey today.

Has the tourism industry reached a plateau in innovation, or are there untapped opportunities for startups to disrupt the market?

The tourism industry tends to be industry-first and tech-second – but maybe it should be the other way around. What I mean is that we shouldn't be limited by the normal boundaries of the tourism industry. There is a glass ceiling in the industry, and it's mainly created by the industry itself. Overcoming this requires building grander visions that go beyond current limitations. Sometimes, scaling may even involve tapping into adjacent industries to build something big enough for the long term. I fear the Nordic tourism industry could become its own limitation.



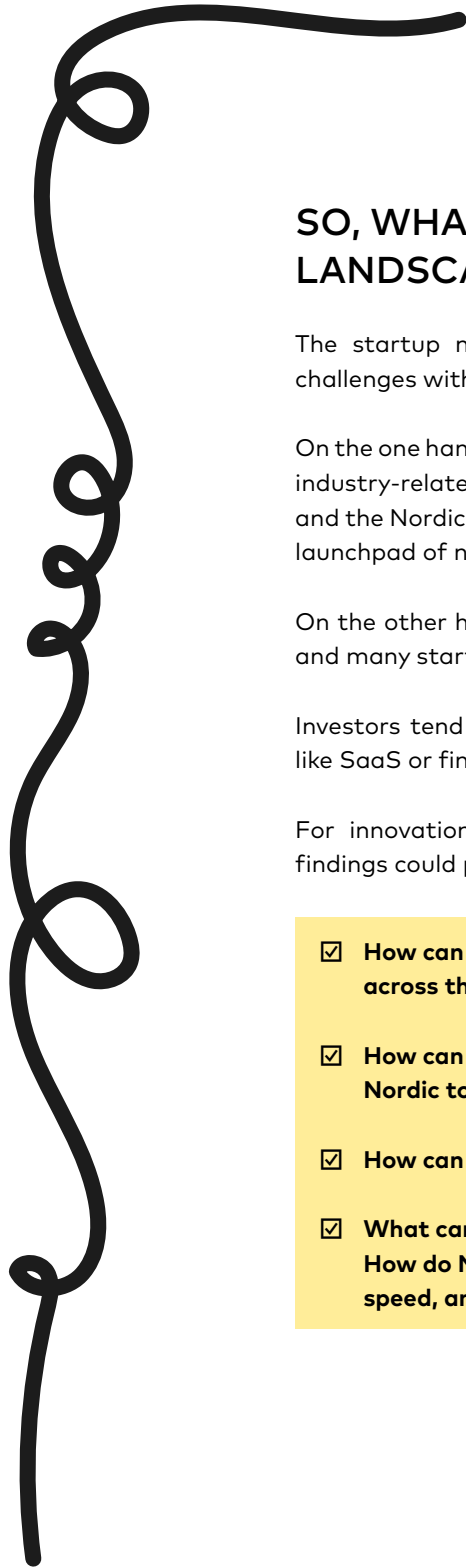
How can the Nordic tourism industry overcome its limitations to attract more substantial venture capital investment?

We need a higher degree of innovation and for industry players to focus more on this. Moving beyond local and industry-specific thinking is crucial to creating new startup category leaders. For example, in Holdbar (our portfolio company), we see the potential for them to become the Shopify of the tourism industry - a central hub that allows others to tap into the market. That is a grand vision and something that excites venture capitalists. Startups need to break out of traditional trajectories, and travel tech cases have struggled to prove this to us and other investors.

It will be interesting to see how travel tech evolves with the latest advancements in technology, like AI. With AI we see a lot of innovation in other industries, but in the tourism industry it's, well, not substantial innovation - but merely small incremental improvements - rarely something that would really excite a venture capital fund. Looking ahead to technologies such as quantum computing, which show promise in other industries, it's also hard to predict how they might move the needle here in the tourism industry. Nonetheless, we're eager to follow and support this development if it comes with greater visions to strengthen not just the Nordic, but the global market.

...many startups in the space lack the grandiosity, we see in other B2B SaaS products. It's rare to find Nordic travel tech startups with a mindset to change the world.





SO, WHAT DID WE LEARN FROM MAPPING THE LANDSCAPE?

The startup mapping and investor scan shed light on opportunities and challenges within the Nordic tourism startup ecosystem.

On the one hand, the region is rich with diversity and innovation across different industry-related sub-sectors. Technology-driven solutions are gaining ground, and the Nordics can serve as a larger extended home-market and hence strong launchpad of new solutions.

On the other hand, significant barriers remain. The ecosystem is fragmented, and many startups struggle to scale – both within the Nordics and beyond.

Investors tend to prioritise solutions that fit broader, established categories like SaaS or fintech, leaving tourism-specific innovations less visible.

For innovation programme leaders and Nordic ecosystem builders, these findings could point to three critical questions to ask yourselves:

- ☑ **How can you support Nordic startups in testing and scaling across the Nordic region? And later beyond the Nordics?**
- ☑ **How can you help bridge the fragmented Nordic tourism startup ecosystem?**
- ☑ **How can you better showcase tourism startups to investors?**
- ☑ **What can we learn from global tourism innovation ecosystems? How do Nordic startups compare in technology adoption, scaling speed, and investment traction?**

SOURCES FOR DATA ANALYSIS



AVERAGE TIME TO REACH PROFITABILITY AT A STARTUP – Zippia
(<https://www.zippia.com/advice/start-up-profitability-statistics/>)

Carta 2024: A sector-by-sector guide to the gender gap among startup founders
(<https://carta.com/data/gender-gap-by-sector-2023/>)

Choose the right location for your startup – Faster Capital
(<https://fastercapital.com/content/Choose-the-Right-Location-for-Your-Startup.html>)

Global Gender Gap 2023 - World Economic Forum
(https://www3.weforum.org/docs/WEF_GGGR_2023.pdf)

Global startup Ecosystem Index 2023 - startup Blink
(<https://techbbq.dk/wp-content/uploads/2023/09/Startup-Blink-GSEI-2023.pdf>)

Gender parity: Here's what leading countries are getting right – World Economic Forum, 2023
(<https://www.weforum.org/stories/2023/06/global-gender-gap-parity/>)

Innovation Lab Asia - A Guide to Nordic Innovation
(https://innovationlabasia.dk/wp-content/uploads/ILA-report_Nordic-ecosystem_FINAL.pdf)

Nordic Impact startups 2023 - Dealroom, Danske Bank Growth, and Stockholm
(<https://danskebankgrowth.com/-/media/danske-bank-com/pdf/growth/nordic-impact-startups-2023.pdf>)

Nordic startup Employment 2023 - Dealroom & Danske Growth
(<https://dealroom.co/uploaded/2023/09/Nordic-Startup-Jobs-2023-4.pdf?x67760>)

Startup Surge: Pandemic Causes New Businesses To Double – Forbes
(<https://www.forbes.com/councils/theyec/2021/01/20/startup-surge-pandemic-causes-new-businesses-to-double/>)

Travel and Tourism Tech Startup Ecosystem and Investment Landscape - UNWTO
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What Is an Economic Sector and How Do the 4 Main Types Work? Investopedia
(<https://www.investopedia.com/terms/s/sector.asp>)

What is the average lifespan of a startup? Faster Capital
(<https://fastercapital.com/questions/what-is-the-average-lifespan-of-a-startup.html>)

What is a startup? the Hub definition - The Hub
(<https://insights.thehub.io/insight/what-is-a-startup-the-hub-definition/>)



Photo: from top Tobias Hågg / Visit Swedish Lapland, Anders Vestergaard Jensen, Silje Bergum Kinsten / norden.org

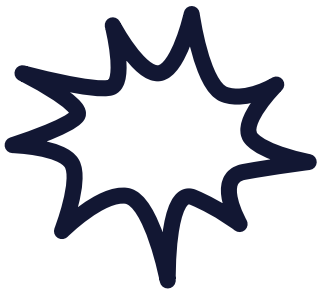
CHAPTER 5: TESTING SOLUTIONS



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Why testing is always right, even when it goes wrong

Testing is where solutions step out of the conceptual phase and into the unpredictability of the real world. It's not just about validating what you think works; it's about discovering what you don't know yet. Testing is where ideas are challenged, refined, strengthened, and maybe even scrapped.



But testing isn't always straightforward. The XNTC experience highlights that successful testing lives in paradox: you need focus and flexibility, structure and room for failure, commitment to your idea and openness to abandoning it. Test too early, and surface-level issues may dominate feedback. Test too late, and unchallenged ideas risk becoming overdeveloped without proof of value.

"The tourism industry proved to be a great, and extreme place for testing. It's not bogged down by heavy compliance, which gave us room to try out new approaches, but it is also incredibly challenging as it is an industry which deals primarily with immediate business concerns, so, finding ways to make cybersecurity feel accessible and worth their time was critical".

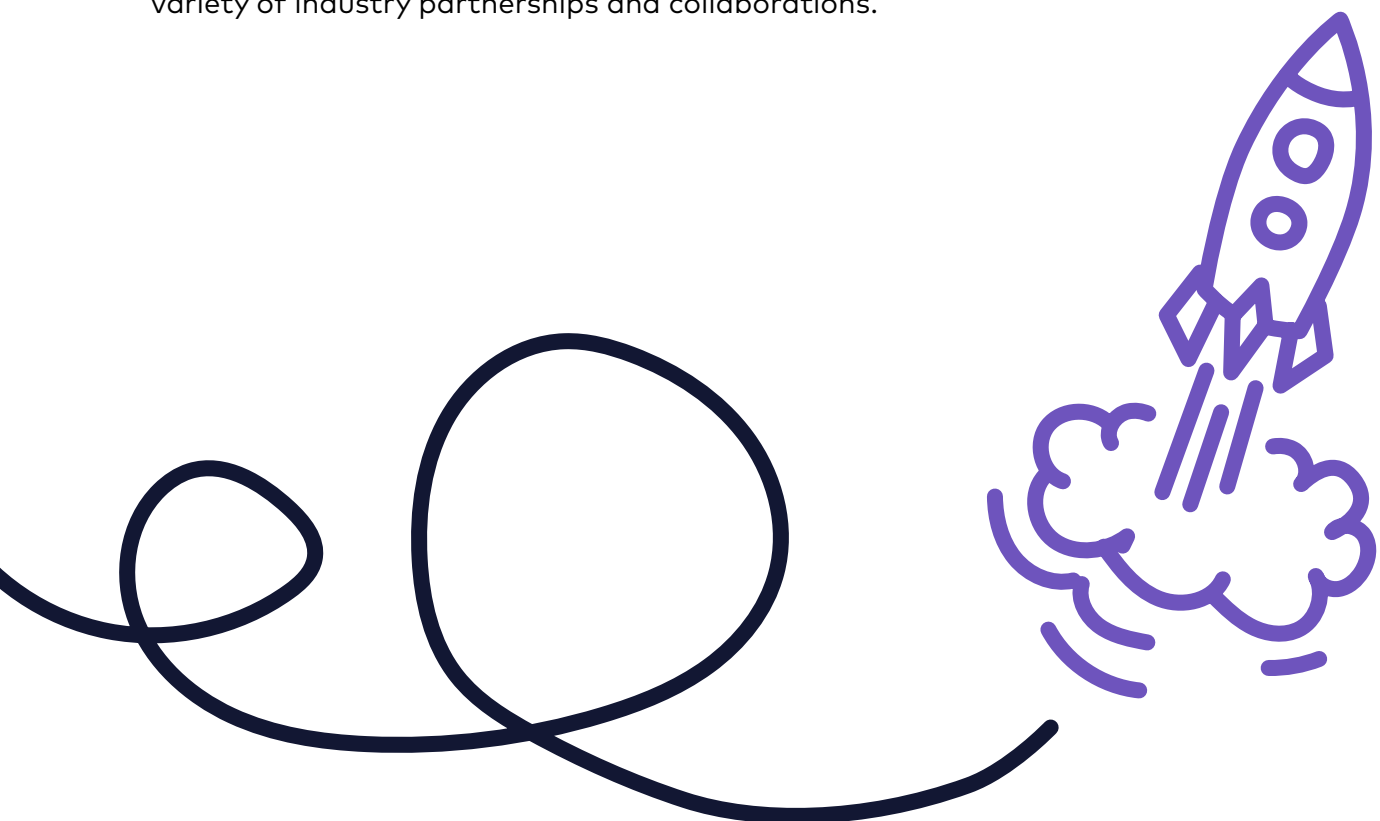
... in conversation with Eskil Sørensen, CEO & Founder, Cybercue see more on Page 84



You need to test in the real world, which in this case involves a tourism industry sometimes characterised by tight margins and risk-averse decision makers. While some solutions solve problems that the tourism industry and businesses already recognise, other solutions address emerging challenges or needs that the industry has yet to understand and feel. Testing the latter solutions can be a difficult sell in a sector that is relationship-driven, resource-constrained, and hesitant to take risks on unproven ideas.

In this chapter, we explore different approaches to testing: From designing the right test and identifying the optimal test environment, to the challenges of matchmaking with the tourism industry. We examine the nuances of testing completely new solutions – born out of a hackathon – and validating, perhaps introducing, more mature solutions to new markets.

We'll look at different approaches to testing, matchmaking with the industry and bridging the gap between solutions and the sometimes-cautious tourism industry, and finally, we will dive deep into the XNTC experiences of real-world test examples across different stages of solution and market readiness, in a variety of industry partnerships and collaborations.



QUICK OVERVIEW: XNTC Testing Solutions

A quick overview of the main XNTC test activities:

<i>Name of startup</i>	<i>Overall x-Nordic challenge</i>	<i>Test purpose</i>	<i>Origin country & Test market</i>
Snotra <i>(hackathon winner)</i>	Sustainable business models	Develop & test MVP for AI-powered ESG reporting for tourism SMEs.	Iceland / Sweden
Cybercue	Digitalisation & tech	Adapt and test cybersecurity product for tourism industry awareness and feedback.	Denmark / Denmark
TiimoApp	Inclusivity & accessibility	Integrate and test individual planner tool for business travellers / event delegates with neurodivergent needs.	Denmark / Denmark
Cappy	Work attraction & retention: Seasonality	Adapt tool from other industries for financial wellness to test for impact on employee retention and engagement in tourism – especially for seasonal workers.	Sweden / Sweden
All Gravy	Workforce attraction & retention: Younger generations	Adapt tool from other industries for financial wellness to test for impact on employee retention and engagement in tourism – especially for younger workers.	Denmark / Nordics
FasterForward	Accessibility	Test simple non-tech models for motivating the market.	Sweden / Sweden



THE TEST OF TESTING FOR TOURISM INNOVATION

Testing is not a one-size-fits-all process. Whether exploring a completely new concept, validating an MVP, or fine-tuning an established product, the test method chosen should align with **testing goals** and the **stage of innovation**. Some tests aim to uncover awareness or validate assumptions, while others assess a solution's fit or readiness for the market.


Here is **a list of approaches** to designing tests for tourism innovation. This is again not an exhaustive list, and some of the approaches overlap and are certainly complementary to each other. All of these approaches have been applied in one shape or form throughout the XNTC programme:

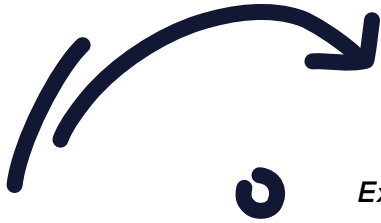
Discovery Testing

Discovery testing explores the problem space and potential solutions to uncover unknowns and validate assumptions. This means to understand the context, user needs, and challenges in more depth, before committing to a solution.

- **Focus:** Identifying and uncovering real problems within the industry
- **Purpose:** Explore untested assumptions and validate whether a problem exists or is significant enough to solve.
- Approach:
 - Conduct qualitative research through interviews, workshops, or surveys.
 - Explore user pain points, behaviors, and trends.
 - Look for signals of unmet needs or hidden opportunities.
- **Stage:** Very early stage; often before a solution is even developed.

Awareness Testing

- **Focus:** Assessing whether stakeholders recognise the problem you aim to solve.
 - **Purpose:** Validate industry awareness and determine if education or framing is required before introducing the solution.
 - Approach:
 - Surveys, focus groups, and stakeholder interviews to measure awareness.
 - Use pilots or presentations to highlight the problem's urgency.
 - Identify gaps where stakeholders don't yet "see" the problem or its impact.
 - **Stage:** Early stage; after identifying a problem and before investing heavily in solution development.
- 



Experimentation

- **Focus:** Testing creative or unproven solutions to uncover new opportunities or applications.
- **Purpose:** Challenge assumptions, explore innovative ideas, and stretch the boundaries of a solution's use cases.
- Approach:
 - Design small-scale, low-risk experiments to test hypotheses.
 - Introduce solutions to unexpected or adjacent markets to assess applicability.
 - Use "fail fast" strategies to learn and pivot quickly based on results.
- **Stage:** Flexible, can occur at any stage, especially when tackling complex or emerging challenges.



MVP (Minimum Viable Product) & Prototyping

- **Focus:** Delivering a simple, functional version of the product with minimal features.
- **Purpose:** Validate core functionality, determine user interest, and avoid overbuilding.
- Approach:
 - Launch a basic version of the product.
 - Test with a small group of target users to assess value and collect feedback.
 - Prioritize only essential features that address the core problem.
- **Stage:** Early to mid-stage, when you need validation before scaling up.



Iterative Prototyping

- **Focus:** Refining a product through repeated cycles of feedback, testing, and adjustments.
- **Purpose:** Align product with diverse market needs, improve usability, and optimise adoption.
- Approach:
 - Build successive prototypes.
 - Collect targeted feedback at each stage and implement incremental changes.
 - Test regionally or across specific user segments to adapt to requirements.
- **Stage:** Mid to late stage, when refining features or scaling to new contexts.



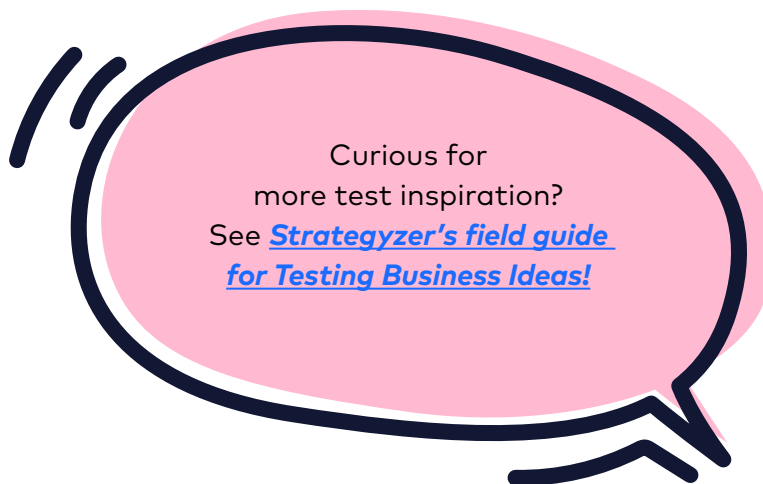
Feedback Testing

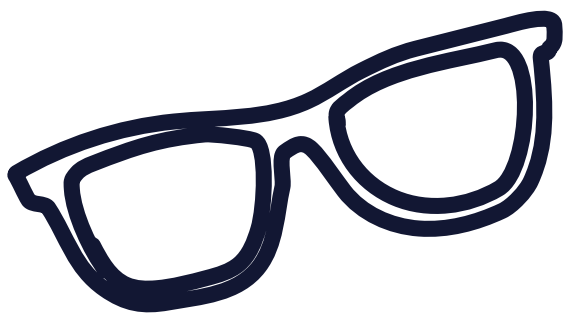
- **Focus:** Collecting insights and reactions from users interacting with a product or concept.
- **Purpose:** Gather feedback, build trust, and identify barriers to adoption.
- **Approach:**
 - Use pilots, beta tests, or focus groups to introduce the product to stakeholders.
 - Collect structured and informal feedback on usability, functionality, and user satisfaction.
 - Address challenges or areas for improvement based on feedback.
- **Stage:** Mid-stage, after a prototype or MVP exists but before full-scale launch.



Market Validation

- **Focus:** Confirming that the product has demand, viability, and market fit.
- **Purpose:** Validate whether the solution solves a real problem and resonates with the target market.
- **Approach:**
 - Conduct pilot projects or trials with real businesses to assess demand.
 - Measure adoption rates, willingness to pay, and value delivery.
 - Identify market potential through usage metrics and customer feedback.
- **Stage:** Later stage, when moving from prototype to product launch.





WHEN TESTING GOT REAL

As the XNTC programme kickstarted testing solutions, most of the testing methods and approaches described above were applied in different contexts and combinations.

Before diving into the learnings of testing, the below describes the different testing approaches put into practice together with startups.

From Hackathon to MVP

Following their success as the XNTC hackathon winner, Snotra focused on developing and testing a Minimum Viable Product (MVP) through iterative prototyping. Early-stage concepts like Snotra rely on continuous stakeholder feedback to validate feasibility and refine market fit.

The approach involved creating a streamlined version of the product and testing it with a select group of tourism businesses to evaluate its value, identify key functionalities, and gather insights for further development.

Adapting Existing Solutions to Tourism

With startups like Cappy and All Gravy, the XNTC testing focused on matchmaking these existing solutions with established tourism stakeholders across the Nordics. The goal was to gather real-world feedback and further validate their products' relevance to the tourism industry.

Testing approaches included pilots, feedback loops, and industry trials to refine solutions for their new context. Importantly, much of the dialogue with stakeholders also centered around discovery and awareness — helping the tourism industry recognise how these solutions could address their specific challenges.

In the case of All Gravy, for example, direct engagement with stakeholders allowed the team to listen to specific industry needs and adapt their product accordingly — adapting in a way that made their solution more readily appealing for the matched tourism business.



A Much-Needed Solution for An Unaware Market

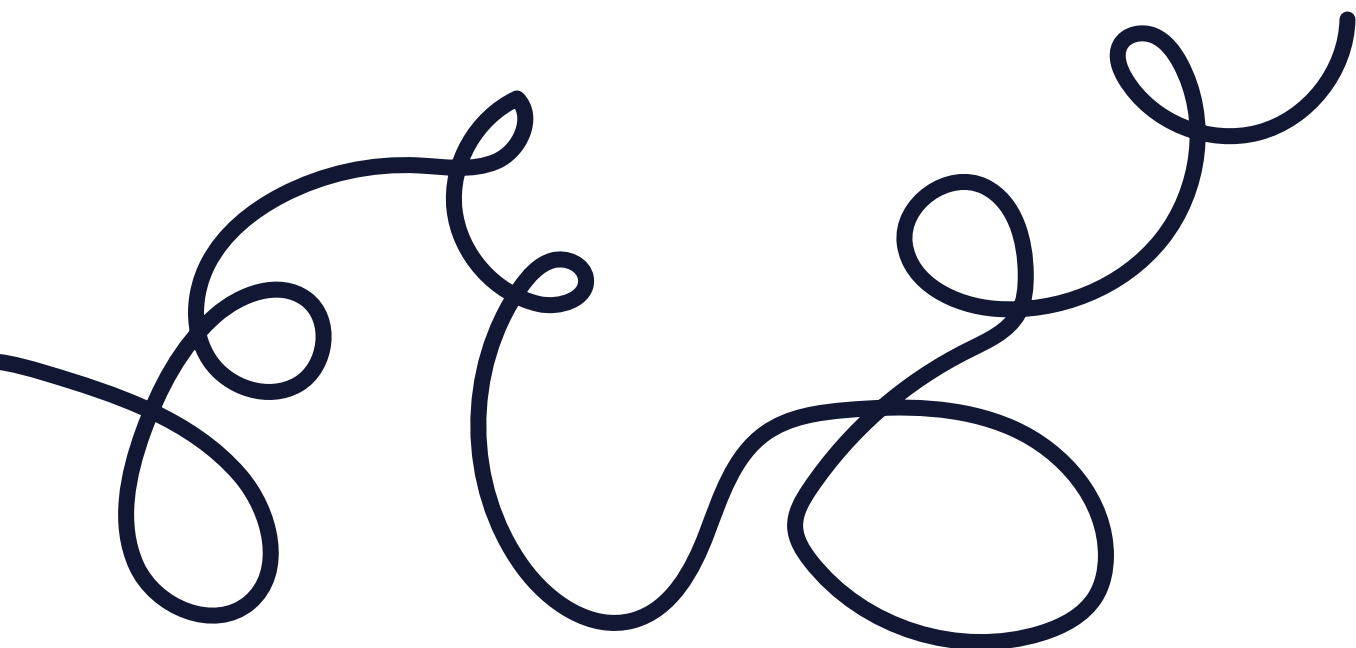
With Cybercue, the XNTC testing focused on embedding an existing cybersecurity solution into the tourism sector — a market, which quickly revealed very low awareness of cyber risks. The aim was to validate the product's relevance and demonstrate its value while building industry recognition for the problem.

Testing approaches included testing with tourism businesses, simulating active use cases to validate fit and value, collecting qualitative insights to identify barriers to adoption and value, and refine solutions.

Testing for Inclusion and Awareness

With Tiimo App, XNTC testing began with a focus on feedback testing, exploring if and how the planner tool for neurodivergent individuals could support event delegates in attending industry events, and hence also support neuroinclusive event design.

The testing approach included a pilot trial during a big industry event to gather feedback through targeted surveys. However, findings revealed a need for discovery and awareness testing within Nordic tourism – to gain a better understanding of user needs, increase market awareness of the potential of inclusive design.





FINDINGS THAT PASSED THE TEST

This chapter explores the real-life experiences of startups testing their innovations in the tourism industry, highlighting four key challenges they faced during the XNTC process.

While not every test of the XNTC was a success in the traditional sense (some tests never made it to the actual testing), each test tracks offered valuable insights and lessons for the startups, the industry, and future programs like XNTC.

In this chapter, we will highlight those lessons and insights in four main sections of how to...

- **1. Build from Scratch**
Understanding the hurdles of creating something entirely new, from validating early concepts, coming together as a new team, to engaging tourism businesses without a fully realized product.
- **2. Design for Inclusion**
From addressing the needs of neurodivergent individuals to fostering accessible and equitable tourism experiences, we explore what it means not only to design solutions for inclusion, but also test for it.
- **3. Create Awareness in an Unaware Market**
Discover how startups tackle urgent but overlooked challenges, creating awareness and building industry buy-in to drive adoption and investment.
- **4. Make or break the Matchmaking**
Discover the challenge of aligning startup solutions with tourism industry needs, where adaptability and active listening can make or break a good match.

1. BUILDING FROM SCRATCH

From Scratch with Snotra

Snotra was born from the XNTC hackathon in Iceland, where the team came together around an idea for an AI-powered ESG reporting tool for tourism SMEs. Reaching the testing phase, Snotra faced a common challenge: How to engage users in tourism and hospitality when your product isn't fully functional?

While Snotra's MVP wasn't ready for direct testing, the team focused on understanding potential users' workflows, challenges, and how their tool could add value. Their solution? Develop a beta version and test the concept with hotels to explore its real-world potential.

Building from scratch meant letting go of perfection and focus on building alongside the industry, adapting to the industry's needs, and learning at every step.

3 Steps to Testing in Beta:

- 1. Build something:** The team created a beta version of their tool through iterative internal workshops, with guidance from mentors and experts.
- 2. Measure what's going on:** The team held demo sessions with hotels, showcasing the beta version, discussing functionality, and exploring potential applications.
- 3. Learn and adapt:** Feedback from demos led to product refinements, shifting focus from data collection to training and reporting tools that aligned better with user needs.





IN CONVERSATION WITH VICENTE CARRO, CO-FOUNDER OF SNOTRA

What's it like doing live demos?

The focus during demos isn't just showing the platform – we carefully demonstrate how and which specific features can help solve the industry's problems. For example, big companies may need auditing capabilities, whilst smaller ones might focus on simple compliance tools. We've been very attentive to this.

What do you do with feedback from demos and clients?

We evaluate feedback carefully to see if it aligns with our vision for Snotra. It's not about blindly implementing every suggestion but using it to refine hypotheses and iterate. It's a fast process – we make sure we don't fall in love with an idea. If something doesn't work, we pivot and focus on what does.

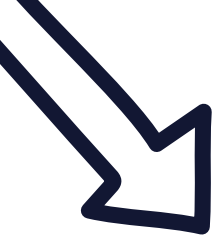
How do you decide when an idea is worth keeping?

As a developer, I can become very focused on creating an MVP and evolving it into the final product. I'm trying a new approach... Instead, constantly questioning if what you're building truly solves the customer's needs in a scalable way. Don't fall in love with your idea – trash it if necessary and rebuild until it's become more "right".

When we started, we assumed the main challenge would be solving compliance issues like data collection. Through industry interviews, we actually learnt that wasn't the case.

So how much has Snotra evolved from the initial idea you created at the hackathon, and what elements from that original version are still proving useful?

The core idea – helping tourism companies comply with sustainability requirements – has stayed consistent. But everything around it has shifted. When we started, we assumed the main challenge would be solving compliance issues like data collection. Through industry interviews, we actually learnt that wasn't the case. Most businesses weren't even aware of upcoming regulations or the problems they might face. Some went from complete ignorance to panic during those conversations!



What advice would you give to someone participating in a hackathon for the first time?

Show up. Just go. Even if you don't think you have anything to contribute, you never know what might happen. The first time I attended a hackathon, I simply showed up, and it turned out my knowledge aligned perfectly with the solution we developed. When I went to the XNTC hackathon I told my wife I wasn't sure why I was going!

What challenges have you faced in taking Snotra beyond the hackathon, and how are you navigating them?

To be honest, the biggest challenge has been balancing our work on Snotra with full-time jobs. Scheduling was tough and ultimately led to us scaling down from three team members to two.

What was it like coming together as "strangers" at a hackathon and immediately diving into an innovation process?

[Two of us] weren't total strangers when we met at the XNTC hackathon – we'd met at a previous hackathon. We did have another team member we met for the first time there, and I remember being cautious about potential team dynamics. We went ahead, but over time we couldn't align priorities, and that's when challenges started surfacing, and we decided to part ways with that team member.

What would be your advice for other startups coming from hackathons with these challenges?

If you're serious about pursuing a project like this, you have to accept there's little time off. It's a constant hustle, a weird balance between working to support your current life and building the thing that could become your future. Ideally, you'd have funding or a salary to focus entirely on the project, but most startups don't start there. You have to put in the work to reach that level of maturity. You need momentum. Regular meetings and consistent progress are crucial otherwise your project will lose steam and die.



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What has your experience been like working with the tourism industry?

Surprisingly positive. Everyone has been eager to talk with us, which isn't always the norm in startups. In Iceland especially, there's been a lot of openness, and bigger companies already recognize the need for sustainability compliance. The urgency for smaller businesses is harder to create – it needs to come from within the industry.

What's next for Snotra?

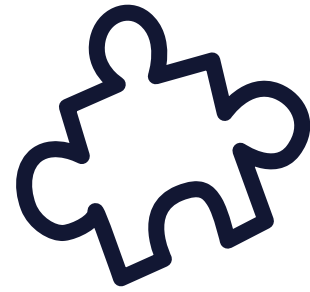
We're focused on scaling responsibly and preparing for legislative changes that's going to impact the tourism industry. We want to make sustainability compliance straightforward for businesses, whatever their size. We want Snotra to bridge the gap between regulations and businesses that are actually complying.

From Scratch: In summary

Snotra's journey highlights the reality that great ideas alone don't build successful startups – consistent guidance, industry connections, and iterative validation are just as crucial. The XNTC program provided Snotra with the scaffolding to navigate the challenging early stages, ensuring focus, accountability, and market alignment.

Sustained support, not just a single event, is what empowers ideas to transform into scalable businesses. The transition from hackathon to business requires more than enthusiasm. It demands structure, mentorship, and a network willing to test, challenge, and eventually embrace new solutions.





2. DESIGN FOR INCLUSION

Accessibility was identified in the XNTC problem phase as one of the Nordic tourism industry's pressing challenges. As the sector evolves, there's also growing recognition that inclusive design goes beyond physical accessibility to encompass a broader range of diverse needs. From sensory-friendly environments to tools that assist with cognitive challenges, creating inclusive tourism experiences is essential for ensuring no traveller feels left behind.

One area that has previously been overlooked is neurodivergence and designing for neuroinclusivity. Neurodivergent individuals — estimated to make up around 20% of the global population — frequently encounter barriers like sensory overload, rigid schedules, and difficulties in unpredictable environments. These challenges can turn everyday tourism experiences, such as attending professional and leisure events, or visiting museums, into overwhelming and stressful encounters.

Despite the Nordic region's reputation for equality and progressive values, its tourism sector doesn't consistently translate these principles into practice.

Universal Design: A Foundation for Inclusive Tourism Innovation

Universal design starts with diversity at its core, creating solutions that cater to the widest range of people—regardless of ability, background, or circumstance. It ensures accessibility isn't an after-thought but a guiding principle.

For the tourism industry, this approach is both logical and impactful. Designing services to accommodate everyone, including individuals with disabilities, families with young children, and the elderly, broadens potential visitor numbers and enhances overall satisfaction.

By embedding universal design into innovation processes and new solutions, Nordic tourism can expand its audience while strengthening its commitment to inclusivity and ensuring every visitor feels equally welcomed.





What Did Testing for Inclusion look like?

XNTC partnered with [Tiimo](#), a daily planning app designed for neurodivergent individuals. Together, XNTC and Tiimo set out to explore how such a tool as Tiimo could specifically support event attendees and business travelers in navigating and participating more effectively in professional events.

Research by [EventWell®](#) revealed that 85% of neurodivergent event attendees opt out of events due to fears of being triggered, overwhelmed, or unwell. This insight informed the core focus for testing: **How could Tiimo help event delegates attend, navigate, and fully engage in events?**

XNTC collaborated with TechBBQ as a testbed, a major tech and startup conference in Copenhagen. Attendees were invited to use Tiimo for scheduling and planning their participation, followed by post-event surveys to assess the app's impact. However, participation rates were lower than expected, and the test highlighted two key challenges:

1. **Visibility in a crowded environment:** TechBBQ is a large, fast-paced event where it's challenging to capture delegates' attention amidst a sea of competing digital tools and resources.
2. **Unfamiliarity with neuroinclusivity:** The terms "neuroinclusivity" and "neurodivergence" are still relatively new and perhaps not very familiar within the Nordics, which may have contributed to the limited interest in participating in the test.

In the end, the main focus of the test shifted to **awareness testing**. Tiimo was joined by two other neuroinclusive startups to present their work; [Nuance](#) and [Mental Assistant](#) alongside leading international examples and research insights:

- Alison Brooks, Vice President, Destination Experience & Advocacy with Visit Mesa in Arizona, shared their approach to destination development as the world's first autism-certified destination.
- Associate Professor Carina Lomberg from DTU Entrepreneurship presented research on neurodiversity in entrepreneurship.



IN CONVERSATION WITH TIIMO

Exploring neuroinclusivity, universal design and tourism with Tiimo co-founder and CEO, **Helene Lassen Nørlem**:

What is your perspective on the tourism market? Is it an area of interest for Tiimo?

Yes, of course. Tourism hasn't really focused on neurodiversity before. This mirrors a general societal trend: Only in the most recent years have people started becoming more aware of neurodiversity and how widespread it is. Neurodivergence is often an invisible disability, and it's not always clear what it is or how to best support or accommodate neurodivergent people. There's a lot of opportunity to do better.

How can the tourism industry do better and accommodate such diverse needs?

It depends a lot on what part of tourism you're working on, but the starting point is recognising that change is needed and taking action to explore what's possible. For instance, in the hotel industry, this could involve adding a question during booking to ask guests if they have specific needs. This first step is just literally about gaining an understanding of neurodivergence – what it means, the challenges people face and identifying opportunities to offer better support.

It's been proven that when you make changes for a specific group, you end up improving the experience for everyone. For example, in schools, designing classrooms and teaching methods to support neurodivergent children has been shown to benefit all students because of things like a more structured approach or calm lighting – this is better for all children. Universal design is a great example of how focusing on specific needs leads to broader benefits.

Have any travelers used your app?

A user once got in touch with us and shared that they were able to travel for the first time thanks to the app. They started by Googling pictures of all the places they planned to visit, then uploaded those images into Tiimo. From there, they broke their trip into small, manageable activities. For neurodivergent people, even if they've Googled images, it's hard to recall the photos later. By putting them in the app, they could use it as a preparation tool and a visual map of their day.

This traveler essentially structured their own experience with Tiimo. But it highlights how destinations or hotels could help by sharing clear, detailed photos of e.g. where to check in, who will greet them, and what to expect at each stage. Knowing what's coming is so important for neurodivergent people.

It's been proven that when you make changes for a specific group, you end up improving the experience for everyone.

What was it like testing Tiimo at TechBBQ?

Very few people signed up to test Tiimo at TechBBQ, but there's a learning there too. Maybe it's because TechBBQ is already an overwhelming event, with a lot happening. But TechBBQ also offers the Brella app for scheduling, which many attendees were already using alongside their personal calendars. In hindsight, it would have been better to integrate Tiimo with the tools already in use at TechBBQ.

So how would you integrate Tiimo with something like Brella?

Ideally it would actually work the other way around - Tiimo would import key information from Brella, but everything would stay within Tiimo. Users could mark what they wanted to do, and Tiimo would show them what to prioritise and how to structure their schedule. Of course, integrations like this are very technical and tricky to implement.

How do you make decisions about where to focus Tiimo's resources?

We always ask: Where can we help the most people? Where do we meet the most needs, right here and now? Right now, we're focusing on building the product for our end-users and strengthening the app that way. Integrating with other tools, like Brella, would only make sense if we were sure a lot of people would find value in it.

With a small team, it's tough to find the best way to test something new. There's always a tension between trying new things but against the worry that what if no one ends up using it? Our overall mission is to help as many people as possible, so we focus on reaching the most users.

At TechBBQ, the test was focused on the so-called MICE-segment (Meetings, Incentives, Conferences and Exhibitions). Why should this part of tourism take neurodiversity very seriously?

If MICE don't start to focus on how to accommodate neurodivergent people, they risk missing out on incredible talent. If you think about conferences and events - it is about collaboration, bringing people together to accomplish things. If these meeting spaces don't start to better accommodate neurodivergent individuals, they will continue to miss out on the contribution of brilliant minds.



Best Practice for Neuroinclusive Destinations

The growing global focus on neuroinclusivity marks a significant shift in how destinations and tourism businesses approach accessibility. According to a recent [BBC report](#), over 300 businesses and three destinations have earned Autism-Certified status. Leading this movement is [Visit Mesa](#), the world's first fully certified autism-friendly destination.

Visit Mesa's efforts were highlighted during the XNTC event at TechBBQ, showcasing how prioritizing neuroinclusivity is not only a moral responsibility but also a strategic opportunity to attract and welcome diverse travelers. Here are some key initiatives that have positioned Mesa as a leader in inclusive tourism:

- **Certified Sensory Guides:** Detailed sensory guides provide visitors with crucial information about sensory inputs at various attractions. These guides empower visitors to anticipate and manage sensory experiences, ensuring a more comfortable and enjoyable visit.
- **Autism GeoTour:** Partnering with Geocaching HQ, Visit Mesa launched the *Autism GeoTour (FT48C)*—a hide-and-seek travel quest that engages travelers on the autism spectrum. Using GPS devices or mobile apps, participants search for hidden geocaches designed with neurodivergent individuals in mind, offering a playful and interactive experience.
- **Community Training:** In collaboration with the City of Mesa and the Mesa Chamber of Commerce, Visit Mesa has spearheaded training programs for local businesses and civic organizations. These programs equip businesses—whether it's a coffee shop or an amusement park—with the tools to better accommodate neurodivergent travelers, creating a genuinely supportive environment.
- **Innovative Funding Initiatives:** Moving beyond traditional funding streams, Visit Mesa introduced *Spectrum*, an IPA beer, with a portion of proceeds allocated to the Mesa Regional Foundation for Accessibility, Diversity, and Inclusion. This creative approach not only raises funds but also promotes awareness of neuroinclusivity.

Visit Mesa's example demonstrates how destinations can turn inclusion into action, bridging moral imperatives with economic and strategic gains. By embracing innovative initiatives, they've positioned themselves as a global leader in inclusive tourism while paving the way for other destinations to follow.

Designing for Inclusion: In Summary

Testing with Tiimo as part of the XNTC revealed key takeaways for advancing inclusion in tourism innovation:

1. **Awareness Comes First:** Neuroinclusivity remains a new concept for many. Building awareness is crucial for driving engagement and adoption.
2. **Universal Design Works:** Inclusive solutions don't just benefit specific groups—they enhance the experience for all travelers.
3. **Tailor Your Testing:** Tests must align with user habits and environments to generate meaningful results.

For the Nordic tourism industry to lead, inclusion must move from aspiration to action, with universal design as a cornerstone of innovation.





3. CREATE AWARENESS IN AN UNAWARE MARKET

During the XNTC tests, the challenge wasn't just refining products – in some cases, it was convincing the tourism industry and businesses to act on challenges perceived as 'future challenges' – like requirements for sustainability reporting and protecting your business from a potential cybersecurity threat.

The approach in these cases was to make the risks tangible, highlight the benefits, and drive action now rather than later. Here is how this was approached as part of the XNTC testing:

Challenge 1: ***ESG Reporting – Coming to Your Destination Soon!***

Snotra, an AI-powered ESG reporting and training tool for tourism SMEs – also described above, faced a key obstacle: Timing. The legislative push driving adoption – Corporate Sustainability Reporting Directive (CSRD) – isn't fully enforceable until 2025/2026. For many tourism businesses, this made the problem feel more distant and less urgent.

How Snotra Approached This Challenge:

1. Highlighting Consequences:

Snotra didn't just explain their product; they made the risks of inaction clear. By drawing comparisons to GDPR compliance, they illustrated how CSRD is another non-negotiable regulation – and failing to act could result in hefty fines. Tangible examples helped shift sustainability reporting from a "nice-to-have" to a critical business need.

2. Framing it as an Opportunity:

Beyond compliance, Snotra positioned ESG reporting as a competitive advantage. By highlighting the growing demand for eco-conscious offerings and brands, they showed businesses how sustainability documentation could be leveraged as a marketing asset to attract eco-conscious travelers.





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Challenge 2: Cybersecurity – Solving an Invisible Threat

In tourism, personal data is everywhere — passport numbers, credit card details, itineraries — all of which make the industry a target for hackers and cybercriminals. Robust cybersecurity is essential for maintaining customer trust and complying with regulations like NIS2 and GDPR.

[Cybercue](#), offering a cybersecurity solution and working with the XNTC team to adapt and offer this solution to tourism businesses, encountered a different challenge: Communication. For many tourism businesses, cybersecurity felt intangible and abstract, overshadowed by more immediate operational concerns and misconceptions that cybersecurity threats are more relevant to bigger businesses.

How Cybercue Approached This Challenge:

1. Engaging the Industry:

Cybercue reached out to 60 businesses, engaging 20 in detailed discussions and onboarding 11 participants for live testing. By involving a diverse range of tourism stakeholders — hotels, attractions, and experience providers — they ensured broad applicability of their solution.

2. Testing in Real-World Scenarios:

Participants actively used the cybersecurity solution in their operations for two months, allowing Cybercue to demonstrate its tangible benefits in real-world contexts.

3. Feedback Loops for Validation:

Cybercue conducted midway and concluding interviews to gather qualitative insights. These sessions revealed both usability challenges and opportunities for refinement, ensuring the solution aligned with industry needs.





IN CONVERSATION WITH CYBERCUE

Exploring awareness testing and how to bring invisible threats and needs to the forefront with CEO & Founder of Cybercue, Eskil Sørensen:

What inspired you to work with cybersecurity, why is it important?

We have been frustrated by how often cybersecurity solutions failed to make a measurable impact, especially for smaller businesses. The problem was clear: communication around cybersecurity wasn't personal enough. Generic warnings or blanket advice leaves SMEs disengaged, thinking, "this doesn't apply to me".

So, we took a different approach. We built a tool that allows businesses to describe their specific setup – specifying for example, their IT systems. From there, Cybercue sends highly individualised cues and notifications, tailored to their exact situation. We make these communications feel personal, because we think that will trigger SMEs to take more action.

How has the tourism market responded to your product?

Initially, it was tough. Many tourism SMEs view cybersecurity as something for larger companies or high-risk industries. A common mindset was "Why would anyone target us? We're just a small hotel or tour operator." This perception created a barrier not just for Cybercue but for cybersecurity providers in general.

We approached tourism organisations not as a sector, but as SMEs with unique challenges. Tourism businesses juggle seasonality, high turnover of staff, and scaling operations quickly when demand spikes – all factors that amplify cyber risks. Our focus was on connecting these realities with the need for good cybersecurity behaviours early on, so as they scale, they're doing it securely.

The tourism industry proved to be a great, and extreme place for testing. It's not bogged down by heavy compliance, which gave us room to try out new approaches, but it is also incredibly challenging as it is an industry which deals primarily with immediate business concerns, so finding ways to make cybersecurity feel accessible and worth their time was critical.

Understand the language of the industry. Tourism is about experiences, storytelling, and human connections. If you frame your product in technical or compliance-driven terms, you'll lose their attention.

What did you learn from testing Cybercue with XNTC?

We onboarded about 10-12 organisations and found challenges in maintaining engagement beyond onboarding. The platform sends notifications to prompt users when action is needed. These notifications often went unaddressed – not because they weren't valuable, but because the urgency felt overwhelming.

We found that if they didn't act immediately, they lost momentum. This insight has been invaluable in rethinking how we design for and communicate with time-strapped users.

What strategies have you found effective in turning 'unknown needs' into recognised priorities?

Weirdly, it's not necessarily hammering on about the urgency around not taking cybersecurity seriously, which has been our main lever for grabbing attention. Pushing the "cyber threats are imminent" narrative only created stress or led to disengagement. Tourism SMEs already have enough urgent matters to deal with.

Instead, we shifted to a more empathetic approach: We know you're busy. When you're ready to focus on cybersecurity, here's how we'll help you make the most of that time.

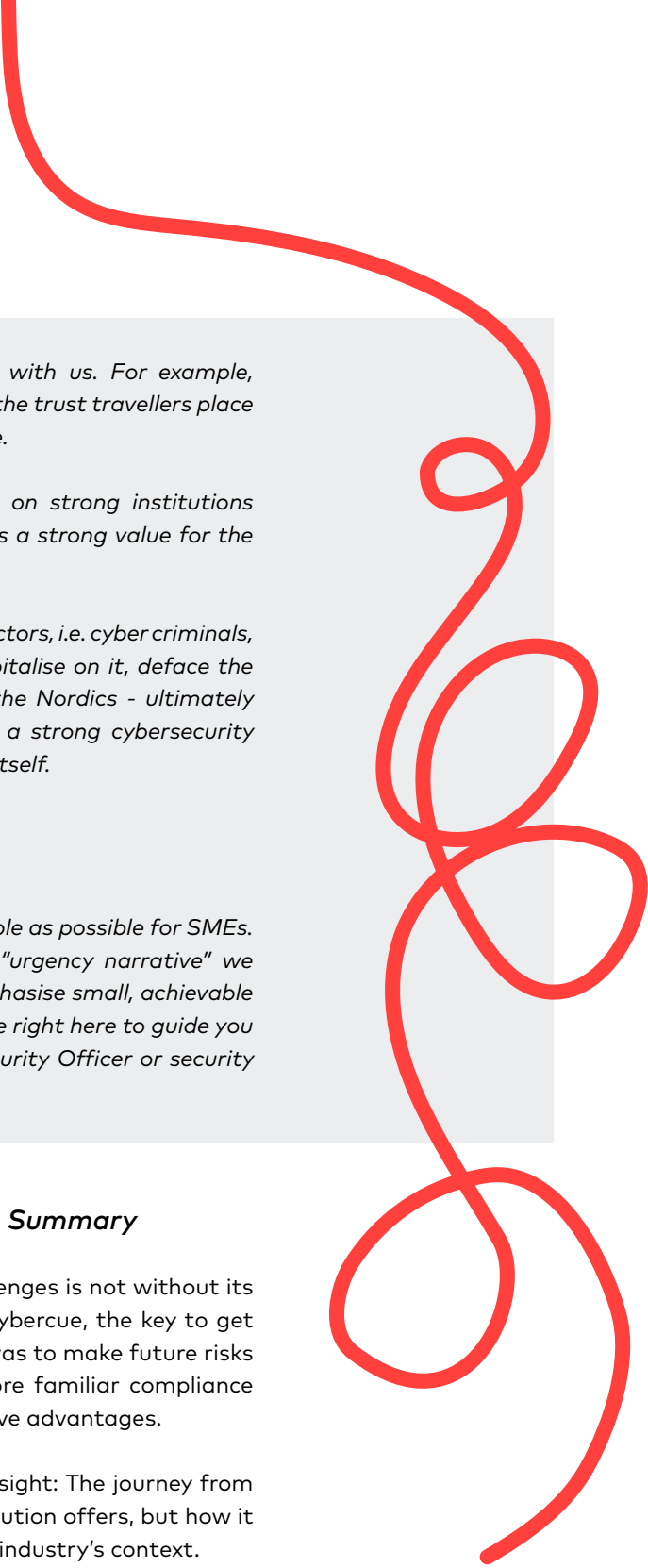
Our focus is now on creating a safe space for businesses to engage – not based on a fear of falling behind. For instance, one common question we received was: How much time do I have to spend on this?

Our answer became a key part of our pitch: Set aside an hour a month, and we'll make that hour as valuable as possible.

We want to improve how we frame the narrative: Move beyond cybersecurity being synonymous as avoiding disaster; but about creating trust and stability for your business and your customers.

What advice do you have for startups working with the tourism industry?

Understand the language of the industry. Tourism is about experiences, storytelling, and human connections. If you frame your product in technical or compliance-driven terms, you'll lose their attention. Instead, tie your solution



to the human experience, that's what we're taking with us. For example, cybersecurity isn't just about IT – it's about protecting the trust travellers place in a business to keep their data and experiences secure.

Nordic countries are safe travel destinations based on strong institutions and culture. Inhabitants have trust within another. It's a strong value for the countries and a strength for the tourism industry.

However, this is also a weakness because cyber threat actors, i.e. cyber criminals, take advantage of this trust. Cyber criminals can capitalise on it, deface the industry and break down a part of the economy in the Nordics - ultimately challenging the value of the Nordics itself. Creating a strong cybersecurity culture in a single tourism SME supports the industry itself.

What's next for Cybercue?

We're focusing on making cybersecurity as approachable as possible for SMEs. Like I said before, this means moving beyond that "urgency narrative" we used to grab and maintain attention, but instead emphasise small, achievable steps like dedicate an hour to this platform and we'll be right here to guide you through it all. Like a part-time Chief Information Security Officer or security consultant would do.

Create Awareness in An Unaware Market: In Summary

Testing solutions that address perceived future challenges is not without its own challenges. As XNTC tested with Snotra and Cybercue, the key to get tourism industry onboard with these new solutions was to make future risks both tangible and immediate, draw parallels to more familiar compliance issues and reframe solutions as potentially competitive advantages.

This part of the XNTC process highlights a critical insight: The journey from awareness to adoption is not just about what the solution offers, but how it is communicated and understood within the tourism industry's context.



Startup:
Is your target market not resonating with your product?

Ask yourself:

- Is my solution genuinely solving an industry challenge, or does the industry need better awareness of the problem and solution?
- How can I clearly demonstrate the urgency of adopting my product, even if the problem feels distant to them?
- What three simple, compelling messages can I use to shift their perspective and highlight the value of my solution?
- Am I positioning my product as essential for solving a pressing problem, or does it come across as a "nice-to-have"?
- Have I made the risks of inaction tangible and immediate for them?
- How can I frame my solution as an opportunity for growth or competitive advantage, rather than just compliance?
- Am I using data effectively to demonstrate the value and impact of my solution? Have I collected relevant data to validate its relevance and address industry concerns?

Tourism Professional:
Not sure how relevant a new solution is for your business?

Ask yourself:

- Is this solution irrelevant to my business, or am I overlooking its potential relevance?
- What's holding me back from seeing the value this solution could bring to my business?
- Have I fully considered the long-term risks of inaction, like falling behind competitors or missing upcoming legislative requirements?
- Are we effectively communicating our real challenges and pain points to solution providers?
- How can we test and validate this solution in a way that fits our operations and helps us understand its potential impact?
- Have we reviewed data or evidence provided by the solution provider to assess its effectiveness? How can we leverage data to make an informed decision?



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Magic

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Happy

TRUST

Fountain



4. MAKE OR BREAK THE MATCHMAKING

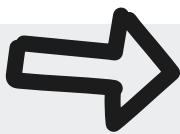
When startups and industry players come together, the process can be undeniably exciting. Yet, it's also complex and full of challenges that often surface as the collaboration unfolds, and both sides need to navigate the nuances of their respective needs, priorities, and ways of working.

As part of the XNTC process, the startup company [All Gravy](#) was introduced and matched with the tour company [Stromma](#). All Gravy is an AI-powered employee app with onboarding, while Stromma is a tour company that offers sightseeing and activities in 17 destinations.

The XNTC challenge at hand: Tourism employee attraction, retention and engagement. And All Gravy has shown great results in exactly retention and engagement in a parallel industry, namely retail, with adaptive payroll systems, matching younger generations workplace expectations and flexible demands.

While initially deemed a match made in heaven, the collaboration took time to unfold. And All Gravy approached the match with an open mind – listening, adapting and actively engaging with the needs of Stromma as industry representative.

In the following interviews on lessons learned, you will get the perspective of both sides: From All Gravy and from Stromma. Read it in combination and you will take away key insights on what it takes to match new solutions and innovations with the tourism industry.



IN CONVERSATION WITH ALL GRAVY

Unpacking the challenges and opportunities of adapting innovative employee tools for Nordic tourism with Lukas Kjelstrup, Go To Market Lead with All Gravy.

Firstly, why does All Gravy exist?

The workforce is changing and it's also in a bit of a crisis: shrinking attraction and retention of employees in the tourism industry, coupled with Gen Z employees, accustomed to platforms like TikTok, find traditional workplace tools out of sync with their expectations. The "aha moment" in our product was seeing employee adoption directly drive retention. With turnover rates as high as 80% in industries like hospitality, our platform has reduced churn by 20%, saving businesses money while creating better every-day work environments.

The frustrating thing is that once one provider starts offering financial wellness tools, employees will begin to expect it – just like the shift in consumer expectations after the rise in 'on-demand' platforms like Netflix, Uber, Spotify etc. The Nordics risk falling behind in attracting and retaining talent and may find themselves unable to compete in a changing workforce landscape

From hospitality to tourism – why did you make the leap?

Transitioning to tourism was natural for us, given the overlap in employee demographics across hospitality, retail, and amusement parks etc. Our company mission has always been the same: to build tools for employees, regardless of the industry.

How has your experience been working in the market of Nordic tourism?

Initially, we pitched to Stromma on financial wellness which basically means allowing employees to access wages before payday, as well as providing incentives to take shifts. While this concept resonated and has gained momentum in other countries, the Nordics aren't convinced. The frustrating thing is that once one provider starts offering financial wellness tools, employees will begin to expect it – just like the shift in consumer expectations after the rise in 'on-demand' platforms like Netflix, Uber, Spotify etc. The Nordics risk falling behind in attracting and retaining talent and may find themselves unable to compete in a changing workforce landscape.

How did you make your product relevant for Stromma?

Stromma wanted more than a niche solution, which they found financial wellness to be – they wanted an all-in-one app for pay, onboarding and training staff. We listened to this, and actually adapted our product to integrate the features they needed. After this, Stromma were a lot less sceptical and saw a far higher use case once we tweaked the platform to streamline HR processes – which was their pain point.

Where are you now after adapting to the market, and is there anything you would do differently?

Unfortunately, our journey with Stromma didn't take off, but our advice for other startups hoping to collaborate with big partners would be to actually pay attention to the client's internal processes, not just your own. This means understanding for example, who needs to be involved in the decision-making (e.g., legal, finance, HR, operations)? What internal steps are they subject to before being able to enter an agreement? These kinds of considerations can avoid delays or mismatches like we experienced.



IN CONVERSATION WITH STROMMA

Exploring the balance between innovation and operational readiness with Berit Jebjerg, HR Manager from Stromma, in reflection on their collaboration with All Gravy and the potential of working with startups in tourism:

What were your first impressions of All Gravy?

Initially they first approached us with an app for employee pay, and it wasn't exactly what we were looking for. But we were impressed by their vision – like showing employees how extra shifts could translate into personal goals, and their previous clients, like 7/11. Personally, I admired their innovative ideas, but it wasn't a priority for us.

When we actually got speaking to them, we realised they offered much more than just an employee pay benefits solution. Their learning platform stood out, particularly their forward-thinking approach to using AI to create more personalised and meaningful interactions with staff during onboarding. We liked this and decided to keep the talks going with them.

Speaking of what you like, what qualities in startups impress you as a potential investor?

It's important startups take time to understand our needs – genuinely listen to our specific challenges. All Gravy had a really good approach here – as when we let them know we didn't see payroll as a core need for us right now – they came back with a more relevant solution surrounding e-learning and onboarding for new staff! I really value entrepreneurs who are adaptable and open to testing new ideas, not just selling pre-packaged solutions.

Why didn't you proceed with All Gravy?

There were a few challenges. Their system didn't support Dutch or Finnish, which are key languages for us. Also, their e-learning software, as it is right now, integrates with Microsoft 365, unlike the platform we ultimately chose. For instance, our current solution allows single sign-on and links education directly to our intranet – and this is really essential for us. All Gravy were innovative and adaptable, but we needed something more immediately aligned with our operational needs.

It sounds like there was a balance between innovation and readiness. How did you navigate that?

Absolutely. Choosing between innovation and operational readiness was challenging, especially with the financial pressures the industry still faces post-COVID. If the pandemic hadn't happened, we might have gone with All Gravy. Their ideas were forward-thinking, but we still need to prioritise immediate operational challenges.

I really value entrepreneurs who are adaptable and open to testing new ideas, not just selling pre-packaged solutions.

Did All Gravy's approach have any lasting impact on Stromma?

Yes, even though we didn't proceed with them, they sparked an internal evaluation process. They inspired us to rethink our tender and procurement processes with more innovative approaches. It was after meeting them we put out a tender for the onboarding and e-learning of staff.

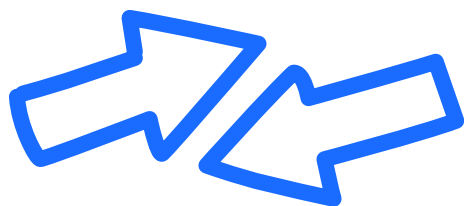
We also want to stay in touch with All Gravy. Supporting startups is actually part of our long-term strategy, as we see it as an opportunity to get new perspectives, create mutual value, and also as a responsibility for more established organisations to give young entrepreneurs support and a platform where they may test their ideas.

Make or Break the Matchmaking: In Summary

Collaboration between startups and established tourism businesses can drive significant innovation but requires careful alignment of priorities and expectations. Successful partnerships depend on clear communication, mutual understanding, and a willingness to adapt both products and processes to meet specific needs.

Challenges such as integration with existing systems, operational readiness, and varying priorities can create hurdles, but they also present opportunities for both sides to grow and refine their approaches.

Ultimately, effective matchmaking between startups and the tourism industry hinges on finding the balance between forward-thinking innovation and immediate operational needs.



It's a match!

In terms of workforce retention and engagement, one XNTC match was made: **Cappy**, founded with a mission to empower employees with greater financial flexibility, made a successful test match with **SkiStar**, Sweden's largest ski resort company, which operates in both Sweden and Norway.

The test is in process at the time of writing this Guidebook and will involve 200 SkiStar employees, as part of the company's broader commitment to innovation and being an attractive employer. With over 2,000 employees during the high season, SkiStar is focused on engaging young talent and strengthening their employer brand.

Cappy highlights the broader value of their platform: *"Financial stress often impacts workplace performance. The majority of our users report using Cappy to gain a clearer overview of their earnings, which leads to greater financial security and better control over personal finances. Additionally, this real-time pay access reduces impulsive spending, helping users make smarter financial choices."*

Throughout the test, Cappy will track key metrics, ensuring both companies can refine their strategies.



SO, WHAT DID WE LEARN FROM TESTING SOLUTIONS?

1. Action Over Perfection

Testing doesn't require a polished product. Snotra's journey demonstrated the value of launching with a beta version, engaging users in demo sessions, and learning from feedback. Progress comes from action, even when the tool isn't perfect.

2. Inclusivity as a Strategic Advantage

Designing for neurodivergent travelers doesn't just cater to a select few—it improves experiences for everyone. Inclusivity isn't just good ethics; it's good business.

3. Speak the Industry's Language

For solutions to resonate, they need to align with industry realities. Startups like Snotra and Cybercue succeeded by framing their tools — ESG reporting and cybersecurity — as essential solutions, translating complex features into practical, tangible benefits.

4. Turn Invisible Needs into Opportunities

Cybercue reframed cybersecurity from "disaster prevention" to "trust-building," transforming an abstract and overwhelming issue into an actionable opportunity. Tourism startups can take a similar approach by connecting big-picture challenges to immediate, relatable benefits.

5. Collaborate, Don't Dictate

Startups thrive when they listen, adapt, and align with the industry's pain points rather than insisting on rigid solutions. In a sector operating on thin margins, collaboration and flexibility are essential for building lasting partnerships.

6. Cross-Nordic Testing for Cross-Nordic Markets

Many of the startups are interested in testing in a neighboring Nordic market, and the industry is similarly open to welcoming Nordic solutions. Scaling across the Nordics is more like extending a home market than breaking into a foreign one, hence also a good testing ground for early scaling.



CHAPTER 6: INNOVATION TO BE CONTINUED



A Guidebook that never ends



Tourism innovation doesn't conclude with a hackathon, a testbed, or even the launch of a promising new product. It's an ongoing process of iteration, adaptation, and discovery. It's a journey, not a destination.

This Guidebook offers a snapshot of that journey, filled with learnings, strategies, and stories from the X-Nordic Travel Contest programme. But, as with innovation itself, there is no big conclusion to this final chapter, much like there is no big final revelation of the XNTC programme. Rather than uncovering one miraculous golden egg, a singular, game-changing idea, this programme has planted a field of potentially golden seeds. These seeds — ideas, partnerships, insights, reflections — are scattered across the Nordic tourism landscape, each with the potential to grow into something transformative in its own time.



Innovation doesn't always come with a "eureka" moment. Its value often lies in the groundwork: asking the right and wrong questions, exploring uncharted territory, and building the tools and relationships that make long-term change possible.

As the tourism industry, and everything around it, evolves, driven amongst others by sustainability demands, workforce challenges, new technologies, digital transformation, and inclusivity, the future will require not just creativity but persistence. The key to staying ahead is to keep staying ahead: testing boundaries, rethinking assumptions, allowing for failed attempts and trying again.

The XNTC experience reminds us that innovation isn't about perfection, it's about progress.



KEY TAKEAWAYS FROM THE X-NORDIC TRAVEL CONTEST GUIDEBOOK

1. Innovation as an Iterative Process:

- Innovation is messy, non-linear, and requires persistence rather than expecting immediate breakthroughs.
- Successful innovation stems from testing, feedback, and refinement rather than chasing perfection from the start.

2. Identifying the Right Problems:

- Solving meaningful problems is more critical than jumping to solutions.
- Spend time reframing and challenging assumptions to uncover better or future-relevant challenges.

3. Collaboration Drives Impact:

- Cross-sector and cross-border partnerships enhance innovation and scalability.
- Structured matchmaking between startups, DMOs, and industry players is essential for impactful collaboration.

4. Hackathons as Catalysts:

- While hackathons generate energy and creativity, their success often depends on clear goals, diverse participation, and post-event follow-up to nurture ideas into actionable solutions.

5. The Power of Testing:

- Real-world testing bridges the gap between ideas and viable solutions.
- Tailoring tests to specific markets or industries strengthens relevance and actionable results.
- Testing doesn't need a polished product; early prototypes or MVPs can reveal valuable insights.

6. Inclusivity as a Strategic Priority:

- Designing for inclusivity benefits all users and creates broader market opportunities. Universal design principles should guide innovation in tourism.

7. Startup and Industry Matchmaking:

- Aligning startups' solutions with industry needs requires active listening and adaptation on both parts
- Success often depends on balancing immediate operational priorities with long-term innovation goals.

8. Awareness as a Key Driver:

- Building industry awareness about future challenges (e.g., sustainability reporting, cybersecurity) is as critical as creating solutions.
- Framing solutions as opportunities rather than compliance requirements can drive greater adoption.

9. Nordics as a Launchpad:

- The Nordic region offers a strong launchpad for startups to test and scale solutions, leveraging shared values and trust.

10. DMOs as Innovation Catalysts:

- DMOs can play a pivotal role in fostering innovation by acting as connectors between startups, industry, and local insights.
- There is significant untapped potential for Nordic DMOs to drive structured and strategic innovation efforts – in cross-border collaboration.



CULTIVATING NORDIC TOURISM INNOVATION FOR SUSTAINABLE GROWTH

The XNTC programme has showcased the potential for innovation in the Nordic tourism sector, while also highlighting critical gaps that need to be addressed for startups and industry players to thrive in the Nordics as a region.

Across hackathons, mapping, and testing, one lesson has stood out: Tourism innovation is not a single event or a solitary breakthrough — it's a process that demands collaboration, persistence, and support. And a lot of trial and error.

From startups tackling sustainability reporting and cybersecurity to initiatives advancing inclusivity and workforce engagement, the programme revealed a lot of creativity and ingenuity. Yet, it also exposed the fragmented nature of the tourism startup ecosystem, where resources, connections, and clear pathways for scaling – even within the Nordic region - remain elusive.

To move forward, the following questions should be addressed:

- **How can we bridge resource gaps?** Whether it's access to venture capital, advisory services, or testing environments, startups need targeted support to accelerate growth and impact. And the Nordics could potentially serve as a great launchpad before venturing into more international markets.
- **How can partnerships be deepened?** Structured and systematic matchmaking between startups, established industry players, and DMOs can unlock untapped opportunities for collaboration and innovation. But it requires time, resources and deep knowledge of all sides of the equation to make for win-win matches.
- **What role can DMOs play in fostering innovation?** With their extensive networks and local insights, DMOs are uniquely positioned to act as catalysts for innovation, yet these partnerships need more structure and intent to move beyond ad hoc collaboration. And there is a big untapped cross-border collaboration potential that is mostly left unexplored.
- **How can we prioritise experimentation?** Targeted funding for experimental projects and cross-sector partnerships can transform ideas into actionable solutions that address both local and cross-border challenges.

The sustainable and competitive future of Nordic tourism depends on nurturing innovative seeds with a clear, strategic focus that fosters collaboration, experimentation, and new thinking.

As this guidebook demonstrates, the value of a programme like XNTC isn't in finding a single "golden egg" solution. It's in creating a foundation for continuous learning, enabling startups and industry players alike to embrace challenges and work together toward a more sustainable and resilient tourism sector.



Thank you for reading.

Now it's your turn:
The real value of this Guidebook is what you do next!

