

MONITORING THE  
**Sustainability  
of Tourism**  
IN THE NORDICS

 Nordic Council  
of Ministers



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Photo: Martin Heiberg, VisitDenmark. Rooftop garden at the restaurant Gro Spiseri in Copenhagen

## Executive Summary

This report is a product of the collaboration of all the Nordic countries in the project **Monitoring the Sustainability of Tourism in the Nordics**. The project was funded by the Nordic Council of Ministers in order to explore and develop further collaboration within sustainability and regeneration in Nordic tourism.

All the Nordic countries are committed to sustainable development at the highest governmental level. All are committed to the Paris Agreement from 2015, and all have incorporated the UN Sustainable Development Goals, Agenda 2030 into national policy objectives. Sustainability, social cohesion, green growth and measures to combat climate change are fundamental pillars in Nordic co-operation and the Nordic Council's Vision 2030. The Nordic Business Ministers' Plan for Nordic Tourism Co-Operation 2019–2023<sup>1</sup>, where sustainability is an important theme, is a further point of departure for this project.

As the impact of tourism and travel has been growing globally and regionally, the forces at play in and around the industry have become more evident and contested. Before the global COVID-19 pandemic forced a lockdown on the industry in the beginning of 2020, tourism was one of the fastest growing industries in the world economy, with an important contribution to job creation, export revenue and domestic value added. Governments and industry alike had come to regard tourism as an important driver of economic growth and development. The global impact of tourism and the extent of its infiltration into local communities and natural and cultural environments makes the sector an important driver for change. This represents enormous opportunities and challenges at the same time. Many of these challenges are part of a global category of "wicked problems", i.e., challenges that are difficult to solve due to complex and often contradictory causes. These include overtourism, sustainability in the global and local context, seasonality and social challenges, fragile destination development, lack of agility and competence and the need for developing new and more valuable business models.

The lockdown of the industry due to the COVID-19 pandemic has caused immense economic hardship. While the pandemic has eroded infrastructures and innovative capacities, it has also made the need for new

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1. Nordic Council of Ministers (2019). Plan for Nordic Tourism Co-operation 2019–2023.

approaches and innovation even more pressing than before the crisis. Significant effort is needed to resurrect economic growth after this unprecedented blow to the industry. During this period of crisis, questions have been asked regarding where the industry should go from now and what will be the important decisions for recovery and regeneration. Early in the pandemic, the phrase, "build back better" was coined in the hope that the enforced shutting down of "business as usual" would encourage rethinking, reassessment and an opportunity to do better when it was all over.

This report is an exploration of the status of Nordic policies and practice with regard to monitoring the environmental, social and economic impact of tourism. The objective of the report is to bring forward methods, expertise and best practices that already exist in the Nordic countries and to create a venue for the exchange of ideas and experience of top experts in the field from all the countries. The report makes observations and recommendations on how, through closer co-operation, the Nordic countries can indeed "build back better" to create more sustainable and regenerative travel and tourism industries.

The findings and recommendations made in this report are the result of a strategic effort to map, analyse, initiate dialogue and review best practices, policies and methods on Monitoring the Sustainability of Tourism in the Nordics. The project benefitted greatly from the participation, dialogue and contributions of a large group of Nordic and international experts who took part in digital workshops, meetings and other platforms created by this project. In the chapters that follow, these findings are explored in more depth, followed by recommendations aimed improving policies and practices for sustainability and regenerative tourism.

## Key Findings

- Sustainability is **top of the agenda** in all Nordic countries, but the countries **differ a great deal** in their understanding, ambition, approach and scale of implementation of sustainability measures within the tourism industry across the region.
- The Nordic Council of Ministers' Vision 2030 provides a **strong shared vision** for making the Nordics the most sustainable and integrated region in the world. To realise that shared vision, there is a need for an **integrated, holistic strategy approach** to sustainability in tourism. Some Nordic countries have issued new tourism strategies, while others have new strategies coming out in 2021, where sustainability is increasingly an overarching strategic priority.
- The Nordic countries share an understanding of sustainability as encompassing the **environmental, social and economic** spheres, rather than just environmental.

- **Opportunities are being lost** because of **lack of Nordic collaboration**, knowledge exchange and shared practices.
- **The true Nordic potential** lies in much **stronger and closer collaboration** on shared challenges which cannot be solved by one organisation or one country on its own.
- Sustainability in tourism is a **highly complex and dynamic** area, and metrics and methods **must continuously reflect these changes to be meaningful**. The questions of what we are measuring and why we are measuring must continuously be under review.
- The vision for sustainability and regeneration in Nordic tourism must be realised through collaborating on and **sharing meaningful metrics** to measure our progress towards it.
- There is a shared understanding that in developing metrics and benchmarks, the ambition must be on working towards **regenerative tourism development** in the Nordics, although the short-term ambition may be on reaching more immediate sustainability objectives.
- There is a call for a more **value-based approach** in relation to destination development and the **responsibility of destination marketers**. The baseline must be a commitment to ensure that tourism **adds value to local communities** and the people who live there.
- There is a strong need for **economic growth in the post-COVID-19 visitor economy**, and indeed, strong growth is expected. Growing awareness of the negative impact of tourism, as well as an **awareness of the urgency** with which **climate change** needs to be addressed means that **public and private organisations** in the tourism sector must take **responsibility**.
- **Post-COVID-19 recovery** efforts may not be a setback for sustainability. Despite fears that the pandemic may lead to a rush to get “back to business” with little regard for sustainable practices, all Nordic countries report **continued priority of sustainability** in tourism development as part of the pandemic recovery plans and strategies.

# Recommendations

The recommendations made in this report are a product of mapping and analysis carried out in the project and should be regarded as suggestions for actual projects that will lead to stronger Nordic co-operation and more effective policy development and initiatives that will contribute to a more sustainable and regenerative tourism industry in the Nordics.

1. Stronger Nordic Collaboration
2. Regenerative Tourism: A shared responsibility
3. A Nordic Network for sustainable and regenerative tourism
4. A Meaningful Metrics Monitor
5. Platform for sharing Best Practices
6. New disruptive technologies and business models for sustainability



Photo: VisitIsland

## Background to the Project

Sustainability in travel and tourism is on top of the political agenda in all Nordic countries. The countries share an understanding of the importance of monitoring sustainability in tourism and have led the way globally in developing and implementing approaches to sustainability. Many Nordic destinations have experience, data, capability, recognition and brand value as sustainable destinations. All Nordic countries use the UNWTO definition of sustainable tourism. Yet the understanding, ambition and approach to sustainability varies substantially across Nordic countries and destinations. Often, it has been a struggle to identify meaningful metrics to monitor sustainability, and a clearer definition is needed of what it is we are monitoring and why we are monitoring it. Nonetheless, the Nordic countries look to each other for inspiration and collaboration when it comes to best practices in improving sustainability in travel and tourism.

Sustainability is a central issue in Nordic tourism as well as in almost all national tourism policies in the Nordic countries and is a topic which has a variety of implications for the industry. The economic importance of tourism among the Nordic countries is significant and growing, with an important contribution to job creation, export revenue and domestic value added. Governments and public and private organisations alike have come to see tourism as a driver of economic growth and future development.

The interaction of the global impact of tourism and the extent of its infiltration into local communities and natural and cultural environments makes the sector an important driver for change. This represents enormous opportunities and challenges at the same time. The tourism sector has great potential for creating economic growth and development while at the same time posing real challenges to communities, culture and the environment.

The carbon footprint of global tourism is a major concern which cannot be sidelined. As global tourism grows, the carbon footprint of the industry has also grown rapidly. The increase has exceeded estimations and accounted for about 8% of global greenhouse emissions in 2013, four times more than previously estimated.<sup>2</sup> The World Tourism Organisation's estimate of carbon emissions from tourism is rather lower, or 5% of global emissions. Significantly, a massive 75% of that share originates from the transport sector, primarily aviation.<sup>3</sup>

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2. Lenzen, M., Sun, Y.Y., Faturay, F., Ting Y.P., Geschke, A., Malik A. (2018). The Carbon Footprint of Global Tourism. *Nature Climate Change*. Volume 8, 522–528.

3. World Tourism Organisation. (2018). FAQ – *Climate Change and Tourism*: <http://sdt.unwto.org/content/faq-climate-change-and-tourism>.

Environmental integrity and natural environments are increasingly seen as assets for the attractiveness of destinations, regional branding and the overall economic viability of communities and regions<sup>4</sup>. There is an obvious relationship between the value of the resource and its preservation and sustainability. This corresponds with the shared understanding that the Nordics should aspire to direct their marketing to selected "high yield – low impact" groups and avoid overcrowding and mass tourism. All the Nordics share a position as a destination for unspoilt nature experiences. All the Nordics have also to some extent experienced overtourism, environmental damage and strain on public services and infrastructure.

There is growing awareness of the fragile relationship between tourism and sustainability among the general public as well as in the political sphere. Consumers are increasingly concerned about climate issues and seeking journeys with less emissions and less negative implications for the local communities. Growing public concerns about the environmental impact of ever-increasing air travel, cars, trains and cruise ships may become the cause of the next disruptive shift in innovation and technology. What is certain is that environmental threats are real, and that travel and tourism industries will have to adapt to disruptive changes.

There is much uncertainty regarding how tourism will change post-COVID-19. There is speculation about how tourism behaviour may change; how market decisions, products and service delivery, security, travel distances and destinations may change. What is certain is that the travel and tourism industries will have to adapt to even more disruptive changes than ever before. Those changes will demand new business models and new competences. These pressures are on the increase, and politicians, policymakers and the tourism industry must be prepared to answer decisively and proactively.

There is already an array of best practice examples; projects, programmes and solutions being developed and implemented in all Nordic countries with the aim of working towards environmental, social and economic sustainability within Nordic tourism<sup>5</sup>. However, despite the importance placed on sustainability on both the national and Nordic levels, and despite many initiatives and national policies that have the objective of working towards sustainability, there is a lack of co-ordination, and objectives are unclear and monitoring tools not often in place<sup>6</sup>. Despite being such a widely used and critical term, "sustainability" is a surprisingly abstract concept and may have different meanings according to the context, disciplines or people using it. For "sustainability" to be a more useful tool to make changes and reach targets, it must be linked more directly to specific parameters, challenges, tasks and solutions.

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4. Øian, H., Fredman, P., Sandell, K., Sæþórsdóttir, A.D., Tyrväinen, L., and Søndergaard Jensen, F. (2018). *Tourism, nature and sustainability. A review of Policy Instruments in the Nordic countries*. Nordic Council of Ministers. TemaNord 2018:534.
  5. Hillgrén, A., Bröckl, M., Descombes, L., Kontiokari, V., and Halonen, M. (2018). *Nordic Best Practices. Relevant for UNEP 10YFP on Sustainable Tourism and Consumer Information*. TemaNord 2016:546.
  6. Bauer, B., Watson, D., Gylling, A.C. (2018). *Sustainable Consumption and Production. An analysis of Nordic progress towards SDG12 and the way ahead*. Nordic Council of Ministers.



Photo: Unsplash.com. Sailboat on East Greenland's fjords

## Key Activities and Methods

The objective of this project is to bring forward methods, expertise and best practices that already exist in the Nordic countries and to create a venue for the exchange of ideas and experience of top experts in the field from all the countries. It is not an objective of this project to produce a unified methodology, but rather to share knowledge and tools and to make methods that have proven results available to all Nordic countries.

In this manner, the ambition of the project is to increase the impact of effective practices and to speed the development and implementation of effective tools to monitor the impact of tourism in the Nordic region. This in turn will benefit tourism development and destination management in all Nordic countries. Important aims of the project are to strengthen Nordic cooperation; to identify common focus areas and to contribute to more effective Nordic policy development. It is also an ambition of this project to compare and share methodology, know-how and tools to identify indicators to evaluate the impact of tourism on national and local environments and communities.

While the issues and policies which provide the background to the project remain in place, a fundamental shift took place during the project time, following the onset of the COVID-19 crisis in early 2020. The crisis disrupted the premises on which some of the key assumptions of the project are based and called for reorientation of activities and goals.

Initial tasks involved mapping and outlining key national policies, projects, expertise and practices in the Nordic region and facilitating structured discussions among the partners in order to probe for key themes and concerns likely to move the analysis and idea development further.

### The project group included experts from all the Nordic countries:

<b>Denmark</b>	Eva Thybo	Visit Denmark
<b>Faroe Islands</b>	Alda Egilstrøð Magnussen	Visit Faroe Islands
<b>Finland</b>	Hanna Muoniovaara	Visit Finland / Business Finland
<b>Greenland</b>	Idrissia E.Y. Thestrup	Visit Greenland
<b>Iceland</b>	Berglind Hallgrímsdóttir	Innovation Centre Iceland
	Sunna Þórðardóttir	Icelandic Ministry of Industries and Innovation
<b>Norway</b>	Bjørn Krag Ingul	Innovation Norway
	Ingunn Sørnes	
<b>Sweden</b>	Christina Rådelius	Swedish Agency for Economic and Regional Growth

The Danish think tank Group NAO was recruited in a consulting and facilitating capacity to the project. Group NAO facilitated one workshop for the project partners to outline a shared definition framework for sustainable tourism in the Nordics and a further two workshops where experts on sustainable tourism from all over the Nordics were invited to join and contribute to a structured debate with the aim of examining the many issues and futures of sustainability and regeneration in tourism. The project benefitted greatly from the participation, dialogue and contributions of over 70 Nordic and international experts who took part in the workshops, meetings and other platforms created by this project. Group NAO submitted an interim report with a summary of findings and analysis from the workshop and webinars which provide an important contribution to this report.

# About the Workshops

## Workshop 1: Envisioning the Future of Sustainability

The objective of the first workshop was to define and discuss possible future scenarios of sustainability in Nordic tourism. The workshop was structured around contributions from world-class experts on tourism trends and futures, marketing and sustainability. The expert contributions were followed by breakout sessions for analysis and discussions on the topic. Discussions were structured around these key questions:

1. What are the three key ideas to unlock the future of sustainability in Nordic tourism?
2. Who needs to do more?

### WORKSHOP 1

Who?	Why?
<b>Jeremy Sampson</b> CEO of the Travel Foundation (NGO) and Chair of Future of Tourism Coalition	To talk about the work of the "Future of Tourism Coalition", the Travel Foundation and the research published in their report "The Invisible Burden of Tourism". The objective of the Future of Tourism Coalition is to make tourism a force for good in local communities, insisting on accountability and transparency and addressing the full and wider costs of tourism to the destination.
<b>Elke Dens</b> Marketing Director at VisitFlanders and Chairman of the Marketing Group of the European Travel Commission	Elke is an award-winning marketer, leading a paradigm shift in destination marketing towards sustainability and responsibility. The future of tourism depends on making a shift in destination marketing from simple focus on bringing more customers to adding value, not only to customers, but importantly, to local communities. A shift must occur from extractive to regenerative and from disempowering communities to empowering communities.
<b>Katarina Thorstenson</b> Sustainability Strategist and Destination Development with Göteborg & Co	The city of Gothenburg is a leader in sustainable destination development, top of the Global Destination Sustainability (GDS) Index and winner of the 2020 European Smart Tourism Capital and Award in Sustainability. In November 2020, Göteborg & Co launched

a platform for open sharing of the best global ideas for sustainable tourism “101 Sustainable Ideas for Better Tourism”. Katarina shared her views on the importance of benchmarking and how the GDS Index can be an important tool for sustainable development.

Who?	Why?
<b>Peter Rømer Hansen</b> Founder, Group NAO	Peter presented a newly launched white paper on tourism taxes with a focus on designing taxation structures for sustainable and regenerative purposes. The white paper “Tourism Taxes by Design” explores different design and roles of tourism taxation.

## Workshop 2: Barriers and Challenges

The second workshop was dedicated to exploring barriers and threats to realising objectives on sustainability and regenerative tourism in the Nordics. Again, the workshop was structured around contributions from world-class experts on tourism trends and futures, marketing and sustainability. The expert contributions were followed by breakout sessions for analysis and discussions on the topic where the Four Futures method was used to facilitate discussion and analysis of the themes. Discussions were structured around these key questions:

1. What are the key barriers to more sustainable tourism?
2. What should we stop doing?
3. What are the biggest threats to Nordic tourism in the next 10 years?
4. How can these threats be addressed at the policy level?

### WORKSHOP 2

Who?	Why?
<b>Guy Bigwood</b> CEO, Global Destination Sustainability Movement	The Global Destination Sustainability -Index works with 70+ global destinations to motivate their sustainable development and progress. The organisation advocates a collaborative approach to sustainable and regenerative development in tourism, calling for better measurement of performance with meaningful metrics and data as key to unlocking the future.
<b>Jos Vranken</b> CEO, NBTC Holland Marketing	The national tourism strategy of the Netherlands, “Perspective 2030”, outlines a key shift in tourism approach from growth to

balance. In implementing the strategy, the Dutch national tourism organisation embraces a shift from growth (volume) to value and balance, from tourism as a goal in itself (tangible) to tourism as a means (intangible). To guide decision-making, there is a need for better data to measure impact and progress, to feed into new KPIs which reflect the desired transition.

Who?	Why?
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**Rosa Bada**  
Head of Institutional Co-operation at Barcelona Tourism and Head of Secretariat to Barcelona Tourism Council

The Barcelona Tourism Council has been identified as an international best practice in establishing a citizen-participation body with a role in tourism planning and decision-making. ---- The ambition is to make the Council a permanent space for dialogue and work on tourism with all citizens – both in reflection of the city's challenges of overtourism, but also in reflection of tourism as one of the city's main assets.

Who?	Why?
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**Idrissia Thestrup**  
Senior Manager, Destination Development & Marketing, Visit Greenland

Local resident sentiment surveys have been given particular focus in Greenland. This has been important because it means that resident sentiment will be regarded as integral methodology in tourism policy and development. In line with this, the upcoming new tourism strategy from Visit Greenland proposes a more integral approach to tourism that balances community wellbeing with overall strategy.



Photo: Daniel Rasmussen, VisitDenmark. Jægersborg Dyrehave. Horse back riding in Dyrehaven north of Copenhagen

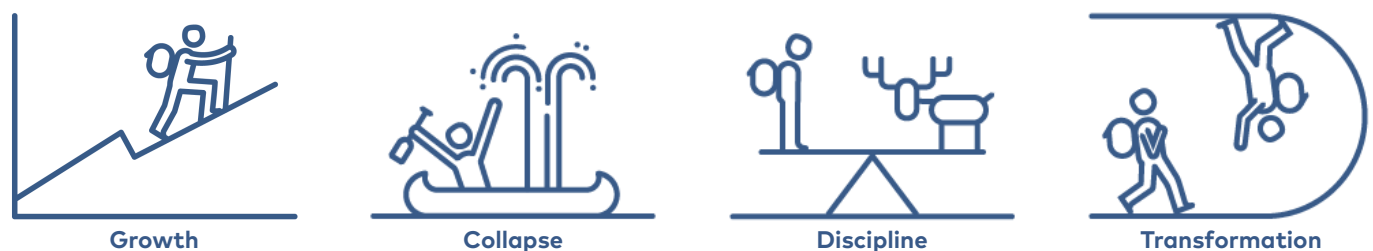
# Future Perspectives for Nordic Tourism Sustainability

To facilitate a constructive discussion about future scenarios, exploring the options, actions and the possible outcomes when working towards sustainability in Nordic tourism, a Four Futures Framework analysis was carried out, facilitated by Group NAO.

The Four Futures Framework was used in order to encourage creative discussion and the exploration of possibilities for possible future scenarios for sustainable tourism. The aim was to give participants the freedom to move beyond describing the future in terms of conventionally accepted truths and rather to encourage them to develop a collectively preferred future<sup>7</sup>. Nordic and international tourism experts were encouraged to envision and discuss “the new possible futures” of sustainability in tourism within the Nordics and the barriers that stand in the way of the envisioned progress. The discussion about the possible futures of Nordic tourism sustainability was inevitably coloured by the disruptive events following the onset of COVID-19 and the enormous pressures currently experienced by the tourism industry in all the countries as well as globally.

## About the Four Futures Framework

The premises of the Four Futures Framework<sup>8</sup>, as conceived by futurist and Professor James Dator, is that all stories we tell about the future ultimately fall within four distinct categories:



7. Dator, J. 2019. Journal of Futures Studies. 14 (2): 1–18 in Group NAO op.cit., 25–29.

8. Group NAO. Op.cit. 27–37.

The Four Futures scenarios provide a useful framework for thinking about tourism sustainability. Although representing very different outlooks, the categories do not have to be mutually exclusive. As can be seen from the mapping of current Nordic practices, several of these scenarios could be in play as part of the future possibilities of sustainability in Nordic tourism. The benefits of outlining scenarios lie in making it possible to imagine alternative futures, aligning them to objectives and starting to think about the means towards those objectives.

When evaluating future scenarios, there is a tendency to think that the most desirable outcome is the big, transformative future. However, there may be aspects of the current trajectory that are the right solutions to a particular context. There may also be other situations where introducing new regulations or restrictions will indeed ensure the desired results for sustainability. The ultimate point is that each scenario can help to break down, structure and understand shared goals for sustainability in tourism and the means to achieve it<sup>9</sup>.

### **Growth**

This category represents a continuation along the current trajectory of sustainability in Nordic tourism, including continued economic growth and widening prosperity.

### **Collapse**

The current trajectory will come to a sudden halt, and our ways will fall apart. The COVID-19 pandemic represents a temporary collapse of tourism, an event which has provoked a debate on how to restart tourism. While many are eager to "return to normal", there have also been strong advocates of "rethinking" tourism post the pandemic.

### **Discipline**

New controls, restrictions, regulations are introduced to prevent the current order of things from collapsing.

### **Transformation**

Entirely new systems and ways of being and doing are introduced and implemented, representing a complete trajectory shift. Disruptive innovations and technologies contribute to the possibility of such a scenario.

## **A Growth Scenario – Growing Back Stronger**

The Growth Scenario is a future defined by simply pursuing the trajectory Nordic tourism industries are already on, growing tourism steadily to support and sustain strong Nordic visitor economies. The Growth Scenario does not exclude sustainability as an option, but as the core logic and primary measure of success is continued, or recovered, sustainability is considered an add-on to other activities driven by market demand.



9. Group NAO. 2020. *Nordic New Possibilities*. Interim report for the project Monitoring Sustainability in Tourism in the Nordics. 23–26.

Sustainability is promoted as an individual choice.

In short, sustainability is considered to be one means, among many, to achieving the overarching goal of continued or recovered growth.

There is an overall agreement that we need to change our ways and that the current trajectory will not, in the long run, be sufficient to ensure a truly sustainable future. This observation obviously applies not only for tourism, but for our communities, societies and planet at large. There is also a perception that while the Nordic countries have until now been considered leaders in sustainability, simply continuing along the tracks laid out will not be enough to stay ahead of the curve. A Growth Scenario of continuing along the set course therefore did not find a lot of support among the expert participants. On the contrary, the majority sentiment favours replacing volume with balance as a measure of success.

This is also the position taken in the Netherlands' national tourism strategy *Perspective 2030*. In this strategy, the overall vision is for every Dutch person to benefit from tourism by 2030. Shifting the focus from economic growth as the key driver for tourism, *Perspective 2030* points to tourism as a means to solving major social issues and, through those means, to contribute to public interest. The strategy does not focus solely on economic growth as the foundation of public benefit, but also recognises that the interests of residents have often been marginalised in the development of tourism and that they now deserve to be a priority.

Another example is provided by VisitFlanders, where the future vision for tourism is an overall goal of flourishing communities and where the emphasis on growth is replaced by the ambition for tourism to add value to all community sectors and stakeholders.

In the context of this discussion, the expert participants in the analysis expressed frustration with the parameters used to measure the success of tourism, as the existing framework of KPIs is primarily based on measurements of volume and growth.

Despite the strong general agreement that the current trajectory towards sustained tourism growth will simply not be viable in the long run, the Nordic experts report an increased pressure "to grow back tourism" after COVID-19 as fast as possible. Should that be the dominant trajectory for tourism post-COVID-19, the Growth Scenario could come to characterise the early post-pandemic future, where industry interests and concerns over economic setback and job losses will be the highest priority and prevalence.

### ***The Role and Focus of Monitoring in the Growth Scenario***

*Monitoring sustainability in tourism in the Growth Scenario will be defined by existing KPIs and metrics, primarily based on visitor growth and economic impact. Monitoring of sustainability in tourism will continue to be primarily activity based.*

## A Collapse Scenario – From One to Multiple Crises

A possible future of collapse is characterised by the lack of action and the immensity of the barriers keeping tourism from realising other possible future scenarios. The Collapse Scenario is one of sudden standstill and overturn.

While the COVID-19 pandemic has felt like a prolonged period of tourism collapse, it is more likely to be an extended pause with a strong urgency to recover and rebuild what has been lost during this pause. Nonetheless, the pandemic has fuelled a broader awareness of the lurking multiple crises that threaten collapse, a crisis of tourism but far beyond tourism as well, including of course the eminent climate crisis.

The pressure to return as fast as possible to an economic recovery and the recovery of the tourism industry post-COVID-19 may result in a different kind of collapse. This is a collapse that in the long run will stand in the way of sustainable progress, i.e. the collapse of collaboration and strong co-ordination, followed up by lack of action and unwillingness to share practices and experiences openly and transparently, both on national and international levels. The forces at work behind such a crisis can, e.g., be increased competition to regain markets and a one-sided focus on ensuring turnover rather than a holistic approach to sustainable economic, social and environmental recovery. This scenario was seen in the early re-opening in the summer of 2020, where European destinations hurled into a price and discount competition, like Sicily's offer to discount plane tickets and paying for one of every three hotel nights, Bulgaria making tourist hotspots free of charge, Cyprus offering to pay for your quarantine stay or destinations, like Greece, alleviating transportation or accommodation taxes.

Tourism experts are keenly aware of the risk of simply going back to business as usual. As one workshop participant put it: "there is no business on a dead planet". Working in collaboration and with strong co-ordination between initiatives, sectors, organisations and countries is key to pushing for change needed to avoid collapse. Strong collaboration on all levels is also necessary in order to ensure continued accountability and transparency in monitoring the progress of change.

A one-sided focus on tourism growth is also seen as a threat to the social balance and the support and involvement of local communities in tourism development and, in the long run, to the legitimacy of tourism. Nordic destinations and international experts agree that collapse awaits destinations that fail to consider the social aspects of tourism development, including the impact on local communities and residents' quality of life.

The Collapse Scenario may also in some respects be fuelled by fears of decreasing future funding and insufficient prioritisation of tourism at the policy level. This fear persists despite that many destinations have actually experienced tourism being given more attention and policy priority in the pandemic crisis. The fact remains that sustainability in tourism will require both substantial funding as well as policy-level priority and engagement in



future years. Without funding and priority, the required level of holistic ambition will not be realistic in future scenarios.

One major Collapse Scenario overshadows and even defines most others. This is the one of climate change and the ensuing hybrid crises. Hybrid crises refers to the multiple other crises that will follow from climate change: social inequality, disaster displacement, global hunger, migration, conflict, etc.

There is a shared belief among participating experts that if no action is taken, an even more serious crisis awaits beyond the pandemic crisis. The consequences of weak policy and inaction will have a massive impact on the Nordics in terms of overtourism, overpopulation and pressure on natural habitats. The tourism sector must be a part of solving these major threats posed by climate change and other major global challenges.

### ***The Role and Focus of Monitoring in the Collapse Scenario***

*The Collapse Scenario is characterised by a future in which monitoring has also collapsed – lack of collaboration, transparency and sharing; failure to address the major challenges of climate change; and the negative impact of tourism, all of which point to an overall failure in monitoring and data-based decision-making.*

## A Discipline Scenario

### Finding Balance

The Discipline Scenario involves the introduction of new restrictions and regulations to prevent the collapse of the current order of things. In this scenario, the focus is on the prevention of crisis and on reducing risk or impact. This scenario can be envisioned as part of a stronger monitoring framework. An outcome likely to take place in the discipline scenario is a changed role and value proposal for DMOs and tourism organisations, with the change being a transition from being primarily destination promoters and marketers to giving prominence to destination management.

The Discipline Scenario is about finding balance, a key word in the tourism discussions over the past years. The discussion on the need to find balance was equally present in this project. The Discipline Scenario regards monitoring as a means to keep tourism in check and ensure that it does not develop beyond the limits of the destination's carrying capacity.

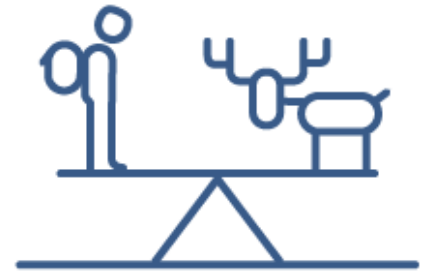
The essence of this scenario centres on a future of "doing less bad", with requirements of strong accountability and transparency as prerequisites for ensuring desired outcomes. While words like discipline, regulation and limitation may not, at first look, inspire a very positive future outlook, regulation and clever destination management can be both necessary and effective. This is demonstrated by a destination like Amsterdam where radical choices have been made to limit the visitor pressure in the city centre and to cap the number of cruise ships calling the city port. The push for stronger and better regulatory frameworks to limit the negative impact of tourism on the environment, on cultural heritage and on local communities is not just a Nordic phenomenon.

A clear indication of the pervasiveness of the Discipline Scenario is the continued attention given to the need for tourism organisations such as DMOs and NTOs, to make a transition from primarily promoters and destination marketers to taking on the role of destination managers. This transition signals a shifting paradigm with regard to tourism sustainability and requires a change of the measures of success for the industry. The shift calls for new KPIs that go beyond bed nights and marketing objectives and also requires the introduction of new organisational structures and skillsets within tourism.

To ensure stronger integral decision-making, international and Nordic experts call for better metrics, reflecting a transition from growth to balance. Such metrics will contribute to ensuring a much stronger foundation for data-based policy development, building the future of sustainability in Nordic tourism on a holistic foundation, looking at the full impact of tourism as opposed to the more limited, often mostly economic impact understanding that is most common today.

### ***The Role and Focus of Monitoring in the Discipline Scenario***

*Monitoring will be about limiting negative impact, "doing less bad" and continuously managing growth to balance against wellbeing and sustainable compliance for the local communities, the industry and the*



*guests. In the Discipline Scenario, monitoring can also include aspects of the positive impact that tourism can bring to the local communities, nature, culture – and guests.*

## A Transformation Scenario

Committed to regeneration

The Transformation Scenario is characterised by a more evasive, disruptive shift in worldview than the other future scenarios. This involves a systemic value transition in tourism and beyond, shifting from doing less bad to "doing good" which is not simply a question of tweaking, but a more radical transformation involving approach, understanding, skillsets, co-operation and business models. The Transformation Scenario is one of regeneration, circularity and thriveability, all of which are mere dream scenarios unless matched by new innovative technologies, tools and insights developed through dynamic cross-sector collaboration.

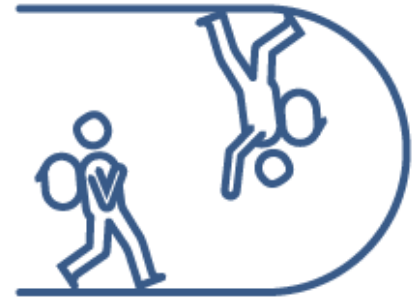
The Transformation Scenario is extensive and calls for change across all levels, from organisations to value systems to business models and policy making. Overall, transformation relies on a value-based change that transcends multiple aspects of developing tourism, starting with a core question of how and where tourism can add value to communities and contribute to mitigating global challenges. As summarised by expert contributor Elke Dens (referencing Anna Pollock):

*We are facing a shift from simply bringing more customers to adding more value both to customers and to society and the community. It is a shift from the extractive to the regenerative, from a focus on more money to more net benefit, from tourism developed in silo to being fully integrated in interplay with the place and from the disempowering of communities to empowering communities.*

In this future, destination marketers work from an understanding that they are promoting not a product, but a place where actual people live. But it goes far beyond this across all aspects of tourism and further. In the Transformation Scenario, tourism planning does not happen in isolation from communities, but rather in a process fully involved and engaging with community. This is a future of more democratic tourism planning and working across sectors, across agendas to ensure a sustainable, thriving society.

In 2020, Innovation Norway invited openly for input to the national tourism strategy, while in Barcelona, they have worked over the past years to establish the Tourism Council as an open, diverse citizen-participatory body that discusses what kind of city they want and how tourism can serve the city to achieve that. The involvement goes beyond monitoring satisfaction (or dissatisfaction) with tourism among citizens; it is about democratic co-creation of places, societies with tourism as an integral part. The truly transformative scenario will also require completely new thinking and innovation, including in technologies, methodologies and tools. Expert participants shared a strong focus on the need for open knowledge sharing and collaboration.

As part of the Transformation Scenario, project partners and experts also



envision tourism “breaking out of its bubble” and unfolding as a tool for contributing to environmental and economic regeneration of destinations. Several of the Nordic tourism organisations are exploring new KPIs and metrics based on broader measures like the UN Global Goals (SDGs), shifting towards a more holistic focus on the entire eco-system of which tourism is part and addressing the potential of tourism to play a positive role in the regeneration and rejuvenation of that eco-system. To do so, there is broad agreement across project partners and experts that there will be an urgent need to transform data strategies towards a much more holistic, updated and accessible data setup to allow for monitoring of progress and targeted decision-making.

### ***The Role and Focus of Monitoring in the Transformation Scenario***

*Monitoring is considered a key instrument to pushing forward change and transition in the Transformation Scenario. This will involve not simply a few new common metrics and benchmarks, but much more holistic, cross-sectoral, cross-border data strategies with highly updated data sources in order to continuously allow for informed, data-based policy development to drive further innovation and change.*



Photo: Asko Kuittinen. Business Finland. Summer in Rautavaara, Finland

# Methods of Monitoring Sustainability

All the Nordic countries are very aware of the need for finding a useful reference point for measuring sustainability. The countries have much in common with regard to the experiences and destinations they offer, and it can therefore be expected that the countries have much to gain from sharing successful practices and knowledge.

The Nordics have been world leaders in developing sustainability in tourism for many years. As such, several of the Nordic destinations have both experience, data, capability, recognition and brand value as sustainable destinations. Sustainability is a top political agenda in the Nordic countries and has been given priority in the public and private spheres. Nevertheless, all the countries have struggled to identify meaningful and persistent metrics to monitor the progress of sustainability. This, of course, has important implications for setting and achieving the objectives which are not only urgent in relation to tourism, but also in the broader context of an environmentally viable planet.

Perspectives on sustainability in tourism have undergone several paradigm shifts in the last decades. The shifts reflect a change in the overall prominence and urgency of environmental and climate issues on the world stage. In tourism, the shift has been from pollution and footprint reduction to a comprehensive focus on the UN Sustainable Development Goals and beyond them to holistic regenerative rethinking. This can also be viewed as a shift from defensive compliance to transformative regeneration. This is also a shift towards a proactive approach to tourism, where tourism development is no longer something that happens to destinations as an add on activity but rather where tourism and sustainability have become part of an integrated agenda in economic development<sup>10</sup>.

This holistic approach can be seen in the Nordic Council of Ministers' publication "Sustainable Consumption and Production, an analysis of Nordic progress towards SDG12". The report calls for a more holistic approach to the development of tourism and creating conditions that would help make tourism a more positive force in economic, environmental and social development.

Together, the Nordic countries have prioritised sustainability in their joint Vision 2030 for the Nordic region, and the countries share a common commitment to the UN Sustainability Goals and the Paris Agreement. Across the Nordic countries, the triple helix of "environmental", "social" and "economic" sustainability is a core principle in working with sustainability in tourism. All Nordic countries use the UNWTO definition of sustainable tourism.

An important part of developing the discussion and insights on which the findings and recommendations of this project are based was to raise questions that, while they may seem slightly banal, probe at the core problems which must be tackled in order to develop an understanding of how to monitor sustainability.

1. Why are we monitoring sustainability in tourism?
2. Who are we monitoring?
3. What are we monitoring?
4. Who is doing the monitoring and how?

The answers may vary, but the questions provide a framework for thinking about the objectives and desired outcomes from monitoring sustainability in tourism. They also provide a platform for mapping the different approaches used by individual countries to monitor sustainability.

Sustainability has long been a theme in public and political discourse in the Nordics but has only recently become widely adopted in policy and strategy practice. All Nordic countries either already have or are about to publish national tourism strategies where sustainability is a key priority or an overarching agenda.

In recent years, policy focus has been on environmental and green sustainability of tourism. This focus appears to be broadening and moving increasingly onto economic and social sustainability. As a result of this broader perspective, tourism planning has become more inclusive and sensitive to citizen involvement and sentiment monitoring.

Several of the Nordic countries are making a shift towards an integrated strategy approach to sustainability. This is a shift towards more systemic thinking rather than the siloed linear thinking, where sustainability in tourism has been approached more as a stand-alone activity or project. Sustainability in tourism is increasingly being seen as an internal responsibility and a necessity, rather than a response to external market demand. All Nordic countries have activities or programmes to grow industry compliance within frameworks of certifications, standards or similar, though these programmes are not necessarily initiated nor managed by the NTO. Experts from all countries agree that sustainability in tourism must be seen as a priority in the post-COVID-19 recovery of tourism. This point is often expressed in terms of increased urgency and priority of sustainability in the recovery plans for tourism development after the pandemic.

There is a need for a practical framework against which the impact of

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10. Group NAO. 2020. *Nordic New Possibilities*. Interim report for the project Monitoring Sustainability in Tourism in the Nordics.

tourism and travel can be measured in terms of statistical information. On the other hand, there is a clear awareness that sustainability in tourism is a highly complex and dynamic area and that metrics and methods must continuously reflect these changes to be meaningful. The questions of what we are measuring and why are we measuring it must continuously be under review. Collaboration on sharing meaningful metrics will contribute to a shared vision for the future of sustainability in Nordic tourism.

The European Travel Commission has developed a common framework for measuring sustainable tourism indicators. The objective with ETC's Sustainable Tourism Indicators (STIs) is to provide an integrated approach that allows comparability of available data for effective monitoring and measurement purposes. While only 4 of the Nordic countries are currently taking part in the ETC's STI project (Denmark, Norway, Finland and Iceland), most already measure some of the key indicators used in that framework. STI indicators can therefore be regarded as a useful common reference point for the Nordics and a practical framework for further development on tourism statistics. It is, however, important not to stop there, but also to continuously evaluate the use and meaning of the metrics for sustainability in tourism and travel.



Photo: Gunnar Bækkevold, VisitNorway.com. Tretopphytter, Oslofjord, Norway

## Mapping the Nordics

Development of projects and tools to monitor the impact of tourism is an important requirement for more effective tourism policy development and destination management in the Nordics. A number of such instruments are being used or are under development in the Nordics. Examples include an ambitious project initiated by the Icelandic Ministry for Industries and Innovation and led by the Icelandic Tourism Task Force on developing impact indicators for Icelandic tourism<sup>11</sup> and the development of the Sustainable Destination Standard led by Innovation Norway<sup>12</sup>. Both Denmark, Norway, Finland and Iceland are also involved in the ongoing ETC project about Sustainable Tourism Indicators. Better tools will provide a stronger base for prioritising resources and actions to strengthen the tourism industry in the Nordic countries as a whole.

The matrix outlines ongoing approaches to monitoring sustainability and structuring frameworks and actions to reach sustainability objectives.

The colour scheme reflects that of traffic lights, indicating the status of policy and projects in the countries.

National & NTO framework	Policy & strategy	Funding with sustainability as priority	Key target group Industry / Destinations / Travellers	KPIs	Analysis & data	Branding & marketing	Recovery
Denmark	National strategy on sustainable growth in tourism (coming 2021); Wonderful Copenhagen Tourism for Good strategy (2019).		Industry: Green Key, etc.  Urban destinations: GSDI ratings	Participation in ETC to identify sustainability indicators; Develops national and regional/local STIs accordingly together with CRT indicators	Brand surveys on sustainability among potential tourists  Green Key analysis	Sustainability communicated in a subtle way, fx "Nachhaltigkeit macht Spass"	Several kickstart projects about sustainability (and part of new strategy coming 2021)

11. <https://www.stjornstodin.is/calendar-event/alagsmat-throun-alagsvisa-1-afangi>

12. <https://www.gstcouncil.org/innovation-norway-sustainable-destination-standard-is-now-a-gstc-recognized-standard/>

<b>Faroe Islands</b>	Action Plan 2017  Tourism Development Strategy 2018		Industry: professionalisation  Travellers: closed for maintenance			Closed for maintenance	
<b>Finland</b>	Sustainability is one of the focus points in Finland's national tourism strategy: Achieving more together – sustainable growth and renewal in Finnish tourism' 2019–2028.	Funding programmes have been started after the pandemic broke where sustainability is seen as one aspect but not focussing solely on sustainability	Industry & destinations: Sustainable Travel Finland programme Industry: carbon-neutral tourism Travellers: sustainable tourism promise/pledge and STF label (website)	Business Finland is developing KPIs	Indicators are soon ready for Sustainable Travel Finland Q1/21  DataHub	Focus on enhancing the image of Finland as a sustainable, safe (health safety) destination; room to room, clean air, local culture, etc.	Recovery is part of strategy and everyday work. Monitoring is carried out on the different markets' focus on sustainability and health & safety
<b>Greenland</b>	National strategy on sustainable tourism in hearing process	Sustainability is the backbone of the 2021–2024 tourism strategy	Industry: SDG accelerator, quality and safety label scheme	Local sentiment about tourism development		Tourism Award.  Upcoming branding campaign.  Marketing toolbox for local operators	Tourism is just starting in Greenland – therefore current strategy remains unchanged and covers recovery too
<b>Iceland</b>	"Leading in Sustainable Development" – Policy framework for tourism until 2030	Sustainability as core parameter	Destinations & industry: model site programmes  Industry: Vakinn, the official quality and environmental certification for Icelandic Tourism Certification  Travellers: Long-Term Strategy for Icelandic Exports	Tourism Impact Assessment for Iceland	Tourism Impact Assessment for Iceland	Long-Term Strategy for Icelandic Exports	Part of current strategy. "Leading in Sustainable Development" - Policy framework for tourism until 2030
<b>Norway</b>	National tourism strategy with sustainability focus coming	Sustainability as core parameter in most funding	Industry: training, sustainable business models, B2B	National KPIs will follow the national tourism strategy	Regular data on tourism sustainability.  Climate	Green Travel / Sustainable Destinations/ Green Universe	Important part of National Tourism Strategy to be launched 03-

	(2021)		workshops, etc.  Destinations: labelling / certification  Travellers: Green Universe / Green Travel		calculations.  Tourism economic value added		2021
<b>Sweden</b>	National strategy on sustainable tourism coming (2021)	Sustainability as core parameter in public funding	Industry: sustainable business models, product dev. tools & labelling, training Destinations: place & product development  Travellers: marketing the "global traveller" eco-tourism.	Assignment 2021 to develop assessment criteria (KPIs) for sustainable tourism development	Study on environmental impact of tourism; Insights & knowledge as part of a national sustainability initiative	Tourism Award; Working on a national tourism pledge	All funding has demands on sustainable deliveries. The upcoming national strategy will be based upon sustainability and delivery on the SDGs



Photo: Simon Paulin, imagebank.sweden.se. Old Town, Stockholm, Sweden

## Nordic Best Practices

There is already an array of best practice examples; projects, programmes and solutions being developed and implemented in all Nordic countries with the aim of working towards environmental, social and economic sustainability within Nordic tourism.<sup>13</sup>

Following are some inspirational highlights from the countries

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13. Hillgrén, A., Bröckl, M., Descombes, L., Kontiokari, V., and Halonen, M. (2018). Nordic Best Practices. Relevant for UNEP 10YFP on Sustainable Tourism and Consumer Information. TemaNord 2016:546.



Photo: Daniel Villadsen, VisitDenmark. Dybbøl Mill. Couple with their bikes, enjoying the view over Sønderborg Bay

# Denmark

## Regional Measurement of Sustainable Tourism in Denmark

### About the project

In 2020, the Research Centre for Regional and Tourism (CRT) launched a project called "Bæredygtigt Turismeregnskab" with the purpose of creating a tool to measure sustainability at the regional and local levels to support measurement at the national level. The project will last for 2 years and includes the following partners: Danske Destinationer, VisitDenmark, Dansk Kyst- og Naturturisme, Centre for Landdistriktsforskning and Nordregio.

### Why?

Tourism Satellite Accounts are widely recognised as a suitable framework to analyse the economic impact of tourism. Recommended by the OECD, the accounts include data on, for instance, inbound and domestic tourism expenditure, employment and job creation, the value of goods and services produced in the sector and tourism's share of GDP. In Denmark, CRT produces an annual RTSA in close co-operation with VisitDenmark, analysing the economic impact of tourism at the national level all the way down to the local level. The accounts provide a good indication of the state and development of tourism in each municipality. The new project aims at adding data and KPIs for the environmental and societal impacts, too.

### What is the ambition?

In 2021, a new sustainable national strategy for tourism is expected to be published, including economic, environmental and societal KPIs at the national level. The ambition of the project is to be able to deliver a tool to measure sustainability and set KPIs at the regional/local level.

The national KPIs are being developed based on the experiences and the results of the ETC "Sustainable Tourism Indicators" project. In a perfect world, the Danish measurement model could be used for Nordic and/or European comparison. Benchmark would be too ambitious a word to use, due to national differences.



Photo: Unsplash.com. Faroe Islands

# Faroe Islands

## Closed for Maintenance – Open for Voluntourism

### About the project

In 2019, the Faroe Islands saw unprecedented success for its first-ever closed for maintenance, open for voluntourism campaign, which forms part of a wider move by Visit Faroe Islands to pave the way for a sustainable future for the islands and our burgeoning tourism industry.

Visit Faroe Islands invited 100 voluntourists (more than 3,500 signed up for 100 slots.) from all over the world to come and help restore and maintain selected sites, working alongside locals.

### Why?

Since Visit Faroe Islands went from being a destination marketing organisation to a destination marketing and management organisation (2018), we wanted this to be reflected throughout our work – as well as our marketing campaigns. The aim was to make the tourist become a part of the solution, and that message is important for a small island community like ours.

Second, the campaign also strengthens the relations between Visit Faroe Islands and local tourist information centres and municipalities as it becomes a common goal to execute the event successfully. This part of the event is also important to ensure and maintain community engagement within the growing tourism sector.

### What is the ambition?

Within 24 hours of registration opening for the 2020 'Closed for Maintenance, Open for Voluntourism' initiative, 5,886 voluntourists signed up to be part of the maintenance crew in the Faroe Islands – over 2,000 more people than for the 2019 project.

The venture has been so successful that we plan to do these projects every year.



Photo: Mikko Nikkinen, Business Finland. Winter Camping, Saimaa, Finland

# Finland

## Sustainable Travel Finland – Programme

### About the project

The Sustainable Travel Finland – Programme (STF-Programme) is a low threshold national sustainability programme for companies and destinations alike. It's actually not a programme but an ongoing process. The Sustainable Travel Finland programme is aligned with international sustainable tourism programmes and Sustainable Development Goals, but it is tailored for regional and national needs. The programme is developed in cooperation with the Finnish government, regions and companies. The programme has a holistic approach to sustainable development, moving beyond only environmental concerns and towards a more inclusive industry that secures the vitality of communities while reducing economic inequalities.

The STF-programme is a 7-step programme that comprises all aspects of sustainability: economic, ecological, social and cultural and provides companies and destinations with a concrete toolkit that makes it easier for companies and destinations to adopt sustainable practices and choices in everyday business. Once completed the companies and destinations are rewarded with the STF-label. The companies will be audited regularly.

The programme serves three purposes:

- Low-threshold, free programme for the Finnish tourism industry, destinations and companies
- Marketing communication tool for Visit Finland and stakeholders
- Label for consumers and operators to identify sustainable travel companies and destinations

### Why?

Sustainability is one of the focus points in Finland's national tourism strategy: Achieving more together – sustainable growth and renewal in Finnish tourism' 2019–2028. Finland aims to become the most sustainably growing tourist destination in the Nordic region. The STF-programme is designed to nurture, conserve and preserve what is most important to us:

Finland's unspoilt natural beauty – as well as Finnish culture and lifestyle, which are rooted in our pure and pristine nature.

The STF-programme helps to implement many of the set goals on national and regional levels e.g., to cut carbon emissions and fight climate change. Now, after the global outbreak of the COVID-19 pandemic, it is even more crucial to put all operations on a sustainable base on all levels.

#### What is the ambition?

Visit Finland wants to make sustainability the new travel industry norm and to make Finland one of the most sustainable travel destinations in the world. We have to preserve our nature, pure waters, clean air and culture for the generations to come and the time to act is now. Climate change is one of the biggest challenges of our time and with this programme we will help to change the course of Finland's travel industry to a more sustainable one. Visit Finland's vision on sustainable development is to be the world leader in sustainable tourism by 2025.



Photo: Unsplash.com. Ittoqqortoormiit, Greenland

# Greenland

## Local Sentiment about Tourism Development

### About the project

Visit Greenland strategy's backbone for the period 2020–2024 is sustainability. A destination cannot truly have a sustainable tourism development if the local populations are anti-tourism. Since 2019, Visit Greenland has conducted a survey among the local population in Greenland to assess how they feel about tourism and tourism development in their regions, towns and settlements.

### Why?

The local sentiment is vital to assess the sustainability of a destination. Sustainability therefore not only means respecting the environment and culture and having a positive impact on the economy, but it also means the populations within the destination view tourism development in a positive way.

### What is the ambition?

The ambition of this survey is to have a truly sustainable development that is happening at a pace and taking a direction that will not only benefit the local populations, but that is also done with the local perceptions and priorities at the centre. This will help also highlight potential friction points.

This has been especially important in the light of the COVID-19 crisis, which has brought with it a natural fear of tourist entry to small and fragile communities with challenging health infrastructure. The analysis highlights how much effort must be made in the dialogue with the citizens as well as measures to ensure that they feel safe in the reopening of tourism and thus are ready to welcome visitors.

The "Local Sentiment About Tourism Survey" is an official and national tool used by the tourism board since 2019 to assess that tourism development is done in accordance with local population wishes. This tool is important because making the monitoring of resident sentiment obligatory means that it will shift to an integral methodology in tourism policy and development. In line with this, the upcoming new tourism strategy from

Visit Greenland proposes a more integral approach to tourism that balances community wellbeing with overall strategy.



Photo: VisitIceland

# Iceland

## Tourism Impact Assessment for Iceland

### About the project

The objective of the project is to assess the pressures caused by tourism on local infrastructure, environment and society in order to create a framework to assess the carrying capacity of key components of infrastructure in Iceland. The aim is to provide the means to assess what improvements are needed, how they can be realised in the most agile manner and how capital intensive they will be.

### Why?

In the years leading up to the COVID-19 crisis, the growth in tourism had placed considerable pressure on basic infrastructures in Iceland, including airports, ports and roads, housing and accommodation, services and destinations. Tourism also caused pressure on other types of infrastructure, such as drainage and waste disposal systems, as well as healthcare, law enforcement and safety services. There are also social and environmental impacts to be accounted for.

### What is the ambition?

As tourism has become an important economic driver, it is increasingly important to create a solid foundation for a sustainable tourism policy through data-based tourism impact assessment.

The hope is that the framework will become a useful tool for policy development, assessment of regional carrying capacity and the assessment of future scenarios and how best to respond to them.







Photo: Sara Johannessen, VisitNorway.com. Alta - Overnight hike with dogs Trasti Trine

# Norway

## Innovation Norway "Sustainable Destination"

### About the project

The Sustainable Destination scheme is a destination management tool. It provides the framework for sustainability action and monitoring capabilities and provides a recognition for the destinations that achieve the certification. The destinations build on a common strategic framework and a plan of action considering five categories of criteria and indicators that need to be measured and documented. The categories are political commitment, destination management, nature/culture, social values, economic viability.

The scheme engages a range of local public and private sector stakeholders together with the host community. The scheme has international credibility and reflects Norwegian realities. As of early 2021, more than 50 DMOs covering more than 110 municipalities are involved in the scheme.

### Why?

Sustainability efforts at destination level in Norway were fragmented and inconsistent. Destination managers lacked the tools and information to manage tourism at the destination level in a sustainable way. To guide the way, a common standard, operational tools and analysis, trained advisors, a monitoring digital platform and an assessment and audit system were developed combined with funding opportunities for destinations. Using the tool provides the destination with a framework for sustainability action and a means of monitoring improvement. It raises awareness and know-how of sustainable tourism management and helps increase cross-sector tourism co-operation, especially at the local level. A dedicated project is combined with long-term targeted improvement and delivery. It also provides the destination with a communication tool / sustainability branding to increase their competitiveness.

### What is the ambition?

Norwegian tourism is highly nature based and takes place in areas where people live their daily lives. While tourism is at a low due to the COVID-19

pandemic, it is time to reconsider malfunctions and weak strategies. The sustainable and regenerative approach is embedded in the "Sustainable Destination" scheme, and the intention is to continue assisting destination management strategies and performance in an inclusive way. The scheme is expected to involve all national municipalities with tourism ambitions and all DMOs to join in long-term sustainable development and monitoring. A national monitoring structure is being built on the strong local involvement and input from the DMOs.



Photo: Henrik Trygg, imagebank.sweden.se. Långeskär, Bohuslän, Sweden

## Sweden

### National Co-operation and Sustainable Development of Nature-Based Tourism

#### About the project

The objective of the project was to strengthen the international competitiveness of Swedish nature tourism entrepreneurs and to increase the number of foreign visitors interested in sustainable nature and local culture to Sweden. The project involved Visit Sweden, the Swedish Agency for Economic and Regional Growth (Tillväxtverket), regional and local destinations and tourism companies. The goal was to arrange the international Adventure Travel World Summit, ATWS, in Gothenburg Sweden in September 2019 with pre- and post-tours around Sweden. The project started in the beginning of 2017. The first step was to involve all different partners and make a bid to the owner of the event, Adventure Travel Trade Association, ATTA. When Sweden was selected and after a clarification of roles in the subsequent months, the preparations started.

#### Why?

Nature-based activities and tourism had been in focus for some years, and the interest from foreign visitors to visit Sweden was rising. In the beginning of 2017, both Tillväxtverket and Visit Sweden had government assignments and extra funds for supporting development and communication efforts to strengthen companies and destinations working with nature-based tourism. These programmes were ending at the end of 2019, and combining our resources and working towards the same goal would make a better impact and better use of the resources. Arranging ATWS would be the "crescendo" for soft adventure tourism and for everybody involved. Nothing like this had ever happened in Swedish tourism.

To be internationally competitive, it was important to get the businesses and the destinations to work fully with sustainability. Working for a common goal was one of the most powerful ways to raise awareness and competence among regional tourism organisations and nature-based tourism entrepreneurs.

## What is the ambition?

The project economy was divided into three parts: Tillväxtverket's responsibilities, which were mainly directed towards the SME companies and business development; Visit Sweden, project management, the link to ATTA, communications and marketing activities before and after the summit; and the involved regional tourism organisations' responsibilities, which were financing the pre-summit tours for international tour operators and travel journalists and aiding the tourism companies involved<sup>14</sup>. It was clear that the three-party constellation had one common goal and different responsibilities. The theme for ATWS in Sweden had a human approach: "Omtanke".

An overall way of formulating the goal for the whole project was "to contribute through sustainable Swedish nature tourism to increasing the export value in the Swedish tourism industry". There were sub-goals for four different areas. The first three areas each had a working group with representatives from the organising themes: partnership, business development programme, marketing communications; experiences and lessons learned.

Tillväxtverket involved the seven regional destinations who were part of a governmental assignment in the process and fulfilled a preparation programme for companies, where Visit Sweden and other experts from ATTA played an important part. It involved, for example, sending a group of entrepreneurs to the 2018 ATWS in Tuscany, Italy.

All detailed goals and the KPIs resulting from enquiries that the delegates at ATWS filled in exceeded all expectations. Enquiries to the Swedish entrepreneurs and involved destinations were also extremely positive. The project was successful and resulted in better knowledge about international demands and raised self-confidence considering what Sweden has to offer. It also showed that Sweden has strengthened its position in sustainable nature-based tourism.

The co-operation with ATTA in preparing the pre-summit tours showed that there is a lack of companies strategically important for tourism development throughout Sweden, namely incoming companies that package and sell other companies' products. This is important for Swedish exports. To remedy this shortage situation, Tillväxtverket was given the opportunity, via a government assignment, to continue in 2020 working with competence development around international packaging, together with Visit Sweden and regional export promotion organisations. We used the experience from the prior ATWS project in developing the latter. Eleven entrepreneurs experienced in nature-based tourism participated for four months in digital seminars and workshops about international packaging. This also resulted in a knowledge material based on films that everyone interested can watch on <https://corporate.visitsweden.com/kunskap/internationell-paketering/>.

The companies also presented revised business models using a Circular Business Model Canvas, <https://tillvaxtverket.se/amnesomraden/affarsutveckling/cirkular-affarsmodell/affarsmodell-for-cirkular->

[ekonomi.html](#).

The experience from this collaboration method also reflects the efforts that are now being made to strengthen companies in the face of the post-pandemic recovery.

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14. 12–13 regional tourism organisations were involved in the project. Sweden has 21 regions.



Photo: VisitIsland

## Recommendations

The following recommendations outline ideas and projects that will lead to stronger Nordic co-operation and more effective policy development and practical initiatives that will make a real contribution to a more sustainable and regenerative tourism industry in the Nordics.

The recommendations are a product of the mapping and analysis which should be regarded as suggestions for actual projects which will be the first steppingstones on a longer way forward. The recommendations are aimed at collaboration at the Nordic level. This means that they focus on policy and projects that are deemed to be of value at the Nordic level and are intended to be developed further through Nordic collaboration. In some instances, the recommendations are interlinked.

### 1. Stronger Nordic Collaboration

Policy is an important tool to drive change. While sustainability has often been approached as an activity or a project, it has now become a policy priority in all Nordic countries. Some Nordic countries have issued new tourism strategies, while others have new strategies coming out in 2021, where sustainability is the point of departure and a priority. A move towards sustainability becoming an overarching integrated strategic priority in the tourism strategies of individual countries, as well as at the Nordic level, is evident.

While all the Nordic countries are committed to sustainable development at the highest governmental level and to the common Nordic Vision 2030, they differ substantially in how they approach sustainability and regeneration in tourism. There are many different policies, projects, methods and parameters at play in Monitoring the Sustainability of Tourism in the Nordics.

The call for stronger collaboration on sustainability and regeneration in tourism is at the centre of all initiatives and recommendations made in this report. Closer Nordic collaboration on sustainability and regeneration in tourism is an opportunity that can inspire a faster, more agile implementation of effective practices across the region while at the same time building a stronger common platform for the countries. A clear

message on what sustainability and regenerative tourism means in the Nordic context will make for an easier way in for customers while at the same time reflecting common Nordic values.

**The recommendation is to assign a group of experts from all the Nordic countries with the task of developing the work already started in this project; to follow up on the implementation of the recommendations made here; to develop the dialogue on sustainability and regenerative tourism further; to develop new initiatives and collaborative actions on Nordic sustainability; to communicate more effectively on sustainability and regenerative tourism in the Nordic region; and to promote more effective and open knowledge sharing and the sharing of common metrics and methods.**

**A Nordic high-level tourism manifesto could be a product of this collaboration. The development of such a charter would also demand that the necessary discussion on shared priorities and direction take place and the charter become a platform for a shared Nordic vision on sustainability. Apart from the benefit of a shared vision and shared practices, a Nordic tourism manifesto can be an effective tool for brand building.**

**Sustainable funding structures are another important area of co-ordination and collaboration with great potential value in sharing and implementing best practices. While all the Nordic countries have given attention to developing and implementing sustainable funding structures and perspective in tourism development and investment, some countries have more experience in this field than others. As Nordic governments allocate national funds to post-COVID-19 recovery measures, there has been an emphasis on making sustainability incremental to the process.**

The group is conceived of as an agile task force working under and in co-operation with the NCM Working Group for Nordic Tourism Collaboration. The mandate, budget and scope of the task force must be clear going forward and should be specified further by the NCM Working Group. Importantly, this working group on Nordic Tourism Sustainability must extend the collaboration, initiatives and involvement to a wider network of experts working at different levels of government and industry throughout the region. The network of experts should also encompass researchers and scientists in relevant fields. This wider network of experts will also be mobilised through actions which are described in further recommendations.

## 2. Regenerative Tourism: A shared responsibility

There is a call for a value-based change that transcends multiple aspects of developing tourism and destination development. This change starts with the core question of how and where tourism can add value to communities and contribute to mitigating global challenges. In developing metrics and benchmarks, the objective must not just be on becoming more sustainable, but also on working towards regenerative tourism development.

This recommendation takes off from the Transformation Scenario of the Four Futures analysis carried out in this project. The scenario involves a systemic value transition in tourism and beyond, shifting from doing less bad to contributing in a beneficial way both to travellers and to local communities. Achieving this is not simply a question of "tweaking", but rather a more radical transformation approach, understanding skillsets, co-operation and business models. The Transformation Scenario is one of regeneration, circularity and thriveability.

As summarised by expert contributor Elke Dens (referencing Anna Pollock<sup>15</sup>):

***We are facing a shift from simply bringing more customers to adding more value both to customers, and to society and the community. It is a shift from the extractive to the regenerative, from a focus on more money to more net benefit, from tourism developed in silo to being fully integrated in interplay with the place and from the disempowering of communities to empowering communities.***

There is a strong need for economic growth in the post-COVID-19 visitor economy and, indeed, strong growth can be expected. Growing awareness of the negative impact of tourism, as well as a more general awareness of the urgency with which climate change needs to be addressed, means that public and private organisations in the tourism sector must take responsibility. As tourism returns following the pandemic, we need to build on the very best ideas and practices, reimagining tourism and destination development for the better.

**An important aspect here is the responsibility of destination marketers. More focus must be given on aligning the objectives of marketers and marketing campaigns to the needs and values of destinations and local communities. Achieving this requires clear positioning with regard to policy and development in tourism. It requires new tourism governance models, sustainable funding structures, innovative projects and technological solutions; it requires a shared responsibility and breaking**

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15. <http://www.conscious.travel/>

**of silos.**

There is a need for a clear direction, priority and responsibility across Nordic and national levels to set things in motion. The potential to react to a crisis, such as that seen throughout the COVID-19 pandemic, sets a strong precedent for concerted action.

### 3. A Nordic Network for sustainable and regenerative tourism

As evident from the participation of a large group of experts in the workshops run in this project, networks of high-level experts on sustainability and regenerative tourism already exist in all Nordic countries.

This valuable resource should be mobilised more effectively through strategic collaboration. An immediate benefit of such networking activities will be in providing a better general overview of projects, initiatives and innovation in the field of sustainability and regenerative tourism throughout the region. Increased networking activities will also provide opportunities for better co-ordination, learning and sharing of best practices, which will create opportunities for improved policy and project development at both the national and Nordic levels.

In order to activate the potential of this "latent" network of Nordic experts, efforts should be made to conceptualise, curate and execute a focused communications series with the aim of sharing solutions and ideas for sustainable and regenerative tourism and to rethink destination development. The series will feature a number of Zoom talks, interviews, workshops and digital roundtable discussions. The series will be adapted and distributed on social media through short film clips and possibly a podcast production. In addition to the benefits to Nordic co-operation, the initiative will increase the international visibility of sustainable tourism in the Nordics, with an emphasis on Nordic ideas and solutions along with the Nordic values of sharing and collaborating in the face of challenge.

### 4. A Meaningful Metrics Monitor

All the Nordic countries are very aware of the need for finding a useful reference point for measuring sustainability. The countries have much in common with regard to the experiences and destinations they offer, and it can therefore be expected that the countries have much to gain from sharing successful practices and knowledge.

Together, the Nordic countries have prioritised sustainability in their joint Vision 2030 for the Nordic region, and the countries share a common commitment to the UN Sustainability Goals and the Paris Agreement. Other frameworks, such as the ETC's Sustainable Tourism Indicators, should be regarded as a means to work towards these international goals and

agreements.

The countries all use the UNWTO definition of sustainable tourism as a point of departure. According to UNWTO sustainable tourism is:

**“Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.”<sup>16</sup>**

Yet the understanding, ambition and approach to sustainability varies substantially across Nordic countries and destinations. Often, it has been a struggle to identify meaningful metrics to monitor sustainability, and a clearer definition is needed of what it is we are monitoring and why we are monitoring it. Nonetheless, the Nordic countries look to each other for inspiration and collaboration when it comes to best practices in improving sustainability in travel and tourism.

On the one hand, there is a need for a practical framework against which the impact of tourism and travel can be measured in terms of statistical information. On the other hand, there is a clear awareness that sustainability in tourism sustainability is a highly complex and dynamic area and that metrics and methods must continuously reflect these changes to be meaningful. The questions of what are we measuring and why are we measuring it must continuously be under review. Collaboration on sharing meaningful metrics will contribute to a shared vision for the future of sustainability in Nordic tourism.

The European Travel Commission has developed a common framework for measuring sustainable tourism indicators. This is a framework that can provide a sound frame of reference for common Nordic metrics. The objective with ETC's Sustainable Tourism Indicators (STIs) is to provide an integrated approach that allows comparability of available data for effective monitoring and measurement purposes. While only 4 Nordic countries are currently taking part in the ETC's STIs project, most already measure some of the key indicators used in that framework. STI indicators can therefore be regarded as a useful common reference point for the Nordics and a practical framework for further development on tourism statistics. It is, however, important not to stop there, but to continuously evaluate the use and meaning of the metrics for sustainability in tourism and travel.

**There is a need to work continuously to develop a stronger, more consistent shared vision for the future of sustainability in Nordic tourism. To align that shared vision with the realities at the level of the industry and the destinations, there is a need for meaningful metrics to measure our progress on our way towards it. Sustainability in tourism is a highly complex and dynamic area, and the metrics and methods must continuously reflect these changes to be meaningful. The questions of what we are measuring and why we are measuring it must continuously be under review.**

## 5. Platform for sharing Best Practices

The importance of sharing best practices resonates throughout all the recommendations made here. The value in identifying and sharing best practices exists throughout all fields of policy and practice of sustainable and regenerative tourism and should be promoted in all collaboration. There are many opportunities for sharing best practices and many worthy projects to be shared. One idea that encompasses the general principle in communicating and sharing best practices can be found at [101.sustainableidas.com](https://101.sustainableidas.com)

The City of Göteborg, a global leader in destination sustainability, has developed this platform for sharing ideas from sustainable tourism destinations from around the world. The idea behind this platform should be extended and developed further, with a focus on Nordic sustainable destinations and with the participation of all the Nordic countries. Such a platform can be an inspiration to destination developers all over the world, but in particular, it will provide an arena for knowledge sharing and co-operation for destination developers and marketers throughout the Nordic region. An interesting perspective to this initiative would be to explore and share key determinants of change toward sustainability and regeneration. The platform also has the potential to add value to Nordic branding activities.

## 6. New disruptive technologies and business models for sustainability

Globally, tourism and travel are among the most innovative and disruptive economic sectors, with changing demographics, the emergence of new markets, digitalisation, new technologies and new business models.

At the same time, tourism faces complex challenges, many of which have to do with sustainability and environmental and social challenges. These challenges are central to the often-fragile economic viability and lack of competitiveness in the tourism industry. Individual enterprises in tourism and travel are often financially vulnerable, and the sector is plagued by a "digital divide", which means that only a part of the sector has been able to build up the necessary digital competence.

**As tourism stands at a crossroads where important decisions must be taken for recovery under conditions of great uncertainty, the one**

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16. UNWTO website; <https://www.unwto.org/sustainable-development>

certainty is that the industry will have to adapt to a changed reality though making disruptive changes. The need for initiatives to boost innovation, technological development and investment in sustainable tourism and travel across the Nordic region is clear and should be supported strategically.

There are great opportunities in applying innovation developed in other sectors to tourism. Indeed, innovation and technological development taking place in other sectors will continue to have disruptive effects within tourism. Special efforts should be put on supporting innovation, digitalisation and technological development as regards sustainable solutions in tourism.

# About this publication

## Monitoring the Sustainability of Tourism in the Nordics

Nord2021-033

ISBN 978-92-893-7035-6 PDF

ISBN 978-92-893-7036-3 ONLINE

<http://dx.doi.org/10.6027/nord2021-033>

This publication is available online in a web-accessible version at  
[pub.norden.org/nord2021-033](http://pub.norden.org/nord2021-033)

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Coverphoto: Harri Tarvainen, Business Finland

Layout: Louise Jeppesen

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Nordic co-operation is one of the world's most extensive forms of regional collaboration, involving Denmark, Finland, Iceland, Norway, Sweden, and the Faroe Islands, Greenland and Åland.

Nordic co-operation has firm traditions in politics, economics and culture and plays an important role in European and international forums. The Nordic community strives for a strong Nordic Region in a strong Europe.

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