



Strategic Roadmap towards 2030 for Sweden's Arctic Destination

2024.05

TOURISM STRATEGY • NORRBOTTEN COUNTY



Table of Contents

Preface	4	Strategic intervention area: Balance	22	Network economy – the visitor value chain.....	35
Introduction	5	The hospitality sector – a tool for sustainable development	22	The surrounding ecosystem.....	36
A new roadmap for the hospitality sector	6	Year-round income.....	23	Right people in the right place.....	37
Regenerative tourism and the ambition to		Visitor management – organising the unorganised.....	24	Relevant education.....	38
'build back better' as a new way of travelling.....	8	From ambiguity to clarity	24	Investments.....	39
What is Sweden's Arctic destination?	9	Strategic intervention area: Plan	26	Strategic intervention area: Attract	40
Hospitality sector vs tourism.....	10	Engaging with the outside world.....	26	The appeal of the place.....	40
Method and process	12	Planning for visitors.....	26	The shared destination trademark.....	41
Background.....	12	Facilitating running a business	27	Increase knowledge about Sweden's Arctic destination	42
Cluster analysis.....	12	Who gets to use the land?.....	27	The right target group	43
Evaluation of the present situation.....	13	Infrastructure – a crucial issue	28	The right message at the right time.....	44
Planning for the future.....	16	<i>Sustainable public transport for all</i>	28	An Arctic agenda for a more responsible destination	45
Target and vision	18	<i>Fossil-free travel</i>	29	<i>The responsible enabler</i>	46
Five strategic intervention areas	19	<i>Trails, national parks, nature reserves</i>	30	<i>The responsible company</i>	47
Strategic intervention area: Respect	20	<i>Digital infrastructure</i>	31	<i>The responsible traveller</i>	48
The chain of hospitality and being a good guest	20	Strategic intervention area: Innovate	32	Concluding remarks	49
In harmony with the local population.....	20	Business with the guest in focus.....	32	Summary	50
A part of Sápmi	21	Experience innovation and knowledge sharing.....	33	References	51
Traditional knowledge and customs.....	21	Catching the digital train	33		
Dialogue with stakeholders	21	A circular economy.....	34		

Thank you to all those who have contributed to the development of this strategic roadmap towards 2030.
The strategy has been prepared by Swedish Lapland Visitors Board. It was commissioned and funded by Region Norrbotten.



Swedish Lapland
Visitors Board

Swedish Lapland Visitors Board is the region of Norrbotten's official representative for the hospitality sector in Sweden's Arctic destination. It is a business-oriented collaborative platform supporting the industry's ambition to do business based on international and national demand for the destination's range of Arctic products and experiences. It also manages and markets the destination trademark Swedish Lapland.
www.swedishlaplandvisitorsboard.com



Region Norrbotten aims to achieve sustainable growth in our region. We do this on behalf of the Swedish government and the elected politicians in the Norrbotten region. The vision "Norrbotten will become Sweden's most welcoming and innovative region" sets the direction towards 2030. It shows how we will create an attractive region with long-term viability for those of us who already live and work here, and for those we hope will want to become a part of our future Norrbotten.
www.utvecklanorrbotten.se



“Tourism is a powerful force for progress and mutual understanding. But in order to deliver its full benefits, this force must be protected and nurtured. So let us all do more to harness the full potential of sustainable tourism. Because investing in sustainable tourism is investing in a better future for all.”

António Guterres, United Nations Secretary-General



In many respects, the hospitality sector holds the keys to a Norrbotten that is viable in the long run

The hospitality sector has injected new life into areas struggling with a loss of employment opportunities, reduced service, and outwards migration. The sector attracts women and young people – parts of the population that Norrbotten has had a hard time retaining in the past. The industry can quickly provide work for both young and new inhabitants in Norrbotten.

With the focused effort on the destination Swedish Lapland, the hospitality sector has developed into a new primary industry in Norrbotten, alongside heavy industry. It helps create jobs, diversifies the labour market, and generates tax income and growth, across industries. It builds natural bridges between urban, rural, and sparsely populated areas.

In a time when Norrbotten needs tens of thousands additional inhabitants to realise the green transition, the hospitality sector contributes to an attractive living environment and international in-migration. The path towards a new everyday life in Norrbotten might begin with a reservation at Treehotel, or a mountain trek in Abisko.

The hospitality sector is therefore an obvious priority in the regional development strategy as well as in Norrbotten's strategy for smart specialisation.

Region Norrbotten's objective is sustainable regional development. Everything we do, we do with a focus on sustainability, gender equality, general equality, and diversity. The hospitality sector is an important driving force and inspiration for this work.

Covid-19 heavily impacted everything related to travel, tourism, and restaurants. The hospitality sector is built on people coming together, and the pandemic years had serious consequences. Emergency measures were deployed to help otherwise viable companies to weather the storm and long-term work took a back seat.

Now that we are looking towards the future again, we are rebuilding the hospitality sector in a new way. We have learnt a great deal about monitoring what is happening in the world and making quick adjustments when necessary. We have also re-evaluated all dimensions of sustainability: social, economic, and environmental.

Swedish Lapland Visitors Board has on behalf of Region Norrbotten made a scenario analysis for the hospitality sector and worked in close dialogue with the sector to prioritise strategic intervention areas. The result is the bold and ambitious roadmap you are reading right now. It will hopefully contribute both to attractiveness and the objectives of Agenda 2030.

The strategy is based on a regenerative approach, and the aim is for the hospitality sector to have a positive impact on the destination, taking all dimensions of sustainability into account. The vision for Swedish Lapland; to be the world's most responsible Arctic destination, is underpinned by an integrated and innovative sustainable approach. This approach requires all stakeholders to take responsibility and contribute to a sustainable development. This way of thinking and working can serve as an example and a model for other industries and regions.

Region Norrbotten is responsible for regional development. This means we are mandated by the government to coordinate the work towards sustainable growth in Norrbotten. It is something we do together, and we would like everyone to contribute to the vision of Norrbotten becoming Sweden's most welcoming and innovative region. We believe that the hospitality sector and the ecosystem around it is key to achieving this vision.

Now we have our roadmap and it is time to begin our journey. It will take good collaboration and wise decisions to reach our goals. Region Norrbotten is ready to do its part together with municipalities, organisations, companies, locals, and guests.

Norrbotten is already a world-leading destination thanks to our unique culture, history, climate, and nature. It might take an outsider's perspective to raise awareness about the inherent value of everything we take for granted. To see ourselves, and the amazing place we live in.

Together we now share the task and the determination to make the most of the region's appeal, while also preserving it for Norrbotten's future residents and guests. It is a fine balance. This hospitality sector strategy – a roadmap towards 2030 – points the way.



Photo: Simon Eliasson

Janus Brandin,
Regional director of
development Region Norrbotten



A new and important journey for the best place in the world

What we do as individuals, just as what we do as industry and society, affects the place we live in and our everyday life. A responsible hospitality sector will always work for the good of the local community. Because it is also our home.

Striving for – and being – a responsible destination should be seen as a journey. We are in it together, because we love and want to develop this very corner of the world. With respect for the region, for those who shaped it and for coming generations, we take the next step. We live here now, but we were not the first ones here, and we will not be the last. The aim of this effort, for Sweden's Arctic destination, is clear: We are going to be top of the class!

In 2001, what would become Swedish Lapland Visitors Board was established. It is a business-oriented collaborative platform for cooperation between municipalities, aiming to strengthen the conditions for the hospitality sector and realise the national and international potential of our shared destination.

The list of our unique resources is long. Our rich Arctic cultural heritage, our traditions and knowledge passed from one generation to the next that we share with the travellers of the world, Sweden's most alpine environments, the large national rivers, the first and largest national parks, natural wonders, natural resources, and nature itself are all part of our appeal. We have university cities, company towns and village communities. From the mountains and along the river valleys all the way to the coast, we live an Arctic everyday life where the seasons are constantly changing. Our rural and urban life, between midnight sun and northern lights. Our home.

There is something exciting about an Arctic cultural landscape that has changed so little, during thousands of years. Visitors, as well as locals, can feel like they

are having a pristine experience, like no one has been there before. That says something about a sustainable way of life, of taking responsibility for this place as a resource for future generations, for their life quality and onsite possibilities.

The transition to a fossil-free life that is taking place in our traditional industries, helps place us on the world map. In every sense, those of us who live here are aware that all in all, this is something unique.

However, as this strategic roadmap is taking shape we do not turn a blind eye to the challenges of the present. Digitalisation and restructuring, linked to Sweden's adoption of the sustainable development goals in the 2030 Agenda, combined with the pandemic and other concerns, affect everything.

But please allow me to reflect on what the hospitality sector accomplished during the earlier strategy period – the results are significant.

Together we have established ourselves as an international destination in the Arctic. We did this through industry innovation and investments that have become new reasons to visit us; through our international business network of tour operators who package and sell; through daily articles published by international press; through advanced AI-technology enabling our companies to reach new markets and customers in new ways; through creating award-winning trademark communication in both our own and external media channels, reaching millions of travellers.

If there is one thing we have managed to create and communicate, it is a living, appealing Arctic everyday life – for those who want to visit, but also for us who live here.

During the previous strategy period we launched a widely talked-about social innovation, taking the step

from cooperation to interaction between all municipalities within the destination. A new local and regional promotional structure was built through the pioneering initiative Destination Capacity Building in Swedish Lapland. This project was followed up by Business Capacity Development in Swedish Lapland. The hospitality sector has seen amazing results and growth and is now an established primary industry. We can all agree that the tourism and hospitality industries develop our society. We are now once again in the process of shaping new parameters for this interaction.

An increased number of visitors is positive in many ways, but it also brings increased pressure that might create challenges. As a destination and industry, we must look further than what we can do for our visitors. The strategy also focuses on how visitors can contribute to the sustainable development of the entire region. A responsible visitor makes informed choices, and thereby contributes to local development opportunities.

Consequently, it is crucial for the destination to have a strategic roadmap that strengthens the conditions for, and enables, regenerative development, where the hospitality sector creates new business and work opportunities in a more gender-equal labour market. All this to ensure a growing number of attractive living environments to enhance villages, towns, and cities in the region. It will not only appeal to visitors from all over the world, but also give youth and people who have moved here beliefs in the future.

Together we will achieve the hospitality sector's challenging vision – to be the most responsible destination in the Arctic. Welcome aboard on this exciting journey!



Photo: Mats Engfors/Photographic

Annika Fredriksson,
CEO Swedish Lapland
Visitors Board



A new roadmap for the hospitality sector

What you are reading right now is the regional strategy for the hospitality sector in Norrbotten, developed by Swedish Lapland Visitors Board on behalf of Region Norrbotten.

The objective of the strategy is to draw up a bold and ambitious roadmap for the development of the hospitality sector aiming towards 2030. The strategic roadmap outlines a mutual and comprehensive direction for the tourism value chain, which consists of a complex network of actors – public, private, and non-profit – within the tourism ecosystem. This includes those acting within the region, as well as external collaborating commercial and public actors.

The roadmap might be further adjusted. This means that you should regard it as a living document that will be revisited, reviewed, and updated as a result of changes affecting travel to Sweden's Arctic destination.

The hospitality sector works on a consumer market where demand is governed by trends and individual drivers, and it constantly has to offer sustainable, relevant, and life-changing experiences.

But no man is an island, and neither is this strategy. The approach of the roadmap is anchored in the 2030 Agenda for Sustainable Development and GSTC's (Global Sustainable Tourism Council) systems for sustainable tourism development. It is based on, and takes into account, among other things:

- The EU *Transition Pathway for Tourism*
- The EU *European Tourism Agenda 2030*
- The *European Green Deal*, European Commission
- Sweden's *2030 Strategy for Sustainable Tourism and a Growing Hospitality sector*
- Norrbotten's *Regional Development Strategy 2030*

- Norrbotten's *Smart Specialisation Strategy*
- Sweden's *Strategy for the Arctic Region*
- *The Plan for Nordic Tourism Cooperation 2019–2023*, the Nordic Council of Ministers
- Norrbotten's local food strategy '*Nära Mat*'
- The scenario report *Futures for the Hospitality sector in Swedish Lapland – Scenarios for 2030*
- Reports and studies, see reference list.

TOGETHER WE ARE BOTH STRONGER AND WISER

The tourism ecosystem is vast and complex, incorporating global and interconnected value chains. Responsible tourism, with informed and responsible travellers and a responsible and competitive hospitality sector, contributes to employment and attractive places for visitors, population, and investments in the entire region of Norrbotten.

According to *Norrbotten's Regional Development Strategy 2030*, the starting point is building a viable region together, a region that can adapt quickly to changing circumstances and safeguard our unique conditions and possibilities.

European Tourism Agenda 2030 encourages the development of a forward-looking vision to take advantage of the many Europeans who want to change their way of travelling, making tourism more sustainable and responsible.

'WE' MIGHT ALSO BE YOU

When the strategy speaks of 'we' and 'us' it includes all those who work in and for the hospitality sector in Norrbotten. Those of us who work every day to give people the best possible experience here with us – on a regional and local level – but also all actors in the tourism ecosystem, creating possibilities for growth and building foundations.

So please embrace this strategic roadmap as something that involves you and your business, and as an opportunity to implement relevant parts of the various strategic intervention areas in your activities and your plan of action.

Contributing to the 2030 Agenda global sustainability goals is a key task for our generation, and an obligation towards future generations. We all need to join forces and turn vision into action.



Photo: Carl-Johan Utsi



Photo: Andy Anderson

GOALS FOR 2030

THE 2030 AGENDA:
End extreme poverty, reduce inequalities and inequities in the world, promote peace and justice and address the climate crisis.

EU:
Maintain Europe's position as a leading destination and at the same time maximise tourism and hospitality sector contributions to growth and employment; promote cooperation between EU countries, particularly by exchanging good practice.

SWEDEN:
Ensure that Sweden has strong appeal as a tourist destination and a tourism industry that is viable in the long term, contributing to sustainable growth and increased employment in the entire country.

NORRBOTTEN'S SMART SPECIALISATION STRATEGY:
Secure sustainable growth to guarantee competitiveness as one of the most attractive regions in the country.

THE DESTINATION:
Make it easy for responsible travellers to visit our Arctic destination and for them to make sustainable choices once they are here, actively contributing to sustainable local development.



Regenerative tourism and the ambition to 'build back better' as a new way of travelling

Visitors in this region contribute to many values, but they also have an impact on the destination. This impact varies from place to place but could for example be how it affects the landscape and the ecosystem's wildlife and nature. House prices and accommodation prices might also increase on attractive locations.

WHAT IS REGENERATIVE TOURISM?

The term refers to a sustainable way of travelling and discovering new places. The main goal is for visitors to have a positive effect on the destination, which means leaving it in better shape than it was when they arrived. This is not a new idea, but it has been revisited with the growth of the hospitality sector.

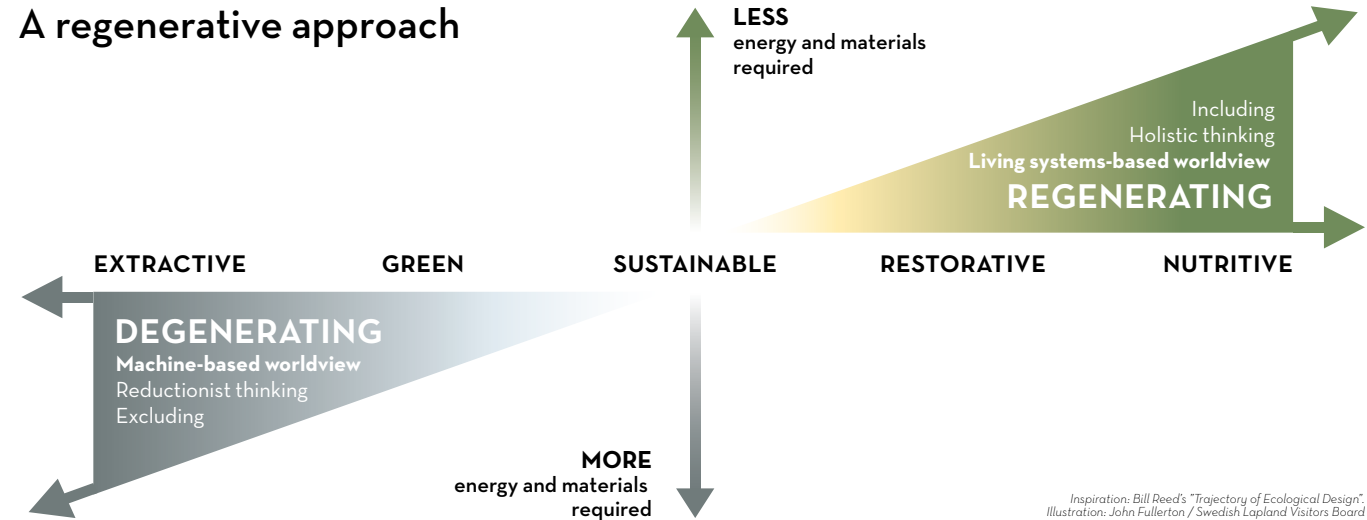
Regeneration means to actively revitalise and improve – to regenerate – the destination. This is expected to have a positive effect on local communities.

REGENERATIVE – THE NEXT LEVEL BEYOND SUSTAINABILITY

The regenerative approach changes traditional business models and the view of social progress. The idea is to move from unconditional growth to a more qualitative development, contributing to the health and wellbeing of humans and ecosystems. It also improves local economies and preserves local culture and biodiversity, while offering memorable and life-changing experiences. Destination development and local development go hand in hand.

All stakeholders in the tourism value chain and ecosystem – travellers, hospitality sector and communities – share a responsibility to preserve local assets and enable regenerative development.

A regenerative approach



Inspiration: Bill Reed's "Trajectory of Ecological Design", Illustration: John Fullerton / Swedish Lapland Visitors Board

UN REGENERATIVE PRINCIPLES

According to UN, tourism, when properly managed, can contribute to all sustainable development goals in the 2030 Agenda. UN has also developed a set of regenerative tourism principles for a tourism based on traditional knowledge, namely the following:

- **Holistic understanding and living-systems approach:** *The understanding that everything is interconnected and that the interactions between every stakeholder in the tourism value chain impact the entire ecosystem.*
- **Collaborative:** *Encourage and promote collaboration between a wide range of stakeholders from government to the private sector, the non-profit sector, and local communities. This is different from the competitive view governing the present economic system.*
- **Diverse by nature:** *Diversity in sources of income helps reduce dependence on a one-sided income within the tourism ecosystem and in the community.*

Diversifying between various segments – national and international visitors, leisure, and business travel – also helps mitigate economic and geopolitical risk and improves resilience.

- **Inclusive and equitable:** *Local communities being involved and cooperating with hospitality sector businesses can provide resources and support to economically vulnerable people, asylum seekers, and refugees.*
- **Transformational and inspirational:** *Personal and genuine experiences that highlight what is unique about each place, and involve local cultural heritage, traditions, gastronomy, landmarks – are life changing.*
- **Environmentally responsible:** *Preservation of natural resources, safeguarding biodiversity, protection of fragile landscapes and wildlife.*
- **Cultural stewardship:** *Protection of local cultural heritage and traditions and safeguarding local people as specialists looking after the local biodiversity, thanks to knowledge passed from generation to generation.*

Features of regenerative tourism compared to normal and sustainable tourism.



What is Sweden's Arctic destination?

The story about a place is a combination of its geographical location and values associated with it. Identity and knowledge are built on the uniqueness of a place, but a place is also part of something greater. To be able to develop and reach our goals, we have to look at the bigger picture: the world around us.

Sweden's Arctic destination is part of Sweden as a country. This provides a stepping stone to the global arena thanks to Sweden's good reputation when it comes to sustainability, equality and democracy, well-known brands, prestigious research environments, and cutting-edge industries. Sweden's image is characterised by progressivity, a high standard of living, and social justice.

Sweden as a destination thinks new and differently. We are in the beginning of a new era, where travel involves looking at the world afresh and creating lasting values. Sweden's Arctic destination works closely other regions in the country, as well as Visit Sweden.

The Arctic part of our northern destination tells a story of a unique environment and climate. It has a history filled with traditions and a culture in the shape of a multi-cultural melting pot. Sweden's indigenous people – the Sami – have lived here since ancient times, in Sápmi, a borderless region stretching from the northernmost parts of Norway, Sweden and Finland all the way to the Kola peninsula in Russia. The Torne Valley, by the Torne River, is the origin of Tornedalians, Lantalaïset and Kvens. They all have their own culture and a proliferation of craft, building and food traditions, and Meänkieli as a minority language.

Sweden's Arctic destination is the only region that borders two countries. Historically this gave rise to a multi-cultural exchange between East and West. Nowadays, we call this region Arctic Europe. It is still an important area geopolitically speaking, where Norrbotten is positioned for sustainable Arctic communities with world-class innovations in the areas of academic institutions, industry, and the public sector.

We are also part of the Nordic region, which is essentially defined as a unit by the rest of the world. The image of the area is mainly positive, thanks to our solutions to economic and political challenges. People talk about the Nordic model, and it is part of every nation's own model. Transparency and a belief in everyone's right to express their opinions, a trust in each other and in our leaders is something we have in common, lending an advantage to the trademark of each country. Sustainability and a focus on creativity and innovation are other shared traits. It is an image to nurture, and an image that Sweden's Arctic destination significantly contributes to. According to the EU Social Progress Index, the region is one of Europe's most socially progressive. The living conditions here are among the best in the world.

The Arctic part of Sweden, our home, is part of the global fabric – and at the same time, every place has its own story to tell.

Our shared promise to visitors is:
Welcome to share our Arctic lifestyle.





Hospitality sector vs tourism

THE HOSPITALITY SECTOR is an umbrella term for several sectors selling service to visitors – tourist spending. In short: everything visitors consume. Such as staying, travelling, eating, doing, and shopping. This means that every actor selling anything to visitors is defined as part of the hospitality sector.

Business capacity and skills must be strengthened to enhance the hospitality sector. This takes specialist knowledge of visitors' expectations (product development), how to reach visitors (market development) and businesses being run in a professional manner (business development).

TOURISM, people's need to visit other places for business or pleasure, is the raw material of the hospitality sector: people travelling and consuming what the hospitality sector produces. It is what minerals are to the mining industry.

According to UNWTO, UN's World Tourism Organisation, tourism includes activities when we travel to and stay in places outside our usual environment for less than one year for leisure, business, and other purposes.

There are many different types of tourism. Leisure is one example: tourism involving travelling for pleasure – a holiday, visiting friends or family, or practising a hobby.

Business travel is travelling for work, for example in the MICE segment: Meeting, Incentive Travel, Conferences and Events. Industrial development and other expertise related to a specific place creates another kind of tourism: in-depth study visits. Visitors meet with specialists working in a cutting-edge industry to gain first-class information and a behind-the-scenes experience.

Tourism development is all about what the place wants to be and offer – including attitudes and societal climate. Visitors must be able to travel to and within the destination, and this requires strategic work by several different stakeholders. An attractive destination is beneficial to all businesses, organisations, and communities.

The hospitality sector produces services and products consumed by visitors. This creates employment and an equal labour market. It also creates more service-producing business that in turn are beneficial to residents, a living countryside, and attractive living environments.

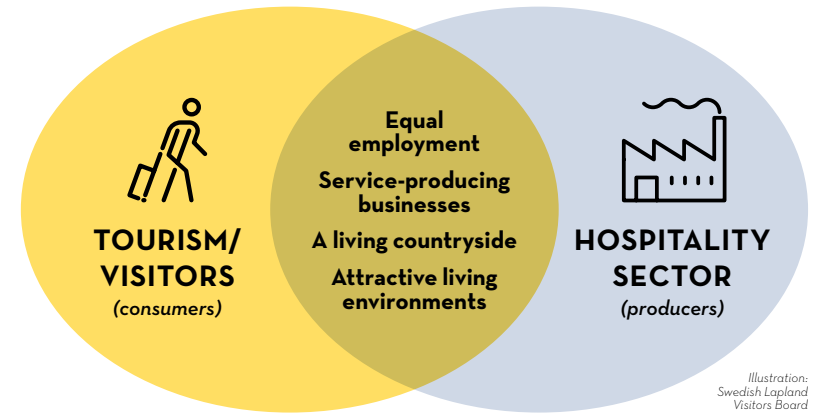


Illustration: Swedish Lapland Visitors Board

The hospitality sector is a network economy incorporating the activities of twelve different sectors/product groups. The hospitality economy is divided into five segments:

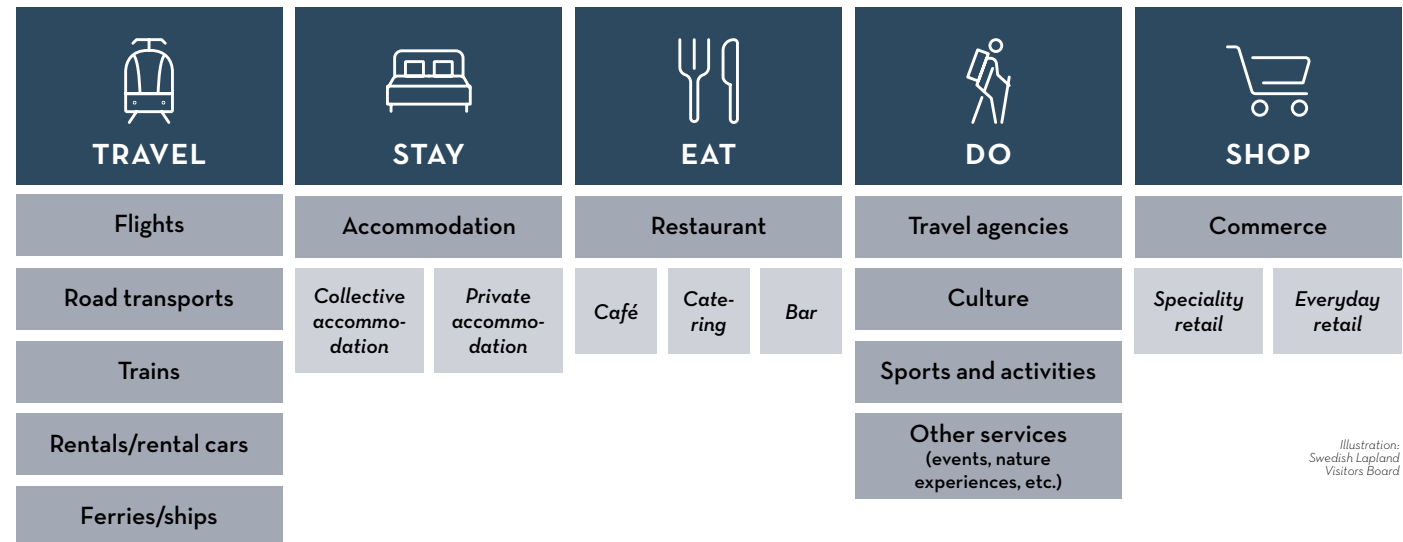


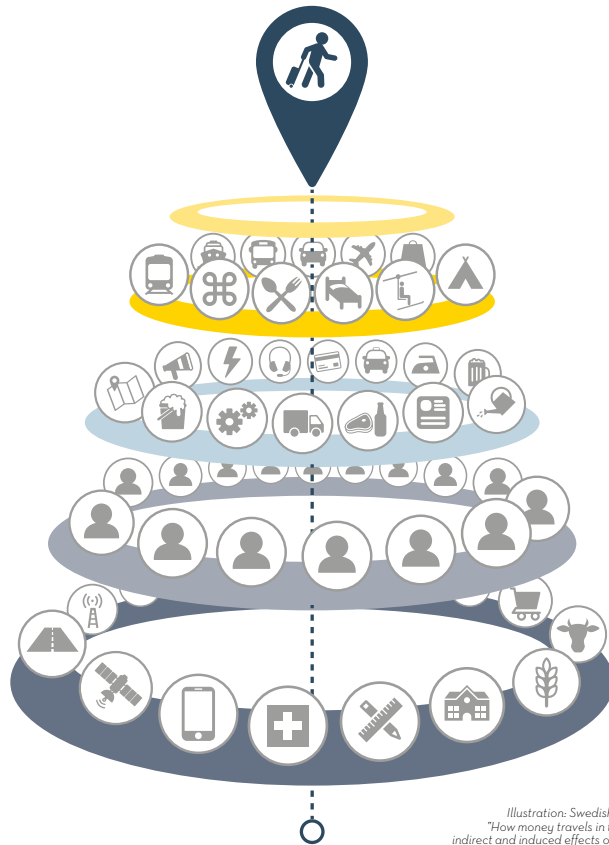
Illustration: Swedish Lapland Visitors Board



THE EFFECTS OF THE HOSPITALITY ECONOMY

The World Travel & Tourism Council, WTTC, makes a multi-level calculation according to the model below. It shows how visitor consumption is distributed far beyond the direct purchases made – direct, indirect, and collateral effects – and the general economic and socio-economic impact of tourism.

In Norway, the model showed that as many as 350,000 job opportunities were associated with tourism in 2018. Sweden lacks this kind of national statistics, but the Norwegian example indicates the values visitors contribute to countries, regions, and municipalities.



TOURISM
- the visitors - has an economic trickle-down effect on the community as a whole.

DIRECT - Visitors purchasing products in the categories stay, eat, do, shop and travel is the hospitality sector's value chain.

INDIRECT - Companies in the hospitality sector make their purchases from the indirect value chain of products and services outside of tourism.

BOTH LEVELS CREATE EMPLOYMENT
- salaries, fees, profits, taxes, etc.

CONTRIBUTING FINANCIALLY
- to welfare in the form of community infrastructure, technology, transports, education, etc.

Illustration: Swedish Lapland Visitors Board, redesign of "How money travels in the tourist industry. About the direct, indirect and induced effects of visitor consumption." (WTTC 2017)

BUSINESS MODELS CHANGE IN TIMES OF TRANSITION

The model also shows how closely linked the hospitality sector is to community development. Its services give inhabitants added value and provide them with an attractive service supply, but it also offers secondary services in other parts of the local economy and society.

Further radical innovations and changes will meet travellers' new needs and consumption patterns. This will challenge the hospitality sector's ability to manage innovation and business development. Some examples below:

- The booking service AirBnB has increased accommodation supply and affected many destinations. Access to private cottages and apartments both challenges and supplements commercial accommodation facilities.
- Increased interest in healthy food and drink creates new concepts in the restaurant business and new markets for local food producers.
- Innovations in sports equipment, such as e-bikes and special skis, also change travel behaviour.
- The 'digital nomad' trend creates opportunities with new guest categories and an increased booking rate during traditional low season.
- Responsible and conscious tourists ask for locally produced service and products, which drives local business development.



Method and process

Background

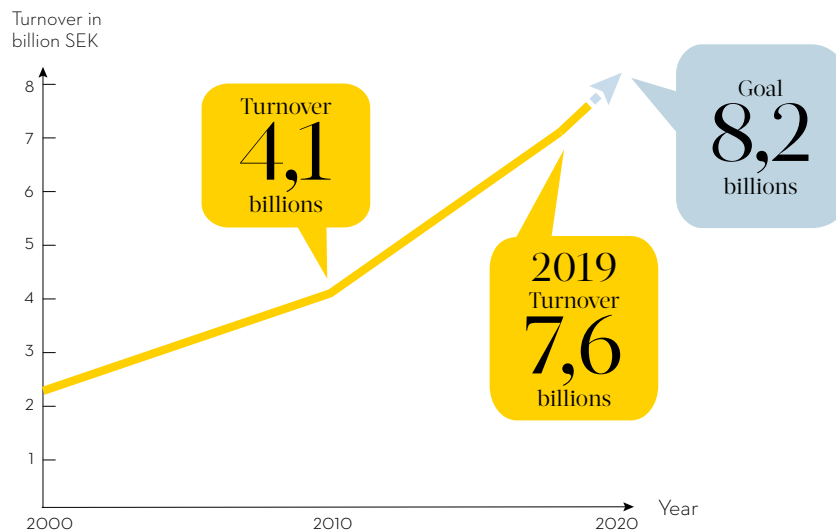
The work on the *2030 Hospitality sector Strategy for Norrbotten* began in 2019, with the previous 2020 strategy as a starting point, but was put on hold as the pandemic required all resources to be directed to supporting the industry through the crisis.

The first starting point was an evaluation of the present situation in Swedish Lapland, mapping the hospitality sector's development, structure, willingness to invest, and what the companies regard as shared key issues related to development.

The second starting point was the present situation with regards to the previous national strategy goal to double the industry turnover 2010–2020. The

destination Swedish Lapland increased its turnover from 4.1 billion to 7.6 billion in 2019, almost the double.

The approach of the *2030 Hospitality sector Strategy for Norrbotten* was decided before a national strategy had been launched and therefore a significant part of it was prepared independently of national goals and strategies – albeit with connections to European and global frameworks. In autumn 2021, the *2030 Strategy for Sustainable Tourism and a Growing Hospitality sector* was launched, indicating national goals, and intervention areas from this national strategy have been considered during the process.



Swedish Lapland set the goal to double the turnover within the tourist industry between 2010–2020.

Cluster analysis

In 2020, Region Norrbotten carried out a comprehensive cluster analysis of several sectors. Using an extensive amount of collected data as a basis, an analysis was also made of the hospitality sector's connections, strengths (lack of cluster gaps), and weaknesses (existing cluster gaps). Clusters are crucial as they contribute to increased cooperation, enhanced collaboration, and a higher level of innovation within an industry. Norrbotten constitutes nearly a quarter of Sweden's total area and is characterised by sparsely inhabited areas, small local markets, and a low rate of people in the working age population. As a result, the structural obstacles are greater than in other parts of the country – distances make it more difficult to establish and maintain viable cooperation. A cluster can help decrease perceived distance and has a better chance of survival once projects and other measures come to an end.

The cluster analysis revealed an intricate network within the destination Swedish Lapland. There is a clear dependency on authorities and the regional organisation Swedish Lapland Visitors Board, but also local member organisations and local export-oriented hospitality sector businesses with several linked subcontractors. The conclusion is that there is an obvious need to collaborate within the industry: businesses need to work together to package offers, implement cooperative market actions, and make the industry's voice heard.

The regional promoter organisation plays an important role as a cohesive force for the industry, and the contact with Swedish Lapland Visitors Board is often crucial to reach the international market. Based on the result, it is important to reflect on the



The Cluster analysis is summarised here and can be read in its entirety (in Swedish) at swedishlapland-visitorsboard.com.



cluster gaps that might limit the industry’s future growth. One example is that there is a significant gap between the industry and private investors and the support system for innovations. Even if there is no gap between authorities and hospitality sector businesses at first glance, additional interviews show that the quality of contacts is not optimal. Many entrepreneurs in the hospitality sector stated that local and regional authorities lack an understanding of the industry’s requirements, and that they feel side-lined compared to other industries as a result.

Evaluation of the present situation

In the beginning of 2019, Swedish Lapland Visitors Board commissioned the consultancy firm WSP Advisory to carry out an evaluation of the present situation for Swedish Lapland. The evaluation was based on a survey and in-depth interviews with two focus groups consisting of businesses active in the hospitality sector. The aim was to map the industry, pinpoint obstacles related to development, and identify key sustainability issues for the industry. The survey was followed up in 2021 with Needs and Future Prospects of Businesses in Swedish Lapland, with supplementary questions about the impact of the pandemic. In 2023 the survey was conducted once again to obtain indicators on the present situation as well as business-critical challenges and views to the future.



The result is summarised here and can be read in its entirety (in Swedish) at swedishlaplandvisitorsboard.com.

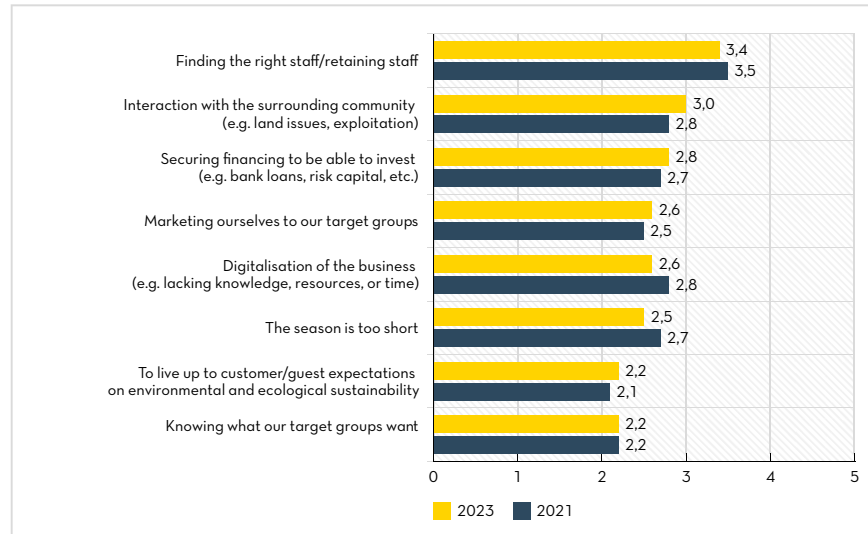


Illustration: Swedish Lapland Visitors Board / WSP

< With regards to your business, to what extent do you view the below as an obstacle to your development? (1 = “very weak” and 5 = “very strong”)

In terms of business activities, the majority of those asked have indicated “supply of skill” as the main obstacle - the challenge of finding the right staff and retaining staff. This is followed by “interaction with the surrounding community” and “securing financing to be able to invest”.

Further obstacles related to insufficient marketing skills and marketing aimed at target groups, and digitalisation are mentioned. Several also point out a lack of support from municipalities, and state that the hospitality sector, reindeer husbandry, and nature conservation interests are at odds with industrialisation and therefore discouraged locally.

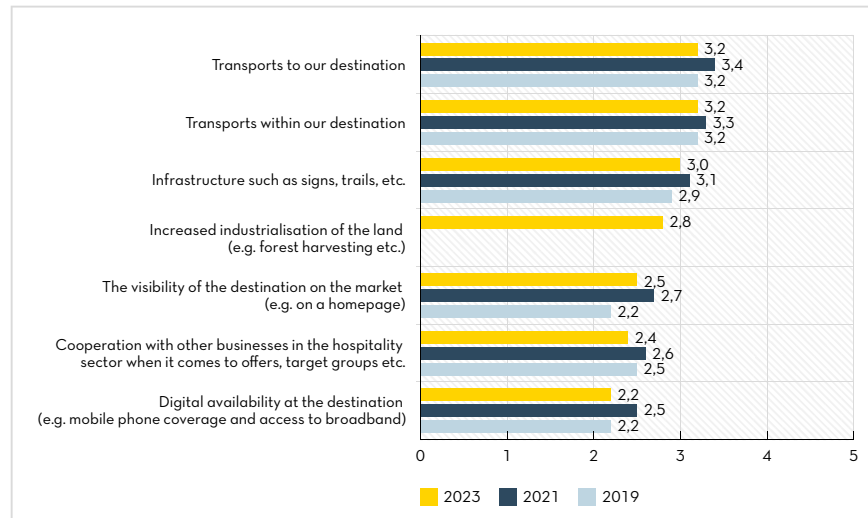


Illustration: Swedish Lapland Visitors Board / WSP

< With regards to issues linked to the destination - to what extent do you feel that any of the below is an obstacle for your business? (1 = “very weak” and 5 = “very strong”)

In the survey, obstacles for development are divided into obstacles within the activity itself and obstacles linked to the destination. In 2019, 2021 and 2023, participating businesses stated that the biggest obstacle linked to the destination was “transports to and within the destination”. The infrastructure challenge is divided at best: some feel it is imperative to invest in direct flights to the destination, while others consider it more important to develop other options, such as the train experience, providing an obvious, sustainable transport alternative. An “increased industrialisation of the land, e.g. forest harvesting, wind energy development, mining and quarrying” is a recently identified obstacle to the continuous development of businesses.



THE AFTERMATH OF THE PANDEMIC

The pandemic hit the hospitality sector hard, also in Sweden's Arctic destination. In a remote destination with a high rate of international visitors and a small population, this vulnerability became apparent during a global crisis. During the first year of the pandemic there was even a lack of national visitors, but this changed in 2021, when the number of Swedish visitors was unprecedented during the summer months. After studying and comparing mobile data from mobile network operator Telia for the summer months before and after the pandemic, it became clear that it is first and foremost people from Norrbotten who travel in their own region, followed by neighbouring regions. The number of visitors from the southern parts of the country dropped during the pandemic years, and the Swedish and regional travellers did not compensate for the international visitors who did not come.

In the company survey from 2021, a larger number of businesses stated that they had made a loss or broke even compared to 2019. Most gave the pandemic as a reason – with fewer guests/customers than planned. Respondents wrote in reply to the open-ended questions that the pandemic had affected the business both positively and negatively, but the absolute majority said it had had a negative effect.

External factors such as war, the global economy, and climate change continue to have an impact.

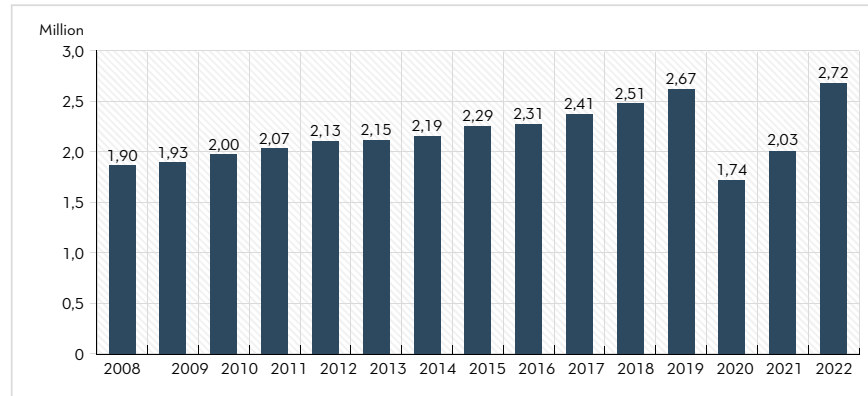


Illustration: Swedish Lapland Visitors Board / SCB

< Guest nights Norrbotten region 2008-2022.

Accommodation statistics from Statistics Sweden show that 2022 exceeded the previous record year 2019 in terms of registered guest nights in the categories: hotels, cabins, hostels and camping. The number of visitors to the region has been growing steadily from 2008 until the pandemic hit in 2020.

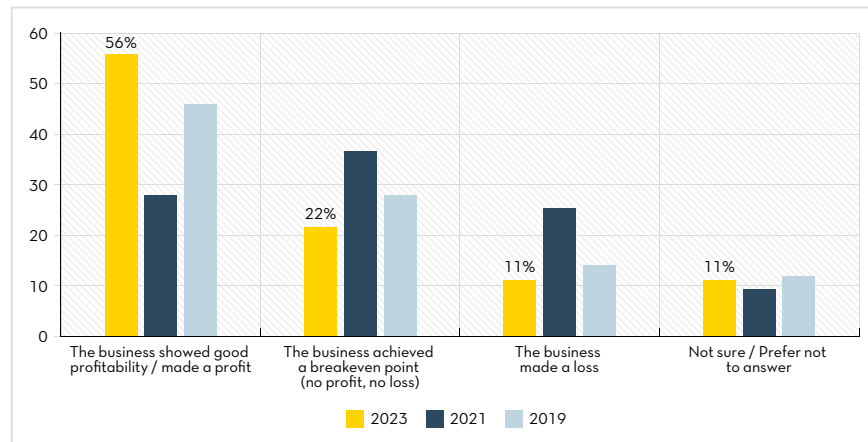


Illustration: Swedish Lapland Visitors Board / WSP

< Business development - post-pandemic recovery.

When asked about the latest financial year, an increased number of businesses – slightly over half – stated that “the company showed good profitability/made a profit” and the number of businesses reporting a loss decreased.

In 2023, one out of four stated that the pandemic still affected their activities. In 2021 four out of five stated that the pandemic had affected them significantly.



A STRONG BELIEF IN THE FUTURE

According to the follow-up in 2023, there is still a strong belief in the future within the industry. Compared to 2021, a larger portion of the respondents have moved towards level three on a five-point scale. Despite foreseeing robust growth going forward, fewer (compared to 2021) plan to employ staff in the coming year.

Limited travel infrastructure, difficulties finding new staff with the right skills, and concerns about the industrialisation of nearby land are some of the factors making it difficult to plan ahead.

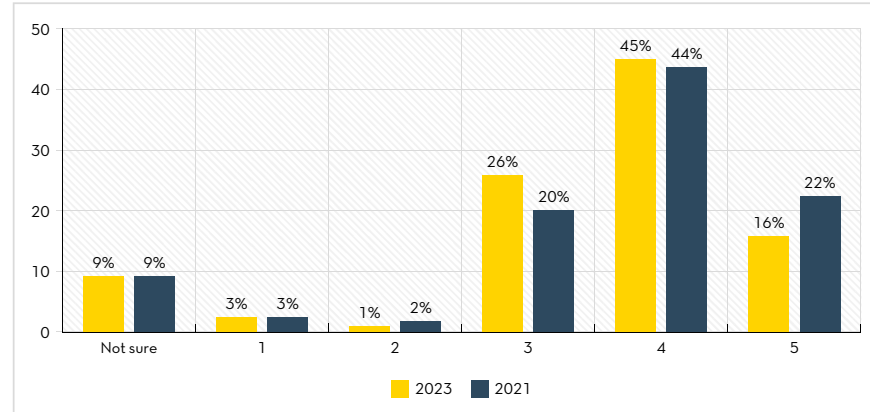


Illustration: Swedish Lapland Visitors Board / WSP

< **Looking two years ahead: How do you see your business developing?**
(1 = "very weak" and 5 = "very strong")

Nearly two thirds of businesses believe in strong growth for the next two years. The accommodation and transport sectors are the most positive. There are, however, fewer businesses that view their own development as "strong" or "very strong" compared to 2021.

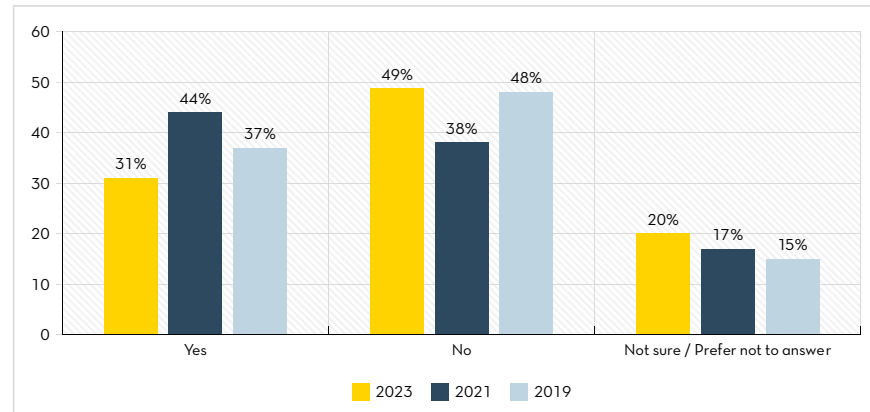


Illustration: Swedish Lapland Visitors Board / WSP

< **Do you plan to employ staff in the coming year?**

31% of the respondents plan to hire during the year, a lower percentage than previous years. The accommodation and transport sectors show the highest percentage, where more than 39% and 43% respectively state that they plan to take on staff during the year to come.



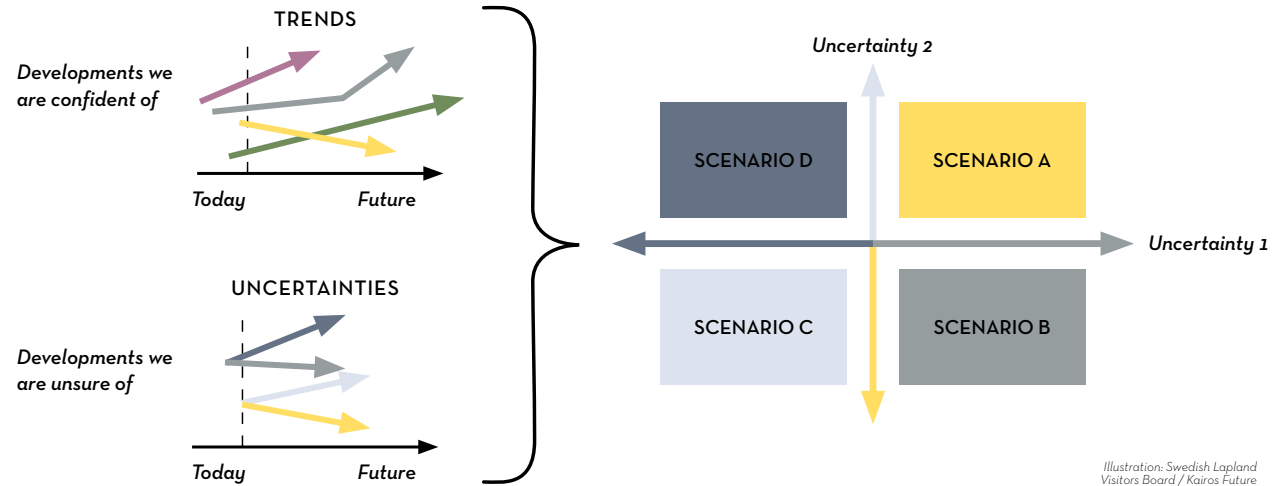
Planning for the future

It is difficult to predict the future and to be proactive. Both the past and the present hold clues that can help us face the future as efficiently as possible. At the start of the strategy process it was decided that the strategy should be preceded by a scenario analysis. The aim of the strategy was to draw up a roadmap towards 2030, and the scenarios would provide different paths to take into consideration when discussing challenges and future-proofing strategic action.

First, external factors that might affect the answers to the question “What possible future scenarios are there for the hospitality sector in Swedish Lapland up to 2030?” were collected and analysed. The analysis was documented and separated into trends and uncertainties. The main uncertainties were polarised to create a scenario cross, where the collected material provided a base for four different scenarios.

Strategists, business developers, and communicators were involved in the process. Workshops were held with representatives from all municipalities as well as internal workshops, data gathering, trend monitoring and interviews. The work was carried out by research company Kairos Future in cooperation with Swedish Lapland Visitors Board, and the analysis of external factors should be understood as a broad outline of what affects the development of the hospitality sector in Norrbotten towards 2030.

By simulating how the industry would develop in each scenario, Swedish Lapland Visitors Board has made an analysis of how the industry should act to ensure sustainable development regardless of scenario. Actions that feature in all scenarios then



Scenarios are based on trends and uncertainties, where trends describe what all scenarios have in common while uncertainties distinguish them from each other.

Illustration: Swedish Lapland Visitors Board / Kairos Future

form a base for the strategic intervention areas that are outlined in this strategy.

No scenario is more likely or more desirable than the other, and the future is more likely to look like a combination of scenarios rather than just the one. The purpose is to show the range of possible developmental paths and different futures.



The scenario report “Futures for the Hospitality sector in Swedish Lapland – Scenarios for 2030” can be read (in Swedish) at swedishlaplandvisitorsboard.com.



FOUR FUTURE SCENARIOS FOR 2030

Below is a summary of the four scenarios we have gone forward with to build upon, based on the scenario report *Futures for the Hospitality sector in Swedish Lapland – Scenarios for 2030*, produced by Kairos Future in the beginning of the strategy process.

Scenario Great Rapids

'Great Rapids' is experiencing significant industrial development and tourism is expanding both in terms of supply and size. The industrial investments made in the beginning of the 2020s were successful and more actors have been attracted to the region due to the discovery of new deposits of rare-earth metals alongside the establishment of additional data processing centres.

At the same time, tourism has seen a significant surge. The unique nature and experiences in Swedish Lapland were exactly what many were looking for following the pandemic years, and tourists started to arrive in a steady stream.

The hospitality sector's rapid development helps attract new inhabitants, as there are more job opportunities for family members. Thanks to people moving in - and relatively good salaries - municipal finances are doing fairly well and more investments are made in the public sector.

This scenario is characterised by sound cooperation between the industry and the hospitality sector. There is a considerable lead in terms of a circular economy and cross-fertilisation between industry, hospitality sector and cultural sectors.

The stumbling block has been the need for renewable electricity. There is still resistance to wind farms, for example, said to disturb fauna, reindeer husbandry and outdoor recreation. Nature and forests are under heavy pressure and access to virgin nature has decreased as more facilities - both tourism-related and industrial - are established, and there is a problem with over-tourism in many places where no restrictions can be placed on the right of public access.

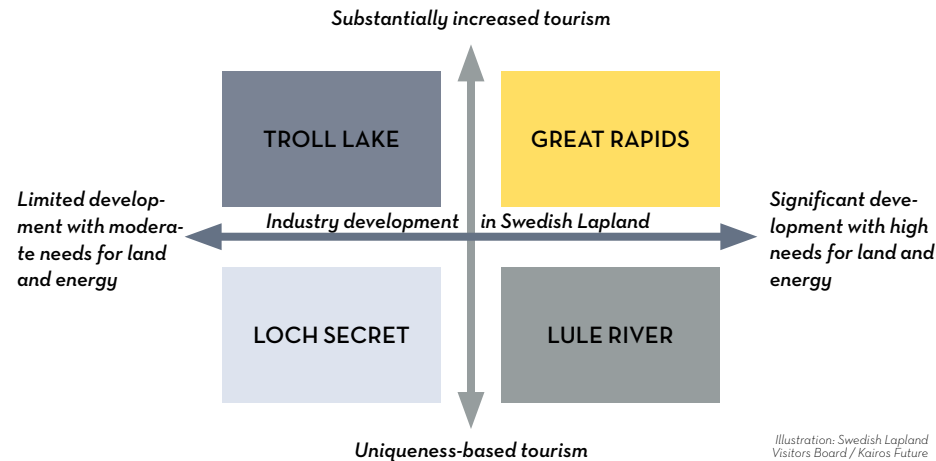


Illustration of the scenario cross and four future scenarios for 2030.

Scenario Lule River

There is substantial industrial development going on in 'Lule River', but tourism focuses on a narrow, high-paying segment that wants to experience the unique Arctic nature and culture.

In Swedish Lapland, new establishments such as Northvolt, H2GS, Hybrit, and the mining industry dominate. Facebook has extended its server farm and more data centres have been established as access to green energy has increased, and because of the cold climate.

In parallel, the tourism industry has developed special, unique experiences catering to a middle class with purchasing power. These experiences are supplied by several smaller companies and lifestyle entrepreneurs.

Nevertheless, resource extraction taxes and fees benefit the state and not the local economy. The long-standing conflict on where natural resources are found and where the profit ends up remains. Despite agreements on land use with local entrepreneurs in the hospitality sector, there are several ongoing conflicts between tourism and large-scale industries on who has the rights to nature.

Scenario Loch Secret

In 'Loch Secret', industrial development stalls and becomes more limited. Tourism focuses on being close to nature and offering simple experiences.

Investments that were promised a decade ago, have failed to come to fruition. The aftermath of the pandemic has been worse than feared and it has been difficult to open up society and get the wheels turning. Some new establishments, such as Northvolt and Facebook, are still around but the big, new ideas did not really catch on when technology proved difficult to master.

The hospitality sector mainly consists of several smaller actors appealing to a target segment with purchase power looking for unique, tailor-made, and luxurious experiences. Swedish Lapland is seen as a bucket-list destination.

Public finances are under pressure due to an aging population and limited inward migration, which results in difficulties in making investments in infrastructure that would improve availability and increase the number of visitors. The question everyone is asking is where responsibility lies for leading the region into the future.

Scenario Troll Lake

In 'Troll Lake' tourism gets going through comprehensive investments and plenty of staycations, while industrial investments have yet to be successful.

The great ideas that characterised the industry in the early 2020s have not gained much traction. Dreams of new investments into the metal and mining industries were never fulfilled, just like the proposed steelworks project 'Stålverk 80' in the 1980s.

Instead, a new primary industry has emerged: the hospitality sector. Once the vaccine had been distributed globally, tourists from all corners of the world came to visit Swedish Lapland. The development has mainly been driven by large actors, often backed by international capital.

There are plenty of jobs available, including entry-level jobs, and more and more people choose to live in the region. Big companies who can offer everything to everyone dominate the hospitality sector. Small-scale businesses are still around but find competition difficult to navigate; several businesses have already been acquired. Charter companies operate in the airspace above northern Sweden; visitors spend more and more money in the region which means increased tax revenue. Foreign investors have scattered money generously and it has been a wild journey filled with fortune seekers.

The right of public access can now be cancelled locally, and visitors have to pay to access places such as national parks. Hospitality sector representatives are actively working on policies and frameworks to ensure tourism grows in a sustainable manner. Nevertheless, there are conflicts between groups of residents and the large tourism companies. The feeling is that what is real and genuine, which has always been a characteristic of Swedish Lapland, is under threat and there is fear that nature will be ruined.



Target and vision

The hospitality sector's target and vision are in line with the global sustainable development goals in the 2030 Agenda and the EU's European Tourism Agenda 2030.

The 2030 Agenda is an action plan with goals for transitioning to a sustainable society for people, planet, and prosperity. The 2030 Agenda features milestones and targets that are integrated and indivisible, incorporating all three dimensions of sustainable development: economic, social, and environmental.

The European Tourism Agenda 2030 is a shared compass for relevant stakeholders in the member states in the joint effort towards a greener, more digital, and more resilient tourism ecosystem.

Region Norrbotten's sustainability work is based on the 2030 Agenda and defined by the level of contribution that can be made towards reaching the targets. The region calls it an contributing and accountable approach; others might call it synergy effects and conflicting objectives.

The 2030 target is: *"It is easy for responsible travellers to visit our Arctic destination, to make sustainable choices once they are here, and actively contribute to sustainable local development."*

The ambition is to help Norrbotten achieve the global targets, and this is why the regional hospitality sector has a long-term, bold vision: *The world's most responsible Arctic destination.*

The hospitality sector in the region assumes responsibility and works actively for a sustainable transition. Based on our target and long-term vision, we will implement a number of strategic interventions in different areas leading up to 2030.



Photo: Viggo Lundberg



Illustration: Swedish Lapland Visitors Board



Five strategic intervention areas

Considering scenario analysis, surveys, the 2030 Agenda, international, national and regional strategies, a number of intervention areas have been identified and selected for further action towards 2030.

These intervention areas will be important to the industry no matter what the future holds. But even so, the roadmap is not carved in stone – it will be revisited every two years. The future scenarios will be updated in 2025, to allow for potential adjustment of the course.

The strategic roadmap has been prepared considering the key challenges towards 2030, as identified by the industry. Five intervention areas have been defined – focus areas based on developmental needs and possibilities, as well as other action plans and development strategies in the region.

It should be noted that no intervention area is a separate unit; they are very much intertwined and interdependent.

Businesses and social players work simultaneously, driving parallel processes. Within the intervention areas – Respect, Balance, Plan, Innovate, Attract – there is a need for a common, comprehensive approach and increased interaction between the stakeholders in the tourism ecosystem.



Illustration: Swedish Lapland Visitors Board



Strategic intervention area: *Respect*

To be a responsible destination all stakeholders and industries must appreciate each other's roles and respect individual challenges and missions, as well as local circumstances.

The chain of hospitality and being a good guest

Hosting that makes visitors feel welcome is an important part of the journey towards becoming a world-class responsible destination. Hosting and personal treatment are important factors, affecting the desire to stay, the willingness to return and how visitors recount their stay and recommend the journey to others.

As well as we work with the tourism value chain in the hospitality sector, we also need to consider the hosting chain. Good hosting will support the flow of tourists, which is beneficial for both visitors and other hosts in the chain of hospitality. Good hosting can be sharing knowledge about the destination, offering information about other points of interest than just your own, and taking a curious interest in visitors to be able to offer added value.

Hosting needs to be both personal and digital. Working in a structured manner with values and developing different types of hosting, we will link destinations, hospitality sector businesses and residents in terms of service, treatment, quality, friendship, and hospitality.

A responsible traveller is keen to make the right, informed choices when travelling. Part of responsible hosting is to help visitors by showcasing good examples and desirable action.

In harmony with the local population

Local populations are an important part of a growing hospitality sector that often involves activities in the resident's natural and living environment. A mutual understanding of needs on both sides is desirable, as friction between industry and residents can have a negative impact. Challenges that arise because of increased tourism should not lead to residents feeling a pressure to adapt.

Hence, it is important to find consensus and involve residents in development efforts to shape a mutual definition of why the hospitality sector matters. How can tourism help contribute to the development of the place? These targets will vary depending on the location.

It takes a structured approach to involve residents and make them feel part of, and proud of, the development of the destination. This could include community planning as well as the development of new products and services, and marketing. Residents are often the destination's best ambassadors and incredibly important to hosting. Their role needs to be made visible.

Good examples can be found in community planning, where methods are already in place. To involve citizens, councils could investigate how satisfied residents are by asking questions about tourism. Systematically involving residents when developing the hospitality sector means that any conflict of interest that might occur can be overcome. The residents will define when tourism becomes a problem.



Photo: Pernilla Ahlsén



A part of Sápmi

Sweden's Arctic destination is a part of Sápmi, the traditional settlement area of Sweden's indigenous population: the Sami. Essentially, the entire destination is reindeer grazing land, where 32 Sami 'communities' (economic and administrative associations that organises reindeer husbandry – Sameby in Swedish) practise reindeer husbandry from the mountains to the islands in the Bothnian Bay archipelago. There are mountain Sami communities, forest Sami communities and concession Sami communities. Sami culture is a significant draw for tourists, who often want to learn more about the indigenous population. There are many active Sami entrepreneurs in the destination's hospitality sector and they are important cultural carriers.

In Sweden, reindeer husbandry is an industry reserved for the Sami communities (Sameby) according to law. In Sami society, the reindeer is the most important cultural carrier and resource. Reindeer need to roam free and graze in peace, and those visiting reindeer grazing areas must be understanding and considerate of this. The Reindeer Husbandry Act (1971:437) regulates how operators and private individuals should behave in nature and how to manage forest and land in a way that does not disturb the reindeer.

When tourism grows quickly in an area, it could have consequences for reindeer husbandry. It is important to ensure a responsible development, enabling reindeer husbandry and hospitality sector to function side by side. Knowledge and skills linked to reindeer husbandry, Sami culture and reindeer behaviour should be ensured within every hospitality sector business in the region. This work must include the Sami communities as well as Sami

institutions, authorities, and organisations. The Swedish Environmental Protection Agency, Region Norrbotten, the region administration, and the municipalities must work closely together to find forms of cooperation and information pathways between actors.

Traditional knowledge and customs

Both international and national visitors look for meetings with – or experiences based on – local and traditional knowledge. There is potential in the hospitality sector for those who possess this knowledge to communicate and transmit learning, contributing to sustainable development. It is important to safeguard, respect, preserve and retain knowledge, traditions, and customs from indigenous and local communities with a traditional way of life in our Arctic cultural landscape.

Demand generates a substantial, obvious potential to develop Sami activities, using visitors as a driving force. *Árbediehtu* is the word for Sami traditional knowledge, handed down from generation to generation, but changing and developing with time. This traditional knowledge is at work in reindeer husbandry and other Sami activities. The Torne Valley culture and other distinct places also incorporate traditions and knowledge that attract visitors. The Arctic culture is of great interest.

The research program Naptek's *Investigation of the Status and Trends of Local and Traditional Knowledge in Sweden* indicates that there is a high risk of knowledge erosion. Most of the work on local and traditional knowledge is done by non-profit organisations and through private initiatives. Collaboration is more or less non-existent, as are

incentives. The hospitality sector has an opportunity to both live up to potential visitor requirements and contribute to sustainable management of the location-specific, intangible cultural heritage. Using traditional knowledge and customs also positions the place itself.

Increased knowledge tourism connected to local cultural heritage makes local handicraft and food production more competitive.

Dialogue with stakeholders

When it comes to societal transformation and questions concerning land use and exploitation, local governments need to systematically involve all industries using the land to find a common understanding and locate synergies. We can, and should, provide examples of sound cooperation from all our industries. We need a common way forward and share the responsibility.

The forest contributes to development and the conditions necessary to live and work in rural areas. It provides raw material, attractive environments, recreation, health, and wellbeing. It also helps safeguard and enhance our intangible cultural heritage and constitutes the infrastructure for a growing hospitality sector.

To achieve our goals, there must be collaboration between actors in the forest environment as well as improved knowledge. *The regional forest program in the strategy for Norrbotten* gives an opportunity for authorities, relevant industries, forest owners, local governments, academia, and stakeholder organisations here in Sweden's largest forest area to get involved and progress towards the targets set.



For the intervention area *Respect* we will:

- improve both hospitality and hostmanship**
- promote knowledge tourism** linked to local traditions and cultural heritage
- strive towards cooperation** and engage in dialogue with the local population
- engage in dialogue with a mutual respect for other regional industries**, such as forestry, wind power, mining, reindeer husbandry and others.



Strategic intervention area: *Balance*

The hospitality sector is an important tool to create the necessary conditions for a lively countryside. It helps find a balance between the three aspects of sustainability: social sustainability, local economic sustainability, and local environmental conditions.

The hospitality sector – a tool for sustainable development

Few industries have such a distinct entire-country perspective as the hospitality sector. Solid cooperation between regions, destinations and businesses can create new and innovative solutions increasing the appeal in the form of tourism products and experiences. The industry also contributes to the protection and upkeep of natural and cultural environments, as these environments are often part of the appeal according to *A Country to Visit – a Unified Policy for Sustainable Tourism and the Growing Hospitality sector (SOU 2017:95)*. The hospitality sector is a catalyst for growth and highly likely to have more points of contact with society and other sectors than any other industry. This makes it important on both a local and a regional level for rural area development.

One of the four overarching objectives in the *Regional Development Strategy 2030* speaks of high quality of life in attractive living environments. It indicates the hospitality sector as an actor creating the necessary conditions to achieve this.

Thanks to the hospitality sector a certain kind of service can be maintained and developed, which also benefits the local population. If the location





lacks a large local customer base, this could be remedied by visitors with purchasing power. Governmental investigations show clear synergies between local service and tourism in rural areas. They also indicate the importance of the hospitality sector, as it creates livelihoods and employment.

The development strategy highlights the main challenge of encouraging young women to stay in, or choose to live in, Norrbotten. Again, our industry is a key sector contributing to a positive employment rate for young and foreign-born people, other target groups that the region has defined as critical to provide employment for, and encourage to stay. The hospitality sector's international environment makes it easy for a global, newly qualified workforce to find employment at all levels: from management positions to entry-level jobs.

The hospitality sector sets a good example for other industries and sectors when it comes to increasing the employment rate for the above target groups mentioned above, and getting them to choose our region. This is also true in terms of equal opportunities, as our industry is one of the most balanced, looking at employment rate, number of entrepreneurs, and new enterprises. The hospitality sector balances and complements the traditionally male-dominated primary industries in Norrbotten and contributes to a more varied and attractive labour market.

A place's appeal is of essence to counteract outward migration and attract new residents. Employment opportunities, service supply and recreational facilities are aspects that influence decisions to relocate – the hospitality sector makes a significant contribution to all these areas.

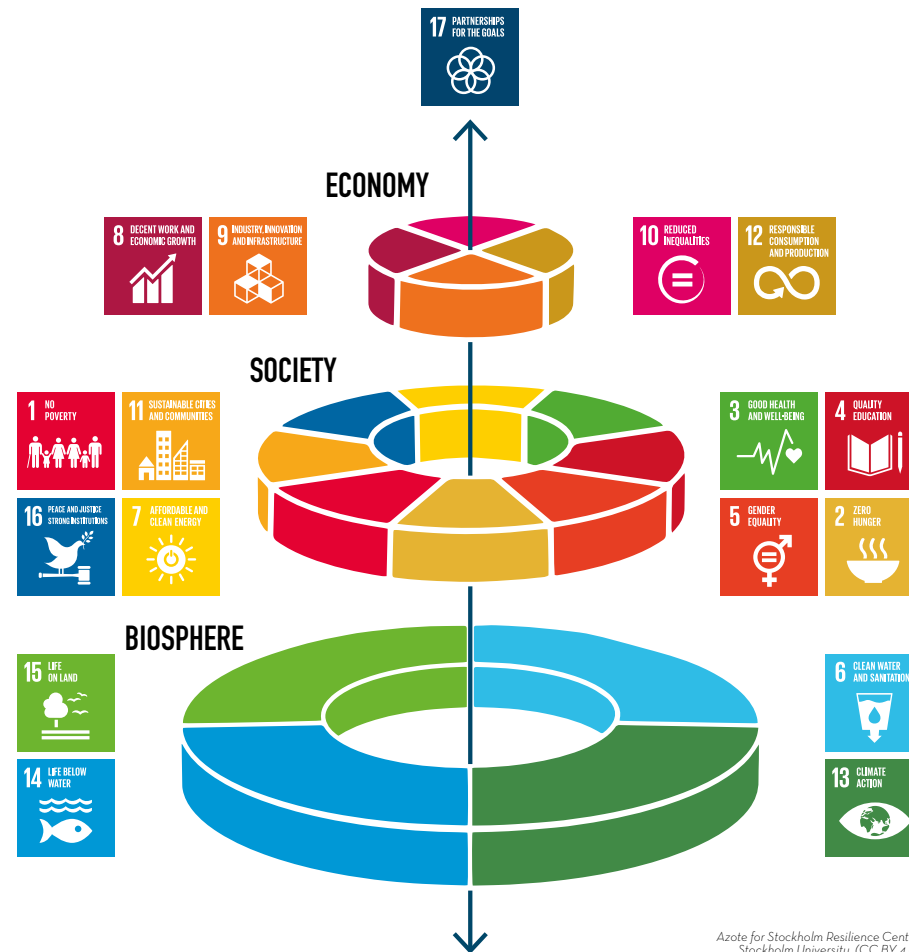


Illustration showing how economies and communities are embedded in the biosphere - integrated and interdependent.

It also strengthens beliefs in the future and increases local pride through joint efforts to enhance the destination trademark. The residents are happy to show local handicraft and traditions to visitors, which increases understanding of other cultures and increases diversity.

Solid and recognised reasons for visiting the destination create a trickle-down effect and new establishments emerge. The hospitality sector helps promote local products and can further the development of small-scale green businesses. Food production is just one of numerous examples. There are exciting future forms of cooperation waiting to be found.

Year-round income

To achieve sustainable development in the region, efforts must be made to develop and strengthen year-round activities in the hospitality sector. The challenge for many businesses is to cover the yearly fixed costs during one season, or two seasons at best. Their activities might need to be shut down during parts of the year and become economically inefficient. This affects the level of services available, and the appeal of the place.

Year-round activities also contribute positively to the skill supply. More people can be employed all year round, and more people choose to live onsite as a result. This highlights the importance of making systematic efforts to steer the flow of visitors, by developing products and actively marketing seasons, and by creating common strategies for issues relating to how, when and where visitors in the region partake the tourism offer.

Azote for Stockholm Resilience Centre, Stockholm University. (CC BY 4.0).



Visitor management – organising the unorganised

Planning for, and managing, visitors is an important part of local work, providing a foundation for sustainable tourism and a growing hospitality sector. This concerns towns, communities, rural areas and protected natural areas. But managing a place comes with its challenges.

Visitors travelling in an organised manner, buying services and experiences from hospitality sector businesses, should be assisted by local hosts to receive knowledge and insights. Visitors are given the opportunity to contribute to the place by acting responsibly and sustainably. Reaching those who travel and stay independently, the unorganised visits, is a challenge we must face together.

Visitor management – local, regional, and national – must have tools and methods in place before there is too much visitor pressure. If there is no plan for where, when, and how visits are suitable, the destination risks losing control over visitor movements and places of interest, leading to heavily exposed natural areas and disruptions to outdoor recreation and reindeer husbandry. It takes work models to steer, manage and handle visits to ensure that the visitor experience is as good as possible while creating value for the local community. This is why several actors must think and act together, using a new approach. Support structures should consist of relevant actors: national, regional, and local authorities as well as civil society, hospitality sector and business promoters.

Hospitality management is based on learning and gathering knowledge of where challenges could appear and using different tools to steer the flow of



Photo: Cori-Jehon Ulvi

visitors. For example, alternative points of interests could be promoted rather than the best-known ones, visits could be spread out throughout the year, or there could be locations that are adapted to – and have the capacity to handle – increased visitor pressure during high season. There is every reason to believe that the protected areas in Norrbotten will be more highly sought after in the future. Local visitor strategies are needed for unorganised visits to protect both natural values and public amenity in the long term. These strategies should also safeguard national objectives for recreational activities.

When speaking of visitor management and the responsibility inherent to it, there is also a possibility to realise the visitor potential of natural parks, nature reserves and other protected areas. To maximise local value creation, there must be effective collaboration between administrative actors and the hospitality sector, based on a sound understanding of roles and division of labour.

From ambiguity to clarity

Land use in Norrbotten is a complex issue. Various activities depend on nature as a resource and infrastructure, which is increasingly leading to conflicts of interest. Added to this are conflicts between global climate objectives and local environmental objectives. Ambiguities lead to differing interpretations, which in turn can lead to problematic conflicts, lengthy investigation processes and court cases. Regulating the exploitation of land is important to protect and care for the sensitive Arctic ecosystem, attractive living environments, Arctic cultural landscapes, and reindeer husbandry. Different industries are positioned against each other, whilst nature and cultural interests oppose exploitation and community development.



Photo: Håkan Stenlund

At present, there are no efficient methods and tools in place to handle these conflicts of interests. It is also unclear where the overall responsibility lies and who has the mandate and responsibility for collaboration or for balancing the various interests making claims on the land. As it stands, it is often the actors themselves who are responsible for cooperation and for creating conditions that allow for mutual development. In this context, however, consultation procedures are an imprecise method where the various stakeholders enter the process from their own point of view, with their own set of expectations. This is a result of indistinct roles, mandates, regulatory frameworks, and responsibilities.

The situation leads to land claims, an ambiguous separation of powers, and conflicting goals acting against one another, holding back development for the hospitality sector and other relevant industries, while breeding conflict. In its report *Tourism, Nature and Sustainability*, The Nordic Council of Ministers highlights the challenge of legislative and regulatory frameworks on nature and land use in Sweden, being filled with ambiguities and grey areas. The hospitality sector needs long-term transparency, clear regulatory frameworks, and legal dispositions to rely on to invest in permanent, long-term establishments in areas where national interests clash. If there is ambiguity and unpredictability, important investments will fall through. There is a need for a single actor with a global approach and overall responsibility for land use to weigh up interests and regulations that affect the development of the place. Collaboration and a balance of interest can create a suitable environment for sustainable development.

To regulate visitor pressure in some places at certain times by limiting the number of visitors is a prerequisite for sustainable visitor management.



For the intervention area *Balance* we will:

- show how the hospitality sector is a tool for sustainable community development
- develop and strengthen possibilities for year-round activities within the industry
- actively work for a shared and structured visitor management strategy
- work for clear legislation and regulatory frameworks concerning land and land use.



Strategic intervention area: *Plan*

A clear view of business objectives and a roadmap describing the direction, are imperative for fostering responsible business practices. To create the necessary conditions for the industry to keep developing in a sustainable manner, support is needed from actors on all levels: international, national, regional, and local.

Engaging with the outside world

The hospitality sector is an ever-changing sector. It consists of globally interwoven value chains that are affected by what happens in an international context. The pandemic taught us to keep an eye on global change and to make quick, informed decisions.

The hospitality sector must work strategically with monitoring, analysis, and insights, i.e. gather and analyse critical information about global events that might affect the activities and customer behaviour, as well as challenge the adaptive capacity of businesses. This is an important role for the hospitality sector to play, and it needs resources to systematically gather, process and share information about the rest of the world that has a direct effect on travel to the destination.

Statistics and measurements provide valuable information about visiting guests, and can highlight trends indicating visitor behaviour and future demand. It is important to continue developing measurement methods and to analyse and assess implications of gathered data to package it and use it for dissemination of know-how in a way that will benefit all actors within the tourism ecosystem.

As opposed to many other sectors where growth, or turnover, is measured in production, it is difficult

to measure an industry based on consumption. The hospitality sector is a network economy with several different sectors, and it is difficult to compile relevant and consolidated statistics on a local, regional, and national level. Hence, it is crucial to be prepared to assess measurement methods continuously and contribute to their advancement.

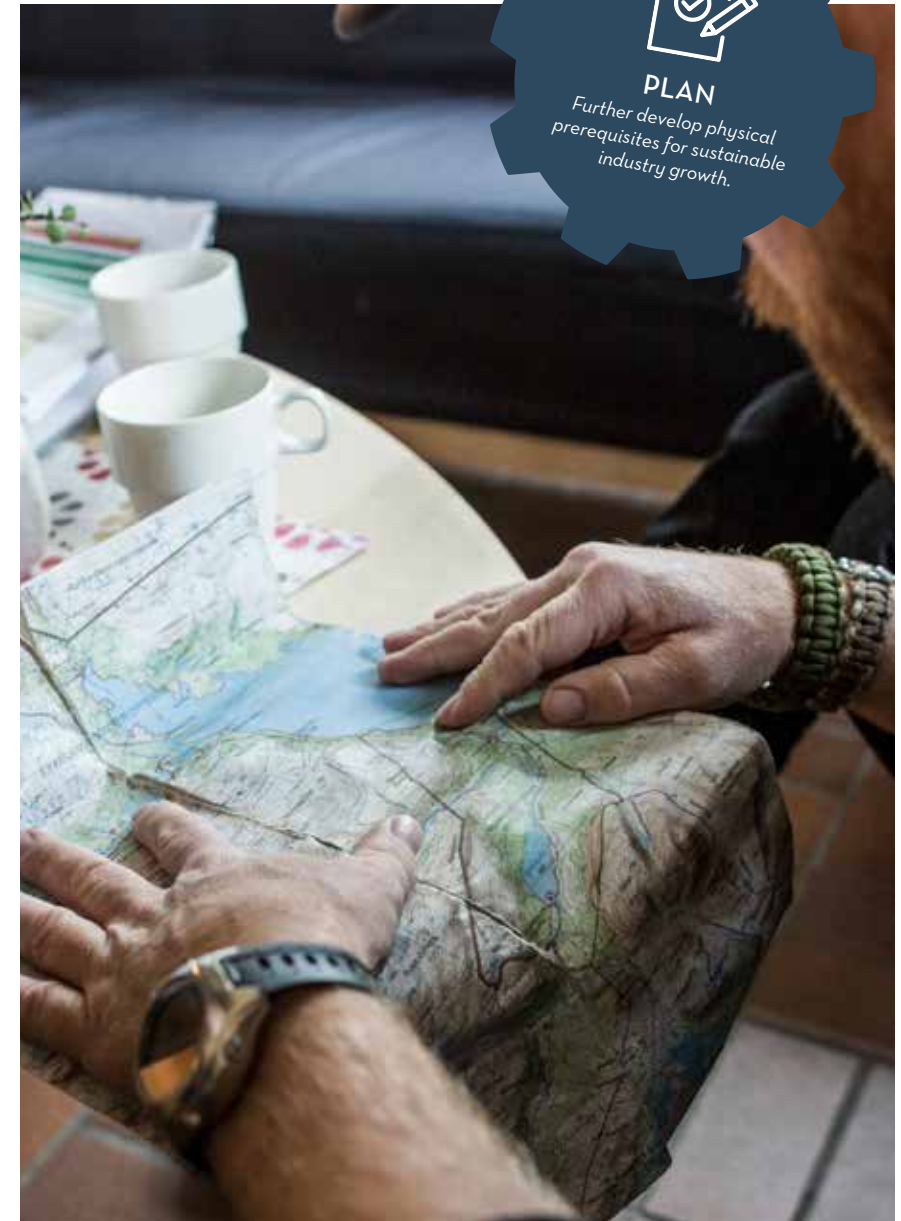
Planning for visitors

Local master plans for tourism are the foundation of successful visitor management. Active visitor management ensures a sustainable way of planning for and managing visitors at the destination, realise visitor potential and allow for a good visitor experience that is also beneficial to the local community.

The hospitality sector needs closer collaboration with local and regional growth efforts, not least when it comes to community planning. The needs of the hospitality sector should be considered in municipal planning work, building the necessary capacity to manage visitors based on local conditions and requirements. Joint efforts will create the potential to attract more visitors who contribute to new local revenue.

It is difficult to predict where a hospitality sector business might be established. As an example: who would have guessed in 2009 that in ten years' time, the small village Harads in Boden municipality would turn into a must-see success, featuring on the map of global travellers?

Successful collaboration with the hospitality sector is based on internal cooperation within the municipal sphere between those responsible for business promotion, destination development and community planning. Conflicts of interests could occur, both internally in local planning and externally with





other actors. Municipalities that are already actively working with master plans for tourism find it difficult to get small businesses to get involved and state the need for a clear industry representative, according to a report from the Swedish Association of Local Authorities and Regions: *The Hospitality sector in Community Planning*.

It takes a close dialogue to succeed, but smaller businesses rarely have the time or the resources. In its report *Recommendations to Strengthen the Hospitality sector in the Countryside (2020)*, the Swedish Board of Agriculture indicates the importance of a regional coordinating tourism actor to voice hospitality sector needs in municipal planning.

By involving the hospitality sector in the planning, businesses gain increased knowledge of municipal processes regarding planning regulations and building codes. These insights will be added to their future development efforts. Increased knowledge also leads to a better common understanding.

Another advantage of master plans for tourism is the opportunity to identify new potential areas of touristic value and set aside resources to develop these. The plans also help municipalities act proactively when it comes to new establishments and facilitate enterprise expansion. If the municipality can offer swift planning and construction permit processes, this will enable the development of the local hospitality sector.

Facilitating running a business

The hospitality sector is heavily regulated by authorities, with links to multiple policy areas. This places significant demands on the individual entrepreneur, who often has limited resources and possibilities to keep up to date with changes,

application processes and complex rules governing their activity.

The national Strategy for Sustainable Tourism and a Growing Hospitality sector describes the added value of clarity and coordination in policy areas linked to the hospitality sector. The strategy encourages new ways of working to promote the needs of businesses in the hospitality sector. On a regional level there is for example AGON – *Accelerated Green Transition in Norrbotten* – where Luleå Business Region and the Regional Administrative Board of Norrbotten operate a network to accelerate the green industrial transition in the region, for instance by increasing efficiency in licensing and updating regulatory practices.

The aim is for Norrbotten to be a testing ground for the permits and rules of the future, and a corresponding process could be used to develop tourism and hospitality industries. Actively working for simplified permits and rules in our industry is done through advocacy, which should involve other concerned regional and national parties.

Among the legal provisions directly concerning the hospitality sector, but also our visitors, are the Right of Public Access, the Reindeer Husbandry Act, and the Off-Road Driving Act. It is important to ensure



Photos: Håkan Stenlund

that visitors are well-informed, educated and follow regulations. Visitors also need to be given the right conditions and information to assume their responsibility.

The hospitality sector needs to increase knowledge of legal provisions that directly or indirectly affect its activities. From an industry perspective, some laws might also need a review or revision to respond to a new context. This takes proactive advocacy in coordination with other stakeholders.

Who gets to use the land?

Many of the Arctic experiences offered by activity companies take place on someone else's land. In some cases, it is state or municipal land, and in others it is owned by individuals or commercial undertakings. A majority of the destination consists of reindeer grazing land, regulated by the Reindeer Husbandry Act. It is important for all industries and private individuals to take this into consideration. The land is used by many. Different sectors, along with outdoor recreation, share nature as an asset and resource.

Landowners, the reindeer husbandry, and hospitality sector businesses need to understand each other's perspective and frameworks to collaborate in a structured manner and create a starting point for long-term contractual agreements with a sustainable use of nature in focus.

This refers to new enterprises as well as those already established but lacking land agreements.

Voices are heard advocating modifications to the right of public access. The hospitality sector needs to follow this development driven by increasing stress caused by accelerating tourism, industrial transition, and the overall industrialisation.



Infrastructure – a crucial issue

Hospitality sector businesses have identified travel infrastructure as an area that is crucial to their continuous development, not least in rural areas. Responsible travellers demand and expect safe, accessible, and working infrastructure at the location, and this needs to be prioritised to ensure an attractive destination. Long-term, ongoing efforts are required to ensure, plan, and invest in infrastructure, with collaboration once again being the pivotal focus. Several parties on a national and regional level need to take their responsibility on the journey towards becoming a world-class destination.

SUSTAINABLE PUBLIC TRANSPORT FOR ALL

Informed and responsible travellers, keen to reduce their footprint, are a growing target segment. A growing, synchronised network of travel by bus, air and train help visitors make sustainable choices during their trip. When a destination addresses international visitors, there is an increased need for attractive means of transport to or between nearby points of interests. This calls for coordination between different modes of transport, as well as connections. Operational synergies are possible, and one example is the regional public transport authority's initiative 'ÅkerBär', providing a new traffic map among other things.

Hospitality sector development relies on interaction between private and commercial operators, as well as public expenditure and investment. Visitor experiences are often created in places that benefit from public investment, of which transport and infrastructure is a large part. Constructive, business-driven synergies between private and public sectors influence the development of the industry.

The Regional Development Strategy 2030 indicates sustainable transport and availability as one of the focus areas for the region towards 2030. This affects those who live and work there and is also a prerequisite for the hospitality sector – a prioritised industry – to be able to grow.

We face many challenges. There is a need for more direct lines on international flights. Direct flights are more sustainable from an environmental perspective, but also in economic terms for travellers. As international modes of transports are limited, structured work to promote flight options must continue.

The industry might be active in places that are far from transportation hubs such as airports or railway stations. Within the hospitality sector we often talk of 'last-mile transportation', the challenge to find innovative, sustainable, and joint solutions to the final leg between the transportation hub and the final destination.

Traffic planning is often based on yearly averages, which often fails to show the real requirements during seasonal traffic peaks that the hospitality sector tends to add to in many locations. This needs to be made more visible. There is potential in promoting transport coordination, and the hospitality sector could be an important player in many places in the region.

Visitors rarely pay attention to regional or national borders when travelling. In Norrbotten, the only region that borders with two other countries, it becomes even more noticeable. Visitors' preferred travel routes between the northernmost regions in Norway, Sweden and Finland must be identified. They need transfer solutions that allow them to book and pay their entire route even if they travel through different countries. They should also



Photo: Per Lundström



be able to pick up a rental car in one country and return it in another.

There is intraregional work to be done, too. Regional tourist hubs and routes between municipalities must be identified and developed. The hospitality sector must have a permanent presence when planning public transport and connections between different modes of transport.

The pandemic led to increased car travel, and it is expected to increase even further in the years to come, since people state they feel more safe and flexible travelling by car. In Norrbotten, the quality of roads and road networks is closely linked to the development potential of the hospitality sector.

Train service to and within the destination suffers from recurring problems with delays and disruptions, often with severe impact on travellers. The railway network is vulnerable as most of it is one-way, and passenger transport share it with ore and freight services. The planned line Norrbottenbanan from Umeå to Luleå will enable future visitors to choose a greener way of travelling along the coast and will also create new connections between destinations.

According to the Swedish Transport Administration's forecast for passenger traffic 2040, the railway bottlenecks will persist at least until 2030. Since visitors need to feel confident when choosing to travel by train – to the destination as well as within it – expanding train services should be a priority both regionally and nationally.

FOSSIL-FREE TRAVEL

A vital piece working towards the 2030 climate objectives is fossil-free transport. If more people travel by car, new needs arise. This area has great improvement potential in Norrbotten.

The demand for a public charging structure is greater than the number of electric vehicles owned by inhabitants in the region. In part, this is due to visitors travelling by electric cars, but it is also due to the car testing industry. The proportion of electric cars sold increases every year and according to the Stockholm Chamber of Commerce report *Electric Cars are Catching Up – a Forecast of the Future Vehicle Fleet (2020)*, the Swedish vehicle fleet might consist of up to 65% electric cars in 2030.

If electric cars are to become a sustainable and competitive alternative, the right amount of charging stations must be available in the right locations, both public and commercial. This requires an extension of the public charging structure to provide fast chargers, especially along the main routes of travel. Providing good hubs for the charging infrastructure, offers visitors things to see or experience while the car is charging.

The air transport sector is getting ready for electric aircrafts. If electric aircrafts allow for passenger seats to be sold at a lower price than traditional aircrafts, this would make new routes possible, which in turn would lead to new demand, new travel routes and possible transfer from travel by car, train, and bus. Norrbotten, with its relatively empty airspace and large number of smaller airports, could be an excellent testing ground for regional routes using electric aircraft – not least considering weather conditions in the region.

Arvidsjaur, Gällivare and Pajala airports are part of Grön Flygplats, “Green Airport” – a climate project uniting regional airports in Sweden for sustainable travel. Electric flights also pave the road for a more sustainable way of travelling between us and our neighbouring countries. The possibility of flying east to west in the Nordic countries could have a

positive effect on the hospitality sector. Significant strides in electric aircraft development are being made through extensive Nordic cooperation, another factor that speaks to the future of regional electric flights.

To make these new modes of transport a reality, a balance is needed between public and private project-funding models and horizontal sectoral business models. This requires collaboration at different levels in our region, but also nationally, internationally, and between different sectors.





Photo: Lucas Nilsson

TRAILS, NATIONAL PARKS, NATURE RESERVES

There is a significant need for trails, used for activities such as hiking, biking, skiing and so on. This kind of tourism often occurs in national parks, nature reserves or other protected areas. In Norrbotten there are 2,250 kilometres' worth of state trails, and if you add private and municipal trails this number is doubled. In winter there are also additional trails created for snowmobiles and dog sledding.

There are eight national parks in Norrbotten and more than 430 nature reserves, all subject to rules and regulations. In total, 25% of the region is protected nature, compared to 12% in the country as a whole.

Interest in hiking tourism had already increased considerably – nationally as well as internationally – before the pandemic, and it keeps growing. This affects the hospitality sector in various ways. On the one hand, the target segment 'New to Nature' expands significantly, with inexperienced visitors in need of support and guidance. On the other hand, unorganised tourism increases in general, where visitors travel themselves without local guides along trails in remote areas without roads. Visitors have a responsibility to learn what the Right of Public Access and the Off-Road Driving Act entail.

Increased volumes of visitors require far-reaching joint strategies for dissemination of knowledge of

rights and obligations, information points, and a developed service infrastructure along trails. When planning and investing in new trail areas, these factors are crucial for sustainable development.

In the future, there must be joint, structured, and forward-looking work between the hospitality sector and trail managers when it comes to development, quality assurance, information, and travel to and from these areas. Together with other key actors, the Swedish Environmental Protection Agency has drawn up a national framework and collaboration model for hiking development that should be implemented in the region.

The Haparanda Archipelago National Park was created in 1995.



Photo: The Common Wanderer



DIGITAL INFRASTRUCTURE

Within the tourism infrastructure, digital infrastructure is a key element. Sweden should be a world leader in using the possibilities offered by digitalisation in 2025, according to the government digitalisation strategy. The entire country should have access to a secure, stable digital infrastructure. The 2020 objective was that 95% of households in Sweden should have access to broadband, but the number in Norrbotten was only 78%.

Region Norrbotten is systematically addressing several areas to increase the connectivity rate. The challenge is that funds set aside on a national level fail to cover the cost of extending broadband connections. This is business-critical to the hospitality sector, as businesses need the right conditions in

place to be able to function in the region's more remote locations.

The hospitality sector must be involved in initiatives to develop mobile as well as fixed broadband coverage. The ambition to have an attractive and competitive rural community makes conditions more conducive for sustainable development of the hospitality sector.

If an investment on regional travel infrastructure is complemented by an extended digital infrastructure, it creates possibilities for innovative transport solutions in the form of digital services for ride sharing, on-call bus systems and driverless vehicles, for example.



For the intervention area Plan we will:

- work systematically with relevant stakeholders, using statistics and analysis** to increase industry resilience when faced with global change, as well as build foundations for community and business development
- promote sustainable modes of transport and access to infrastructure**, both physical and digital
- contribute to the establishment of frameworks and structures for tourism on third-party land** to ensure long-term focus and sustainable use of local resources
- work to ensure that the hospitality sector and visitors are considered** in municipal plans and strategies.



Strategic intervention area: *Innovate*

Innovation presents a versatile tool for addressing challenges. Experience innovations are at the heart of hospitality sector competitiveness. Given the industry's ongoing challenges, there is a need for innovation alongside more structured collaboration to solve business-critical development issues.

Business putting the guest in focus

Sweden's Arctic destination has generous and valuable raw material in the form of nature, culture, and lifestyle. The hospitality sector must work continuously to develop and refine experiences and services requested by responsible and informed travellers. The offer must be constantly renewed to attract potential visitors and based on the needs and motives of guests, the innovative strength of businesses, and the specific local conditions. While innovation provides compelling reasons for international travel, the development of ancillary attractions will complement these efforts, helping to form a whole, a reason to travel to this very location.

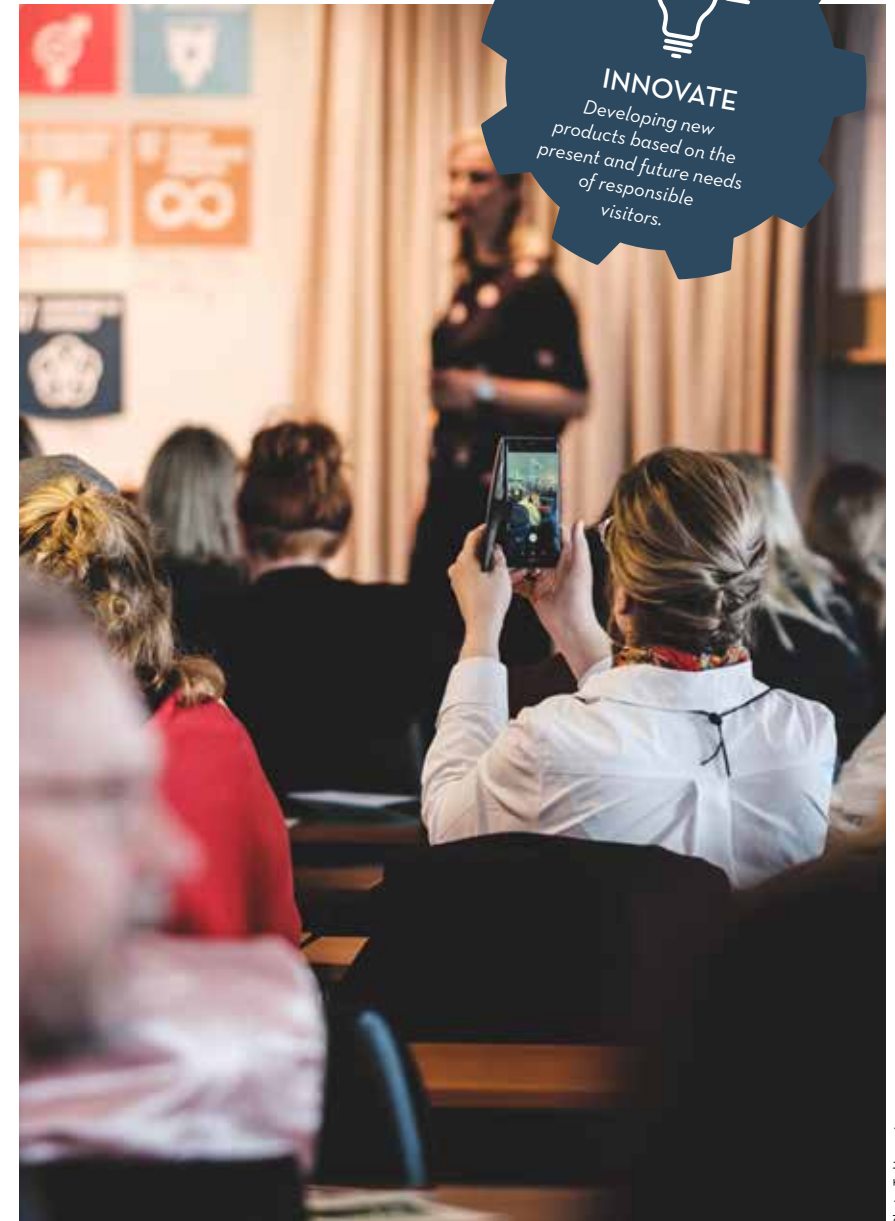
Many micro, small and medium-sized enterprises in the hospitality sector find working regular and long-term with business and product development challenging, as they lack resources and necessary conditions. Business-promoting efforts sometimes overlook the perspective of small business owners. Business and product development offered as projects can also become obstacles as they are limited in time, and efforts come to a halt at some point. On the other hand, projects can enable new and unexpected business collaboration, promoting innovation

processes. The industry itself has highlighted this, and needs to be considered going forward.

In its report *Sustainable Product Development with a Focus on Nature and Cultural Tourism*, the Swedish Agency for Economic and Regional Growth indicates the challenge of business-promoting actions not being a good fit for small enterprises in the hospitality sector, and that they are often left without innovation aid. The report also points to the importance of having a regional actor to manage and advance the tailor-made approaches for business and product development that smaller enterprises require. Besides increased knowledge of business development, pricing, digitalisation, marketing, and sales channels, there is also a need for a better understanding of international trends, markets, and customer needs. Promoters and municipalities are important actors when supporting businesses in this sense.

To be able to offer a sustainable, network-based process for business and product development in the hospitality sector, there must be tailor-made tools and methods that ensure business-promoting efforts are also adapted to the smallest enterprises. This takes regional collaboration, and an actor to actively and long-term manage and support the network.

The necessary conditions for a sustainable transition are created by integrating innovation work in the hospitality sector with regional and local development processes. Region Norrbotten's strategy for *smart specialisation* is one of several tools to ensure integration. It would be beneficial for municipalities to work proactively, supporting business development by for example setting areas aside for tourism and actively suggesting business ideas that would favour the individual entrepreneur as well as local development.





On a national level there is potential to coordinate organisations, authorities, and businesses so they can work together to strengthen hospitality sector development in rural areas. Community stakeholders should take note of these actions and implement them in the region.

Innovation in experiences and knowledge sharing

A key to promoting innovation in tourism is cross-sectoral work, linking knowledge-intensive environments, actors in the innovation support system, and the hospitality sector. Existing structures, platforms, and innovation arenas (incubators, accelerators, and technology parks) nationally, regionally, and locally have the potential to be used for knowledge and innovation. The hospitality sector needs to take its place in the innovation arena; further possibilities must be created, and access to innovation aid increase. According to Region Norrbotten's cluster analysis, there is currently a gap between the hospitality sector and the innovation support system. Few innovation arenas focus on experience innovation, and the industry lacks information on how to participate. That gap needs to be bridged.

There is a lot to be gained by cooperating with other industries to create experience innovation. Cultural and green sectors could for example share the in-depth knowledge the hospitality sector has of visitor behaviour and needs. Other sectors could also help create or deliver new experiences to enhance what the destination has to offer.

Food tourism is a growing reason for travelling, and a corner stone of the overall experience. We need more actors in the interface between food production and processing and the hospitality sector to offer the requested food experiences.



Photo: Håkan Stenlund

Catching the digital train

Everyone is aware of digitalisation. It affects customer behaviour and traveller expectations of availability and service. There is an increasing need for around-the-clock information about everything, from opening hours and prices to timetables. Hospitality sector businesses should provide not only practical information but also engaging storytelling, to both inform and attract.

Companies in rural and sparsely populated areas need digitalised business advisory services. Using technology to overcome distance, entrepreneurs can be offered digitalised service anytime, anywhere. Digitalisation of municipal services equally increases availability. It is a sustainable approach that reduces pressure on business resources as well as the environment.

Environments for virtual innovation and development can be created for key actors to interact and develop, test, and evaluate new services and solutions. Other examples of testing environments are found in the hospitality sector itself, where digital and physical forums are combined for better dynamics and to reach a wider audience – as well as other industries and new visitors.

Big data (processing large amounts of data) and AI are important tools to maximise innovation related to appeal, sales, and experiences. Hospitality sector businesses using new technology and digital solutions are part of the industry's competitiveness. Increased digital know-how makes data-powered and cost-effective marketing possible. Using data as a strategic resource, and digital tools, increases business efficiency. The hospitality sector needs collective education efforts, shared knowledge, and ongoing digitalisation processes.



Data-driven and AI-based marketing is often more cost effective and accurate compared to traditional marketing. The potential for development is huge, and the knowledge and skill of hospitality sector businesses is consistently reinforced to reach full potential.

Hospitality sector services and skills will be developed and sometimes replaced by digital and automated solutions. Companies need to be prepared for future competence exchange.

This is one of many things that Region Norrbotten's *Smart Specialisation Strategy* points out, highlighting the importance of creating digital processes where many stakeholders interact. The strategy also states that the public sphere should meet new knowledge and skill requirements that follow from digitalisation to ensure the digital infrastructure. The regional development strategy also addresses digitalisation as a strategic activity to keep the region innovative and competitive.

When it comes to digital processes, the hospitality sector has great potential to develop in a way that strengthens resilience and prepares for the future.

A circular economy

The hospitality sector can benefit from the principles of a circular economy. What differs a circular economy from recycling and closed-loop cycles, that many are working with right now, is that it aims to prevent or reduce waste throughout the value chain: from idea to finished product and end-use application of materials. The process is based on both technical and social innovation. A "sharing economy" is part of the circular economy context.

The national strategy *Circular Economy – Strategy for the Transition in Sweden*, adopted by the Swedish

government in 2020, indicates the direction and ambition of a long-term and sustainable societal transformation. This is essential for Sweden to become the world's first fossil-free welfare state. The pace of the transitioning work must accelerate to meet environmental and climate objectives, as well as several global *Agenda 2030* sustainable development goals.

Sweden's focus areas for a circular economy:

- Sustainable production and product design
- Sustainable ways of consuming and using materials, products, and services
- Non-toxic and circular cycles
- Driving force for industries and other actors promoting innovation and circular business models

Consumers' willingness to take responsibility for their consumption is increasing, which is reflected in several services where consumers are offered an opportunity to do the right thing. This could be apps offering left-over food from restaurants, tools or products lending and borrowing, or advise on recycling. Visitors can benefit from the possibility to borrow vehicles or other equipment they will only use once. The goal is to have less new production, and a more efficient use of existing resources.

A sharing economy suits smaller enterprises that can cooperate and jointly purchase services as well as products. This can also have a positive effect on local development: a few small companies might share an accountant, for example. The same approach can be used when purchasing more expensive products, such as electric bikes, snowmobiles, etc. A sharing economy has strong roots in communities where village associations have always shared resources.

Promoting natural and cross-sectoral cooperation increases the likelihood of circular solutions in the hospitality sector. It takes support and resources to work in a more innovative and methodical way. More specific guidance could help businesses who want to be a part of the local circular economy. Enterprises can even make use of their own waste – one example is Camp Ripan, where spent coffee grounds from the restaurant are used in their spa products.





Photo: Håkan Stenlund

Network economy – the visitor value chain

The hospitality sector as a network economy is based on visitor consumption of goods and services at the location. An ecosystem of services – STAY, DO, EAT, TRAVEL, SHOP. This value chain is the infrastructure of a functional destination. When visitors spend money in a place, it creates employment opportunities, and this is how the hospitality sector contributes positively to the local economy. Interaction within the tourism value chain shapes business networks that are brought together by a common target group, training course, theme, or project, for example. If the tourism value chain breaks or weakens, the entire network economy is affected.

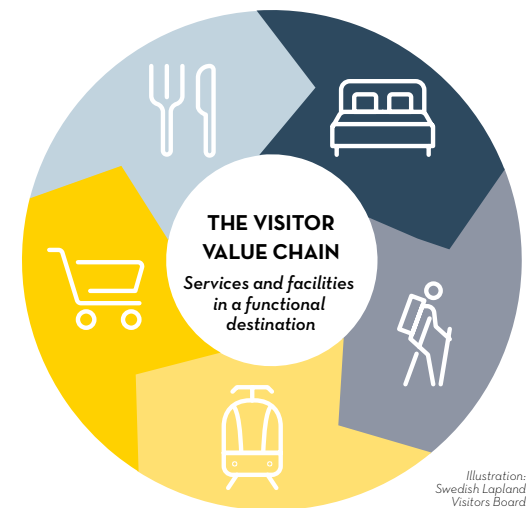


Illustration: Swedish Lapland Visitors Board

Visitors' need of service – stay, eat, do, shop, travel – is the fabric that holds the hospitality sector together as a network economy made up of several different sectors.



The surrounding ecosystem

To be able to deliver a functional and attractive value chain to visitors, the hospitality sector relies on its surrounding context – an ecosystem.

The report *Sustainable Product Development with a Focus on Nature and Cultural Tourism* prepared by the Swedish Agency for Economic and Regional Growth shows that hospitality sector issues are relatively separated from other regional growth efforts, with a weak link to regional strategies. The report shows the need for a wider perspective and more forms of cooperation with other actors in the ecosystem.

A unified view of the ecosystem, coupled with seamless integration, can significantly enhance the cultivation of the region's unique potential, serving as a catalyst for sustainable development. Cooperation builds smart and trust-based network constellations that create new business opportunities, employment, and businesses, but also contribute to addressing societal challenges.

Coordination within the surrounding ecosystem enables businesses to be more innovative and strategic, compared to acting independently. Focusing solely on businesses, representing the core of tourism, would mean overlooking the interconnected value chain that binds the tourism industry together.

The main goal should always be to enhance value creation along the entire chain while bolstering its competitiveness. The hospitality sector plays a crucial role in numerous processes at both local and regional levels. By convening representatives from businesses and other stakeholders, collaborative efforts can be made to establish platforms that actively promotes sustainability across various sectors and levels.

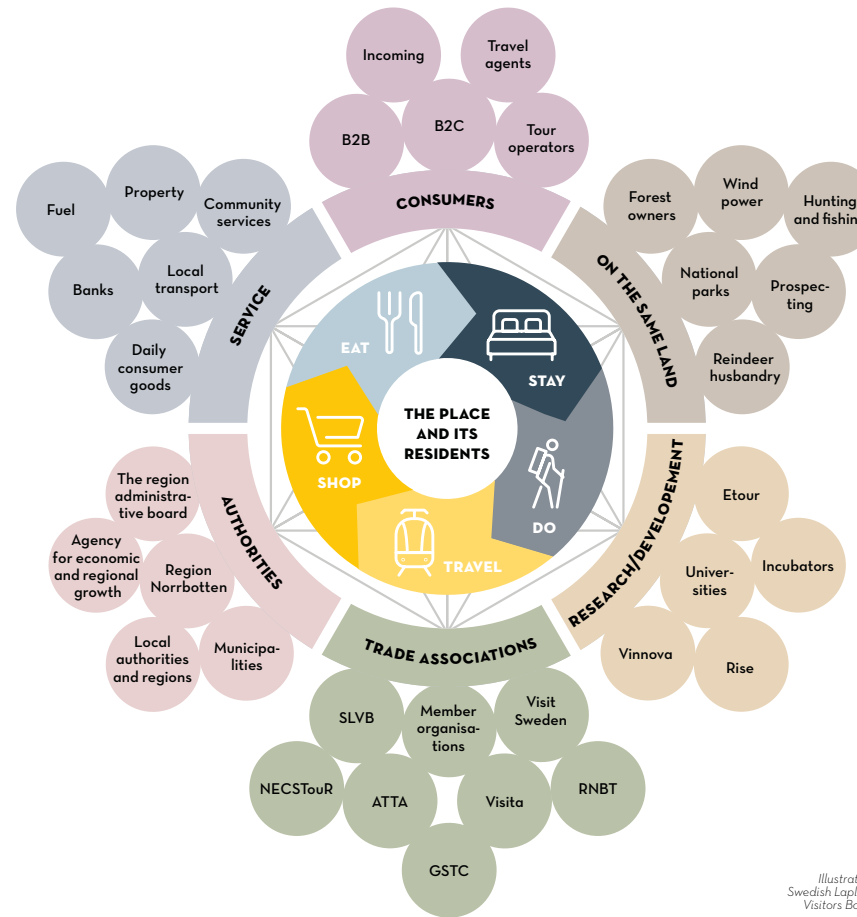


Illustration: Swedish Lapland Visitors Board

When actors from the hospitality sector, research, academy, public activity, the non-profit sector, and society at large come together, it creates a better understanding of other activities and their context. Ultimately, this leads to regional innovation and renewal.

Advantages of a coordinated ecosystem:

- New customer segments and products, e.g. by continuously creating possibilities based on trends
- Support to apply sustainable development principles in business strategy and marketing
- Reduce costs for businesses through cost-sharing and improved efficiency

- New paths to financing and investments
- Easier to hire skilled staff
- Cooperation, innovation, new business models and skills
- Competitiveness and quality in products and service
- Contribution to sustainable development, job creation and diversification of the business environment
- Technology development, digitalisation, quality development, data use for analysis and optimisation
- Business environment monitoring – risk mitigation – resilience

The hospitality sector ecosystem is based on a core of companies wanting to do business – in fair competition – based on a common objective and collaboration. To be able to deliver a functional product to potential visitors, the hospitality sector relies on a wider context of commercial market partners, business services, authorities, educational institutions, academia and research, and innovation environments.

The regional hospitality sector cluster comprises some 500 active hospitality sector entrepreneurs in the sectors stay, eat, do, shop and travel.



Read the analysis of the hospitality sector cluster in Swedish Lapland (in Swedish) at swedishlapland-visitorsboard.com.



Right people in the right place

Availability of skill is a business-critical area. It was highlighted as a key area to prioritise in the preliminary study that preceded the formulation of the hospitality sector strategy, and follow-up investigations show that the area is still one of the most important elements for industry development.

Availability of skill is also indicated as a focus area in the *Regional Development Strategy 2030*, which especially emphasises the importance of including groups currently outside the labour market. The hospitality sector has a role to play, as it can employ young people, new arrivals, and recent graduates relatively quickly. It is important to note that the hospitality sector offers more than just entry-level jobs; it is highly international, and a global workforce can find work on all levels.

It is essential to strengthen business professionalism, which enhances the ability to operate and grow a hospitality business. Also, various business promoting systems in the region (ALMI, Nyföretagarcentrum, etc.) can lower their thresholds and seize the potential of future hospitality entrepreneurs.

How well the hospitality sector can attract competence depends on its ability to evolve as an employer throughout the employment journey – attract, recruit, develop, keep, and conclude in the best way possible.

There is a need for better understanding of what matters to people when choosing employer or sector, and how businesses can live up to these expectations.

At the heart of Norrbotten's economy are its mineral resources, forestry assets and unique energy infrastructure, collectively driving its nature-based economy.

Smart specialisation, S3



Arctic testing grounds

Smart diversification



Energy technology

Smart diversification



Space technology

Smart diversification



Cultural and creative industries

Smart diversification



Hospitality sector

Smart diversification

The public sector is another significant part of Norrbotten's gross regional product – GRP. State, municipalities and region councils accounted for 42 percent of the total employment.

Smart society

Illustration: Swedish Lapland Visitors Board / Smart specialisering i Norrbotten

The hospitality sector is an essential cog in the wheel for regional development. Region Norrbotten's Smart Specialisation Strategy points to the hospitality sector as one of five industries with great growth potential and ability to contribute to the overall picture of the region's competitiveness.

We also see a demand for new skills that has not been required in the industry up until now. Digitalisation and automatization make certain occupations superfluous, while others become even more important. Brand new occupations are created as man and machine cooperate.

The hospitality sector should be up to date on business-critical competence to ensure continuous development and enhanced competitiveness.

There are roles and tasks that are difficult to automate. Creativity, social competence, and perceptiveness will increase in value, as well as other complex tasks such as problem solving and understanding guest requirements in individual situations.

Another challenge is the impending generational renewal. In some ten years or so, many characteristic establishments in the region will have to change hands. This comes with both risks and possibilities.



Valuable knowledge, experience and skills are in danger of being lost, new generations need to be introduced.

According to the regional development strategy, it is essential to find, develop and retain skill and expertise for Norrbotten to be appealing and competitive. All actors within the tourism ecosystem should be proactive, developing ways of working and cooperating with different competences and sectors. Increasing the number of residents in the region will take more active international recruitment efforts, aiming at stability through inwards migration.

Relevant education

Norrbotten currently lacks educational programmes geared towards the hospitality sector across all educational levels (secondary schools, post-secondary education, higher vocational schools, and universities). It is a potential threat to the growth of the industry, but also means that people moving out of the region to go to school might not come back after graduating. This must be remedied.

Hospitality sector businesses would like a clearer distinction between qualification levels. Above all, education at an academic level within the region should be ensured.

The so-called college concept for healthcare and technology developed in the region could be extended to the hospitality sector to create a platform for interaction between municipalities, educational coordinators, companies, and unions.

Digitalisation also brings possibilities for more flexible remote learning, which is ideally suited for a combination of education, training, and work.

There are a number of needs within the hospitality sector, among them availability of skills, that must be met through closer cooperation with the world of research. Proactively approaching the research community with business-related ideas and projects to examine, could be crucial to further development.



Photo: Sven Burman



Investments

Other essential elements in the development of the regional hospitality sector are willingness to invest, investment needs, and investment possibilities. These needs are present on more than one level: regional and in some cases national investments are necessary for tourism-critical infrastructure, and direct investment in hospitality sector business is necessary for new establishments, reconstructions, and restructurings, or to expand existing enterprises.

As the hospitality sector joins the transition towards a more sustainable future, it will take major investments. This involves buildings, water and energy supply, and fossil-free equipment for companies providing activities involving snowmobiles or other vehicles, for example. Public incentives will play an important role, and so will the option of securing favourable business loans. Financing to promote innovation will be required to seize opportunities in technological and digital development. This could be in the form of public investment funds, but private investors are also needed.

To allow hospitality sector businesses to grow and develop, financing and loans must be available. Research shows that proximity to bank branches has a positive effect on the number of new enterprises, whereas longer distances mean more limited access to investment capital. When local bank offices are closed, local knowledge of business possibilities, business plans, and repayment capacity deteriorates. This might lead to funding concerns, especially for small businesses. Financing requests for investments in premises in smaller locations are often turned down, because the property value of the finished building would not meet the bank's collateral requirement.

When the hospitality sector grows in rural areas, more homes will be needed. In some places it might be difficult to find property owners willing to invest. They, too, face financing challenges when the assessed value of the property is lower than the construction costs. There might also be a lack of land available for construction. Credit decisions are largely governed by regulatory frameworks that cannot be altered locally. The hospitality sector, together with municipalities and the region, should have a close dialogue with banks and business promoters to spread the message about the place's attractiveness, market potential, and future prospects.

Networks must be identified and built where financial and lending institutions, investors and the industry can interact in a productive manner. The hospitality sector also needs to be present when investment aid and other financial resources are announced on a national and regional level. Promoters of the hospitality sector should be offered knowledge, information, and influence.

In Sweden's Export and Investment Strategy, the government indicates that it will take a sustained, coordinated strategic approach for export and investment promotion to provide the best possible benefits for nationwide entrepreneurship and employment. Developing Swedish points of interest and marketing Sweden as an attractive tourist nation abroad are priority areas, for example within nature tourism. Support to tourism and hospitality companies is developing within the framework of regional export cooperation. The government strategy also describes how keeping and enhancing Sweden's sustainability profile can provide substantial competitive advantages. From north to south

there is contemporary culture and a cultural heritage, unique nature and city life, new and traditional events – all contributing to Sweden's overall image and attracting important target groups.



For the intervention area *Innovate we will:*

- foster enhanced, cross-sectorial innovation processes** in the hospitality sector to promote investment, and business and product development
- strengthen and develop the hospitality sector ecosystem** to increase regional innovation, sustainable development, and renewal
- make use of possibilities that can be created by circular solutions**
- aim to increase the attractiveness of the industry as an employer**, and create possibilities for increased competence and recruitment, both in the short and long term.



Strategic intervention area: *Attract*

Marketing a place where people live gives the hospitality sector a particular responsibility. There is more involved than just attracting visitors – it is also about adding value to the location.

The appeal of the place

Today and tomorrow, the hospitality sector is and will be all about quality of life and local accommodation. Pride and identity, with a blurring between values created for inhabitants and values created for visitors. International visitors provide an international atmosphere, visitors also provide more customers for restaurants, keep supermarkets open, and add to a sense of vitality. The hospitality sector helps define what makes a place appealing today, and how it should look in the future. Sweden's Arctic region is a place with access to welfare, nature, and values inherent to the concept of sustainability.

The hospitality sector addresses and helps solve many broader societal challenges. The effects are numerous and complex, but it is important to keep making strategic investments to ensure long-term sustainable development.

There is increasing competition for investment, visitors and people relocating. To face this global competition, the hospitality sector must develop methods and tools to reinforce a place's appeal.

The hospitality sector in the region has worked strategically and with a long-term perspective to

establish collaboration between companies in the industry, at both municipal and regional levels, and for the development of marketing as well as sales. The next step is to extend the collaboration to include additional sectors.

There are many reasons why we should continue making our region an attractive place from a visitor perspective as well as a local viewpoint, and they hold the answers to whether you want to visit, stay or move there.

The future strategy of the hospitality sector should not merely focus on attracting sustainable travel. It should also be expected to develop a sector that can attract visitors, inwards migration, and students – and not least: convince people to stay. This contributes to the development of society as a whole.

National strategies for tourism and export highlight the pivotal role of the hospital industry in collaboration with regional enablers, initiating and leading the development efforts aimed at enhancing the attractiveness of the place.

Creating an appealing destination takes local, strategic, and target-oriented efforts engaging diverse stakeholders from both the private and public sectors. Additionally, academia and knowledge-generating entities play a vital role in developing methodologies to effectively measure and interpret societal impacts. The hospitality sector serves as a facilitator in this endeavour, building and reinforcing the community fabric.





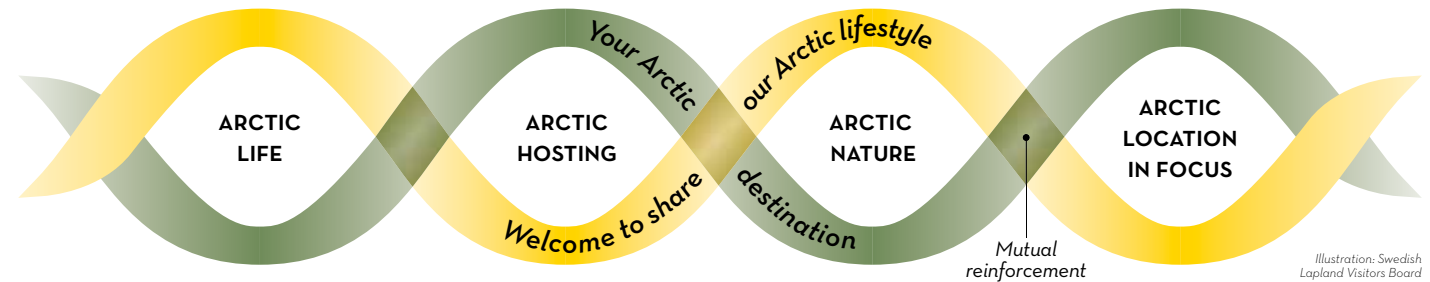
The shared destination trademark

The hospitality sector is an important factor when creating appeal and promoting the identity of a place. The hospitality sector, with Swedish Lapland Visitors Board at the helm, has in recent years worked in a structured manner to promote the trademark Swedish Lapland. It is charged with identity-shaping components that give the location an internationally competitive position and distinguish the destination from other destinations in Sweden and the Arctic. The destination's combination of nature, people, culture, and history gives comparative advantages and weaves the DNA of the destination. This permeates the market communication, based on four of the destination's most essential and timeless immaterial added values: Arctic life, Arctic hosting, Arctic nature, Arctic location in focus – creating a key message and trademark promise.

Welcome to share our Arctic lifestyle.

Businesses, organisations, and people in the destination do not just recognise this trademark promise – it is something they live. When visitors return to their homes, people here continue their Arctic everyday life. Because of this, it is strategically important to transmit an image of Sweden's Arctic destination that confirms the inhabitants' view of the place. They are very much a part of the process and help transmit the added values of the destination trademark.

Sweden's Arctic destination has several distinguishing competitive advantages that are in demand right now, and will be in the future: participation, limited climate impact, and genuine social responsibility. What our marketing transmits should be felt and experienced by visitors once they arrive.



Life here is perceived as less complicated and more real.

- Local knowledge passed through the generations
- Traditional and modern handicraft, art, and design
- Little things can matter the most
- Natural frugality – an ecological lifestyle
- Culture-based activities and experiences
- New perspectives
- Aligned with people's own values and beliefs

Meet sincere people who are happy to share their everyday life.

- Meaningful meetings
- A personal approach
- Willing storytellers
- Local bearers of knowledge
- Stories and conversation around an open fire
- A welcoming community
- A feeling of being in someone's home
- An honest passion
- Permissive and including

Focus is on our love of nature and the local culture.

- Nature as religion and knowledge bank
- Nature as a healing power
- Nature-based activities and experiences
- The changing seasons and the changing light
- Caring for animals, nature, and fellow human beings
- Clean water and clean air

Every point of interest, village, community, and town has a story to tell.

- Local traditions and customs define the place
- Magnificent experiences
- Experiences in tune with the place
- Nature's pantry – plants, herbs, and game
- Locally produced ingredients and goods
- Linguistic diversity and traditions
- A living cultural heritage

The destination trademark is characterised by four added values reflecting the location's identity and way of life. Together with the trademark promise and position, these values are mutually reinforcing – the basis for long-term, sustainable, and transformative trademark cooperation.



The trademark strategy can be read in its entirety (in Swedish) at swedishlaplandvisitorsboard.com.



Photo: freepik.com

Increase knowledge about Sweden's Arctic destination

'Always on' is a popular expression these days. Social networks and the web are a never-ending stream, and Sweden's Arctic destination should be part of it – in its own way – at all times. It is an old truth that what you cannot see, does not exist. But the most important thing is to put the destination's message out there. Daring to be something, or someone, to cut through the noise. The destination's ambition is to be a topic of conversation among travellers all over the world. To put it simply: to show that the Arctic lifestyle is preferable, and all the reasons why.

The groundwork has been established, through development projects, but notably due to the contributions of local communities and businesses within the hospitality sector. This collective effort aims to enhance awareness of Sweden's Arctic destination, making it more appealing to the responsible traveller. Significant content has been added to the destination's narrative – a tale rooted in individual dedication and highlighting its positive attributes worth preserving. This narrative will endure through its people.

The key to this is using methods with big data and AI for joint, organised work with digital dissemination. Swedish Lapland Visitors Board has spent years developing a tailor-made AI-based tool that works according to the classic AIDA method (Attention, Interest, Desire, Action). The tool is used for communication and marketing, related to hospitality sector businesses as well as the destination trademark. The joint user data becomes a living ecosystem with no internal competition, where outputs become possibilities for others, for the destination in general, and for every individual business. The underlying strategy provides all hospitality sector businesses with the same opportunities to reach new customers.

To fulfil the ambition of being part of responsible travellers' daily life, a dialogue is created rather than a campaign. Participation becomes just as crucial as being 'always on', and the stories should resonate with people's emotional and cognitive choices. Sweden's Arctic destination adopts a comprehensive approach to content, distribution, and data analysis that is cutting-edge. The guiding principle of the work is 'create meaning, not marketing'.



The right target group

The starting point for hospitality sector marketing work are the needs and drives of the target group, whether it involves marketing, business and product development, or destination development. Who are our visitors? What do visitors want to experience, see, and do? How does this filter through the entire guest chain? How can visitors be involved and take responsibility for the development of the place?

The right message and the right experience for the right person. The offerings of the destination and businesses being matched against demand. This takes knowledge, planning and focus.

Sweden's Arctic destination has a joint target group strategy, illustrated to the right. It is based on trends identified in the analysis of the present situation as well as target group work made through Visit Sweden. The overall target group is the responsible traveller – an informed traveller who makes reasoned choices, who is curious and pursues a simple, natural lifestyle whether travelling for business or for leisure. A responsible traveller values the place and the experience.

The target group strategy departs from four reasons to travel: local culture, adventure time, time together, and alone time. It provides in-depth descriptions of drivers and key messages, support for marketing tailored to the target group, and product development for businesses wishing to address responsible travellers.



The target group strategy in its entirety can be found (in Swedish) at Swedish Lapland Visitors Board.

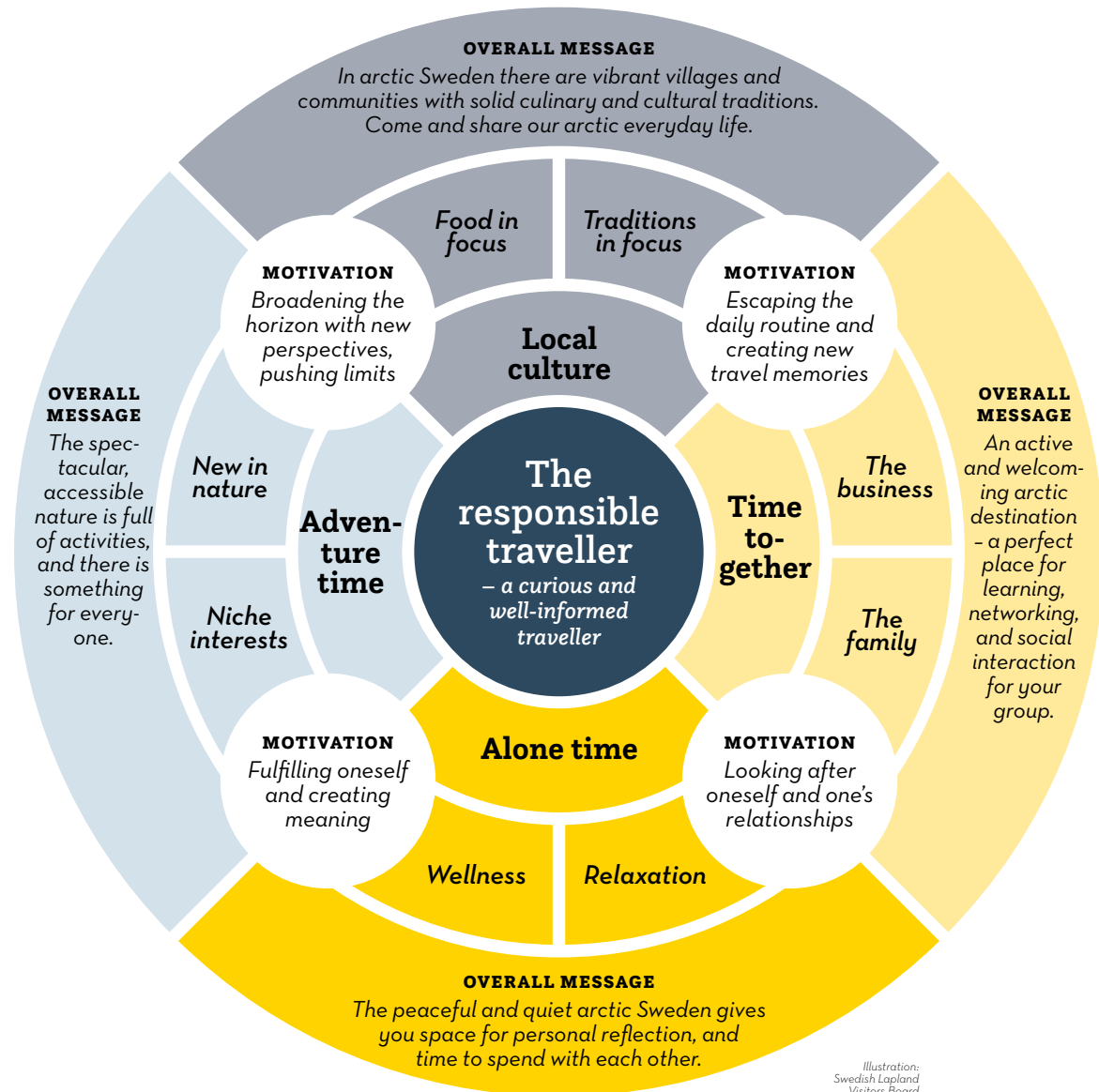


Illustration: Swedish Lapland Visitors Board

We divide our overall target group into four groups based on the reason for making the trip - motivation segments - that are further subdivided into eight guest categories.



The right message at the right time

Visitors need different information and messages depending on where they are in the *travel cycle*. The cycle illustrates a whole – before, during and after the trip – and the tool can guide analysis and marketing efforts.

Travellers need to be reached by a tailored message through several different channels and at many different times before they choose Sweden's Arctic destination. Consequently, there is a need for long-term, knowledge-creating marketing as well as short-term and selling product marketing.



The visitor travel cycle helps identify the need for targeted action in communication, marketing, and digital accessibility. The key is being in the right spot with the right message and effort, depending on what stage the traveller is in.

During the different stages of travel, hospitality sector businesses must find suitable partners to maximise exposure and run cost-effective promotional campaigns. The role of Swedish Lapland Visitors Board in this process is to coordinate efforts to maximise the benefit for all participants, and to ensure quality in destination trademark communication.

The travel cycle can also be used to illustrate where the various hospitality sector businesses act in the value chain. In essence, several internationally established actors work with the stages *Dream, Plan and Book*, and they help increase destination knowledge and desire to travel.

Other businesses meet the visitors when they arrive. It could be the petrol station, the local handicraft shop, or the taxi driver. They do not always see themselves as a hospitality sector business but are an important part of the overall destination experience.

Once at the destination, the visitor looks for things to do – points of interest. Enhancing the digital accessibility of experience businesses holds substantial potential, allowing visitors to find and book their experiences. The advantages are many, the local economy grows, and the visitor is given a reason to stay longer.



For the intervention area *Attract* we will:

- consistent and long-term work with the location's appeal** towards visitors, locals, inward migrants, investors, and other stakeholders
- make cost-effective and accurate marketing efforts** aimed at the right target group, with the right message at the right place, at the right time, and with the right partner
- participate in coordinated marketing action** – internationally, nationally, regionally and locally – to optimise our competitive edge on a global scale
- work on increasing knowledge and attractiveness** related to our Arctic destination and the reasons for travelling here
- work with, develop, and market actors** in all stages of travel.



An Arctic agenda for a more responsible destination

In the Arctic, global warming is happening twice as fast as in other parts of the world. This affects the way our nature, our lives and communities are structured, and these impacts will continue to be felt.

Care for the Arctic is an Arctic agenda for the key stakeholders in a responsible destination. It is based on the European Tourism Agenda 2030 and the Global Goals 2030, turning vision into action and harnessing people's commitment to their local community.

Each call for action in the agenda's toolbox shows how individuals, entrepreneurs and enablers can take more responsibility through action and help co-create place development. The aim is to create value; locally and globally, today, and for future generations.



Photo: Nino Peis

Care for the Arctic was used as a unified key message during Emigration Expo in Houten 2023. The message served as an umbrella for all municipalities in Norrbotten to position Arctic Sweden as a collective signature and attract migrants to the region.

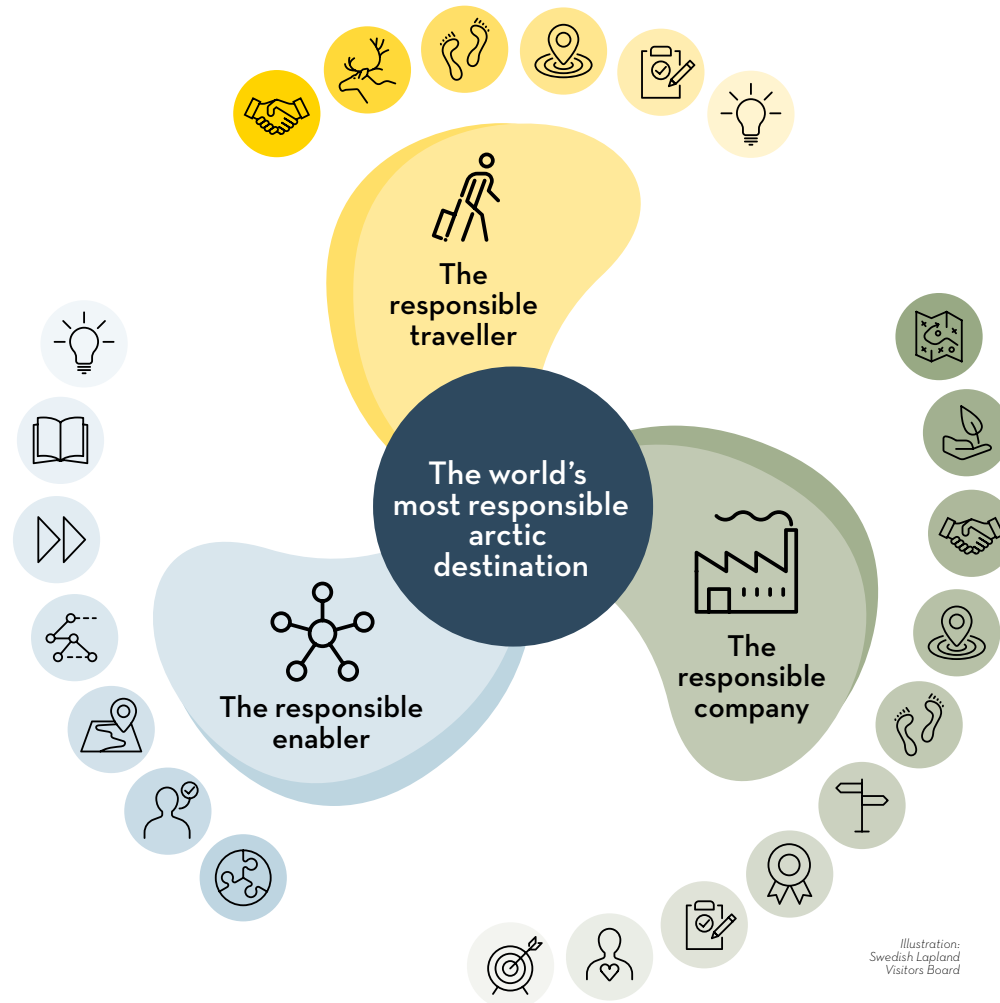
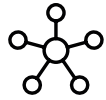


Illustration: Swedish Lapland Visitors Board

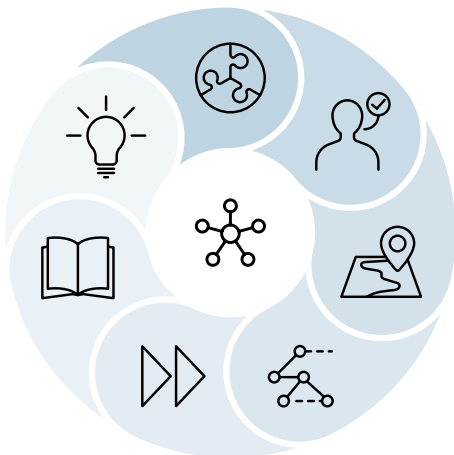


THE RESPONSIBLE ENABLER

It is difficult to act as a responsible entrepreneur or visitor without the right conditions in place. Enablers, municipal and regional actors, authorities, civil society, and several others must assume their responsibility on the journey towards becoming the world's most responsible Arctic destination.

Collaboration is essential. Hospitality sector businesses should be met with sensitivity to the specific conditions of the sector, and the fact that local, regional, and national enablers have knowledge about the needs of visitors. Leadership, innovation, and competence are crucial for further development.

With Region Norrbotten's own strategies and development plans, the 2030 Agenda and the EU's Tourism Transition Pathway as support, seven criteria have been prioritised and adapted; we call for responsible enablers to deliver on these requests.



Seven requests for informed and responsible enablers



Collaborate locally. Collaborate in both old and new constellations to find the right forms of interaction and common goals for development. That benefits all who live and work in your location. The tourism and hospitality network economy and value chains include many different sectors and also have a bearing on public-sector and not-for-profit services.



Understand the visitor's needs. Give visitors the opportunity to take advantage of our common services and infrastructure. Gain knowledge about visitors' specific needs and be aware of, and attentive to, conditions in the tourism and hospitality sector. In this way, many obstacles can be overcome and you create new values for your local community.



Clarify the terms of responsible land use. Plan and create long-term guidelines for a responsible destination. Many tourism companies operate on land they do not own, making permitting procedures, agreements, designated areas for tourism-related activities and an understanding of 'right of common' crucial for their success.



Increase accessibility. Develop travel infrastructure by tailoring regional and local transit services to also meet visitor requirements. Prioritise regional investment in sustainable modes of transport on land, water and in the air, expanded charging infrastructure and road maintenance. Access to broadband and mobile-phone coverage in the region is also decisive.



Foster a business-friendly climate. The tourism sector is highly dependent on public authorities and regulatory bodies, which places high demands on small and micro-companies. Review, design and apply processes ways that simplifies. Shortening the time of application and permitting processes are particularly important.



Attract and retain the right co-workers. Labour and recruitment of competent, qualified people in all positions is a decisive factor for the success of the tourism and hospitality sector's ongoing development. More relevant training programmes directed at all levels of the sector are essential. Social inclusion creates the right conditions for an attractive place to live and work.



Stimulate change and innovation. Gather insight to challenge established structures and business models using effective, tested methods and early-stage user testing. We are undergoing a paradigm shift; public policy and means of control must be coordinated to meet the future.



THE RESPONSIBLE COMPANY

A responsible company is driven by a will to develop its activities and products in a sustainable way and offers visitors good hospitality and experiences respecting the place. A responsible company has a plan making it possible for guests to make sustainable and informed choices during their stay, and is also a good employer. Development work takes the place into consideration and contributes to it, with a solid foundation in the local community.

Based on the Global Sustainable Tourism Council's criteria for hospitality sector companies, the 2030 Agenda and the EU's Tourism Transition Pathway as well as other regional strategies, ten criteria have been prioritised and adapted; we call for responsible companies to deliver on these requests.



Ten requests for informed and responsible companies



Make a plan. Establish systems for tracking and overseeing sustainability initiatives. Develop a comprehensive, long-term plan tailored to the scale of your business and the resources at your disposal. Talk about the positive effects that your work has on guests, suppliers and collaborating partners.



Show concern for the place. Gain an understanding of environmental terms and conditions and adapt accordingly to its opportunities and constraints. The world is in a constant state of flux, so evolve alongside it while adhering to the specific conditions of your surroundings.



Respect your neighbours and guests. Act to make the tourism and hospitality sector more inclusive and accessible for diverse groups of visitors. Honor local culture and customs and actively engage in meaningful dialogues with key stakeholders, including Sami villages and local residents. Sign or renew agreements with landowners and other stakeholders to support these initiatives.



Act locally. Recognize your role within the local network economy and the tourism value chain. It's essential to understand that the majority of the offerings and experiences are derived from locally produced goods and services, setting the stage for a sustainable future.



Minimise your footprint. Promote climate-smart transport and travel. Create conditions for distributing the numbers of visits throughout the entire year. Take advantage of opportunities that arise within the sharing economy and circularity.



Make it easy to do the right thing. Enable guests to support sustainability and the local economy. Guide them on responsible behavior during their visit. Be open and transparent about your business's journey towards sustainability; with respect to deficiencies, objectives and future plans.



Be a good employer. Offer fair terms of employment, competitive salaries and clearly-defined opportunities for professional development. Communicate your company's values and objectives to all team members. Understand the motivations of your current and prospective employees. Extend operating seasons to foster a sustainable business with improved working conditions.



Provide safe experiences. Follow national and local safety regulations and recommendations to ensure safe and secure experiences and workplaces. Ensure that you have the necessary insurance, permits, and authorizations in place. Continuously plan and conduct risk assessments. In case of an accident, is there support available for both guests and co-workers?



Be a hospitable host. Keep in mind that genuine hospitality benefits both guests and hosts. Familiarize yourself with Swedish Lapland and share information about various attractions beyond your own. Tailor your offerings, advice, and hospitality to the guest's position in their travel journey. Communicate with guests through their preferred channel.



Choose the right guests. Target marketing efforts at 'The Responsible Traveler.' This approach increases your chances of reaching those who are interested in what you offer. The more accurately you tailor your offering to someone whose needs you can address or whose requests you can fulfill, the more cost-effective your marketing becomes.



THE RESPONSIBLE TRAVELLER

There is an active awareness about how travel affects places, nature, and culture worldwide – positively as well as negatively. By reflecting on their impact, visitors also take responsibility for making the most sustainable choices possible, whether this involves interaction with the local community, transport, accommodation, or other hospitality sector services.

The World Tourism Organization (UNWTO), the UN entity responsible for promoting responsible, sustainable, and publicly available tourism, has defined a number of criteria to fulfil to be a responsible traveller. The Global Sustainable Tourism Council also provides criteria in the form of global standards for sustainable travel and tourism. Taking these definitions as a starting point, six criteria have been prioritised and adapted; we call for responsible visitors to fulfil these at the destination.



Six requests for informed and responsible travellers



Respect your fellow human beings. Safeguard human rights and our common heritage. Do research on the destination to learn more. By understanding what makes the place unique – its history, customs and culture – you will have a more enriching experience. This will make it easier for you to make more informed choices during your travels.



Protect our Arctic nature. Protect our sensitive ecosystems in the mountains, forests and coastal areas. Respect wildlife and its habitats. In protected areas, visit only places that are reserved for visitors. Minimise wear-and-tear, follow designated pathways, take only pictures and leave nothing but footprints. Stay updated on local regulations and restrictions.



Minimise your climate impact. Remember; your travel places a burden on the environment. Plan travel so as to minimise your impact and be careful how you use energy while you are here. Reduce waste, refrain from using single-use items and recycle whenever possible. Minimise your footprint and leave only good impressions.



Buy locally. Support companies that operate locally and that foster equality and diversity. Choose locally produced goods and enjoy unique, local experiences. Respect local artisans and producers by paying fair prices. Hire local guides and purchase local services.



Travel safely and securely. Take care of yourself, find out which travel rules apply and travel with the right insurance. Our destination is a unique region with Arctic conditions and rapidly changing weather. The right equipment and the right attitude are prerequisites for a rewarding experience. Many wild animals also use our roads. Drive carefully.



Be an informed traveler. Enjoy your stay by meeting local residents and getting acquainted with, and respecting, their lifestyle. Choose companies and operators that have environmental and sustainability policies. Comply with laws and regulations. Respect private property. Don't always choose the most frequently visited places or the most popular seasons. Slow down, stay longer.



Concluding remarks

The world's most responsible Arctic destination does not appear overnight. There is no magic wand to wave. It will take dedicated and insightful labour to achieve this goal and it is best done together, because the simple truth is that a burden shared is a burden halved. Regional representatives, local entrepreneurs, decision makers and implementers, residents, and guests – we can all collaborate to keep our Arctic lifestyle and develop it to build a better future for the world.

Perhaps you have just taken your first step towards it, reading this strategy. For others, this work has been ongoing for generations. Our place on Earth is unparalleled in several regards, but there is no guarantee that it will always be this way. It takes awareness and a will to keep the identity and quality of a place: keeping the air clean, the water clear and the village inhabited in the future.

The Arctic lifestyle is in many ways already sustainable, but a lifestyle can always be improved – a regenerative approach.

It takes **respect** for the place and for each other, a **balance** in our choices, but also **planning** and **innovation** to maintain our ability to **attract** people to Sweden's most welcoming and innovative region, Sweden's Arctic destination.



Photo: Magnus Winbjörk



Summary of the strategic roadmap towards 2030

To strive for, and operate as, a responsible destination must be seen as an ongoing journey. Those of us living here now were not the first, and we will not be the last. That is why the industry, social stakeholders, and visitors along the way will work together to become the world's most responsible Arctic destination.

THE AGENDA 2030 as a global action plan where the goals for societal transformation are integrated and indivisible. Region Norrbotten's sustainability efforts are based on the 2030 Agenda and defined by the extent to which different actors can contribute to achieving the goals - a contributing and responsible perspective. The 2030 Agenda is the outer framework of the hospitality sector's strategic roadmap.

OVERARCHING OBJECTIVES FOR THE DESTINATION

INTERVENTION AREAS. In the light of the scenario analysis, surveys, and Nordic, national and regional strategies, five strategic intervention areas have been identified and chosen for further work towards 2030. They are intertwined and interdependent - the destination's key stakeholders are responsible for increased interaction and work with an integrated approach in ongoing, parallel processes.

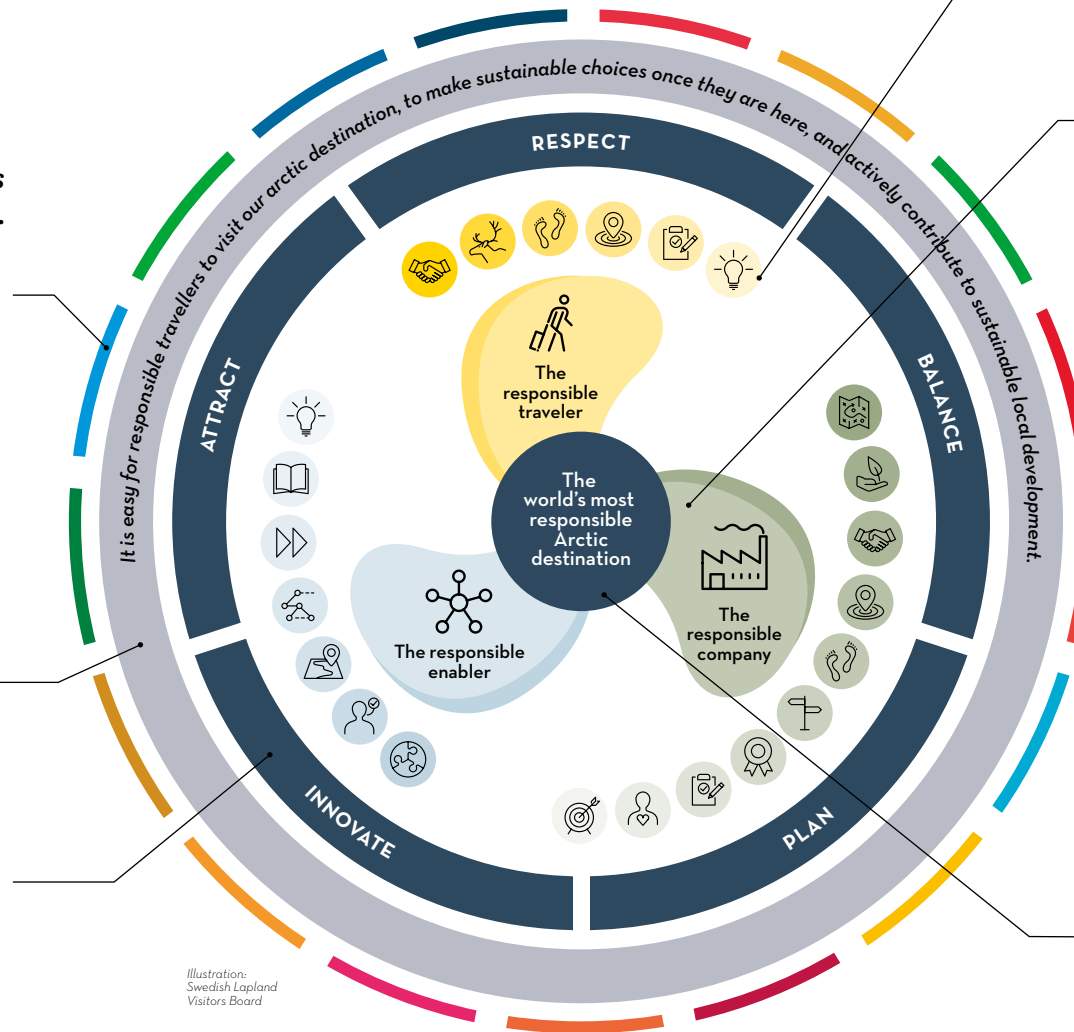


Illustration: Swedish Lapland Visitors Board

CARE FOR THE ARCTIC is an Arctic agenda that comes with a toolbox for the key stakeholders in a responsible destination. Care for the Arctic can be used as a practical method for actors to turn words into action in the continued pursuit of the 2030 Agenda's global goals.

THE DESTINATION'S KEY STAKEHOLDERS:

Progress towards the vision is propelled by:

- the potential traveller - those who visit the place
- the hospitality sector with its 12 sectors in the five areas: live, eat, do, shop and travel
- the destination's social actors as enablers and facilitators

THE RESPONSIBLE TRAVELLER. Travelling has both positive and negative effects. A responsible traveller plans ahead and makes active, informed choices.

THE RESPONSIBLE BUSINESS is motivated by a will to continually improve its activities in a sustainable and regenerative direction. A responsible company has a plan for how to help guests make sustainable and informed choices.

THE RESPONSIBLE ENABLER helps create the right conditions for responsible travellers and responsible businesses. Local, regional, national, and international social actors assume their share of responsibility in pursuit of the vision. Innovation, cooperation, mobilisation, and competence are crucial driving the transition forward.

THE VISION. With an ambition to contribute to the global goals, Norrbotten's hospitality sector strategy outlines a long-term vision: becoming the world's most responsible Arctic destination. As we strive towards this vision, the hospitality sector takes responsibility and plays an active role in fostering its own transition, and that of society.



References

Barcelona declaration of tourism and cultural heritage: "Better places to live, better places to visit". NECSTouR – the European Network of Regions for Competitive and Sustainable Tourism, 2018.

Best countries in the world Index. US News, 2023.

Besöksnäringens roll för regional utveckling. Ett nedslag i Jämtland Härjedalen. Jonsson, A. & Pettersson, R. Rapport. ETOUR, 2020.

Det turistiska fältet och dess aktörer. Josefina Syssner och Lars Kvarnström, 2013.

Earth beyond six of nine planetary boundaries. Science Advances 13 Sep 2023, Vol 9, Issue 37, DOI: 10.1126/sciadv.adh2458 Johan Rockström, Katherine Richardson.

Elbilar på frammarsch – prognos över framtidens fordonsflotta. Stockholms handelskammare, 2020.

En perfekt plats. Rapport från forskningsprogrammet Framtidens fysiska mötesplats. BFUF, 2020.

Ett land att besöka – En samlad politik för hållbar turism och växande besöksnäring. Regeringen.se, SOU 2017:9.

European Tourism Agenda 2030. EU, 2022.

EU:s gröna giv. Europeiska kommissionen, 2019.

Guide för ett smart samhälle. Utveckling av Internet of Things, datahantering och digitala tjänster. Sveriges kommuner och landsting, 2019.

Handbok för hållbar turismutveckling i världsarv och kulturmiljöer. Pub.nr.: 0371, Tillväxtverket, 2021.

Hållbar produktutveckling med fokus på natur- och kulturturism. Rapport Å2016-751, Tillväxtverket, 2020.

Hållbar utveckling i överturismens era. Cassinger, C. & Nilsson, J.-H., Artikel. Organisation & Samhälle, 2021.

Hur mår besöksnäringen i Norrbotten? Örtqvist, D. & Ejdemo, T., Luleå tekniska universitet. Rapportserie inom Regional förnyelse, 2017.

Innovation inom turism och besöksnäring – Utmaningar och möjligheter. Rapport 0443, Tillväxtverket, 2023.

Kommunerna och besöksnäringen. Sveriges kommuner och landsting, 2018.

Kompetensbehov mot 2030: När människa möter maskin i hotell- och restaurangbranschen. Kairos Future, 2017.

Linking the Indigenous Sami People with Regional Development in Sweden. OECD Rural Policy Reviews, OECD Publishing, Paris, 2019.

Loket – Klusteranalys för besöksnäringen i Swedish Lapland Sweco, 2020. swedishlaplandvisitorsboard.com

Mål: Cirkulär turismekonomi. Handbok inom cirkulär ekonomi för turismaktörer. Manniche, J., Topsø Larsen, K., Brandt Broegaard, R. & Holland, E. Centrum för regional- och turismforskning (CRT), 2017.

Målgruppsstrategi för besöksnäringen i Swedish Lapland. swedishlaplandvisitorsboard.com

Nationell strategi för hållbar regional utveckling i hela landet 2021–2030. Regeringen.se, Skr. 2020/21:133.

Nationellt ramverk och samverkansmodell för vandringsutveckling. Naturvårdsverket, 2023.

Nationell strategi för världsarvsarbetet. Riksantikvarieämbetet, 2019.

Nordic Tourism policy analysis. Rapport 2019:008. Nordiska ministerrådet.

Norrbottens klimat- och energistrategi 2020–2024. Med sikte mot 2045. Länsstyrelsen Norrbotten, 2019.

Norrbottens politiska plattform för Arktis. Region Norrbotten.

Nulägesanalys besöksnäringen i Swedish Lapland. Enkätundersökning, WSP & Swedish Lapland Visitors Board, 2019 & 2021. swedishlaplandvisitorsboard.com

Observerad klimatförändring i Sverige 1860–2021. SMHI, Semjon Schimanke, Magnus Joelsson, Sandra Andersson, Thomas Carlund, Lennart Wern, Sverker Hellström, Erik Kjellström, 2021.

Perspektiv på turism och resande. Begrepp för en kritisk turismanalys. Syssner, Gruber, Andersson, Pusk's, Bredström, Beckman, Brusman, Dahnstedt, Slavnic, Jonsson, Tovatt, Lundqvist, Khayati, 2018.

Pioneer the possible, kommunikationskoncept för att marknadsföra Svensk export och attrahera investeringar och talanger. Svenska Institutet, 2021.

Plan för nordiskt turismsamarbete 2019-2023. Nordiska Ministerrådet, 2019.

Planning for sustainable tourism in the Nordic region: Pan-Nordic analysis of Regional Tourism Strategies for rural areas Rapport 2021:18. Nordiska rådet & Nordiska ministerrådet.

Prognos för persontrafiken 2040 – Trafikverkets Basprognoser 2020-06-15. Trafikverket, 2020.

Regional utvecklingsstrategi för Norrbotten 2030. Region Norrbotten, 2019.

Rekommendationer för stärka besöksnäringen på landsbygden. Jordbruksverket, 2020.

Scenariorapport Swedish Lapland 2030. Kairos Future & Swedish Lapland Visitors Board, 2021. swedishlaplandvisitorsboard.com.

Strategi för hållbar turism och växande besöksnäring. Regeringen.se, 2021.

Strategi för Norrbottens regionala skogsprogram. Länsstyrelsen i Norrbotten, Skogsstyrelsen, Region Norrbotten, 2020.

Strategi Smart specialisering i Norrbotten. Region Norrbotten, 2020.

Strategy for International Branding of the Nordic Region 2022–2024. Nordregio, 2022.

Sveriges export- och investeringsstrategi. Regeringskansliet, 2019.

Sverige som resmål, varumärkesstrategi. Visit Sweden, 2022.

Sveriges strategi för den arktiska regionen. Regeringen.se, 2011.

Tillsammans för Norrbottens framtid. Åtgärdsprogram för miljö, energi och klimat 2018–2020. Naalisvaara, J., Henriksson, P. & Sardén, Y. Länsstyrelsen Norrbotten. Rapportserie nr 18/2018.

Tourism for SDGS a platform developed by UNWTO. tourism4sdgs.org

Tourism, nature and sustainability. A review of policy instruments in the Nordic countries. Nordiska Ministerrådet, 2018.

Tourism Transition Plan. Europeiska kommissionen, 2022.

Turistpolitiskt mål. Prop. 2004/05:56 utg.omr. 19, bet. 2004/05:NU13, rskr. 2004/05:296.

Utredning av status och trender rörande lokal och traditionell kunskap i Sverige. CBM:s skriftserie 39. Naptek, Centrum för biologisk mångfald, Uppsala. Tunón, H., Byström, M., Dahlström, A., Iwarsson, M. & C. Warmark. 2009.

Varumärkesstrategi för Sveriges arktiska resmål. swedishlaplandvisitorsboard.com

Veileder for besøksforvaltning i norske verneområder. M-415, Miljødirektoratet, 2015.

Verktøy for hållbar turism. Kartläggning och analys av hållbarhets- och kvalitetssystem för destinationer och företag. Rapport 0279. Tillväxtverket, 2019

Vägen till fossilfritt flyg 2045. Agerande, hinder och behov. Fossilfritt flyg 2045, 2021.

Vägledning Samplanering för Norrbottens utveckling. Regional strategisk samordning för hållbar tillväxt, 2020.



Co-funded by
the European Union



Swedish Lapland
Visitors Board



REGION
NORRBOTTEN