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The supply of nature-based tourism activities in Sweden

Abstract

After a long period of urbanisation and globalisation, the demand for nature and nature-based recreation and tourism in large part comes from metropolitan areas and from abroad. The development of nature-based tourism is encouraged by regional policy and development schemes. However the positive potential of nature-based tourism for regional development and rural entrepreneurship is contested. This encourages the identification of factors that may explain the success or failure of destinations and businesses focusing on nature based tourism products and how the supply of nature-based tourism activities coincide with domestic demand in Sweden with the aim to discuss the potential of nature-based tourism for socio-economic development. The question addressed is: what supply is there in terms of nature-based activities in Sweden? The paper is based on a survey of nature-based tourism supply on regional web pages in Sweden. The material indicates that supply and demand have difficulties to meet. From a supply-side perspective variations in accessibility and a lack of suitable products limit the possibility to actually make a living out of nature-based tourism. Hence, it is concluded that nature-based tourism is a viable development option only for few destinations.

Keywords:

economic potential; nature-based tourism; regional development; supply; Sweden

Introduction

Demand for nature-based tourism and recreation has increased during later years (Hall, Müller & Saarinen, 2009). Although the development of nature-based tourism is encouraged by regional policy and development schemes, the potential of nature-based tourism for regional development and rural entrepreneurship is contested because of lack of evidence in many contexts (Butler, Hall & Jenkins, 1996; Hall & Boyd, 2005a; Müller & Jansson, 2007). Although some areas attract tourists, research has shown that the economic impact of tourism does not only depend on how many tourists there are (Pouta, Neuvonen & Sievänen, 2006; Mehmetoglu, 2007). There are several other factors that are important for the impact of tourism on the local community. These can be grouped into factors related to the tourists and their demand and to the destinations and their supply, respectively (Pouta et al., 2006). Destinations focusing on nature-based tourism are often in relative remote locations in relation to the urban demand markets (Hall & Boyd, 2005b; Hall, 2007). Nevertheless, the sup-

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ply of nature-based tourism products is not necessarily evenly spread out over the area. Mountain and seaside areas are often more demanded landscapes than areas dominated by forest environments. Moreover, varying accessibility and relative location towards the urban demand markets give advantages to certain destinations and disadvantages to others (Hall, 2007). Additionally local variations in population and other socio-economic preconditions influence the local tourism supply (Müller & Jansson, 2007). This means that demand is not evenly distributed in relation to type and spatial structure of supply.

Tourist demand is also contingent to trip characteristics (Pouta et al., 2006). A tourist who has arranged his/her trip independently has other patterns of expenditures than someone who had everything arranged by an agency (Fredman, Boman, Lundmark & Mattsson, 2008a). Access to second homes increases the ability to visit amenity-rich areas, but decreases the likelihood to consume commercial tourism products (Hall & Müller, 2004; Sievänen, Pouta & Neuvonen, 2007). Moreover socio-economic factors as income and age affect the individual ability to consume nature-based tourism as well as the willingness to pay for nature-based tourism products (Pouta et al., 2006).

Outdoor activities supplied by tourism businesses are a growing part in an increasingly globalized tourism, and usually have clear regional and local characteristics, for example ecotourism. From this perspective, it is important to gain knowledge about the economic effects of nature-based tourism in the local economy. Tourism in Sweden has increased in general and the turnover in the Swedish tourism industry has grown by almost 45 percent since 1995 (account is taken of inflation). The turnover in Swedish tourism accounted for 191 billion SEK in 2005 and 2006 shows an increase of 11% to 215 billion SEK (Nutek, 2007).

The focus of this paper is on commercial nature-based tourism in Sweden. The purpose is to map the supply of nature-based tourism activities and to discuss the potential of nature-based tourism for socio-economic development in amenity-rich areas. The questions addressed are: what supply is there in terms of nature-based activities in Sweden? Furthermore, the potential of nature-based tourism to contribute to tourism sector growth and regional development in areas rich in natural amenities is brought forward. The research is based on a survey of nature-based tourism supply in Sweden as presented on the internet pages of regional tourism organizations. The remainder of the paper starts with a discussion of nature-based tourism and related activities, and then moves on to present the methodologies and results of the studies.

Definition and scope of nature-based tourism

Despite the position of nature-based tourism in regional policy discourses and scientific debate (Hall & Boyd, 2005a; Müller & Jansson, 2007), there is no universally accepted definition of nature-based tourism. Is all tourism taking place in natural environments nature-based tourism? The answer to this question is usually 'no', because tourism based on terrain-going vehicles like snowmobiles, four-wheel drives and motorcycles is not at all seen as outdoor recreation and thus not as nature-based tourism

either. This is, at least, applicable in a Swedish context and this idea is also embraced by the Swedish Environmental Protection Agency (SEPA) responsible for protected areas in the country and their tourism development. Hence, nature but even outdoor recreation has to be protected against the negative impact that is caused by motor vehicles. However, in case the tourists use their vehicles to get out into nature to pursue activities as ice-fishing the answer is not self-evident anymore. It could be argued that this case does not differ from nature-based tourists using the car to reach a nature area. Thus, the exclusion of motor vehicles appears to be ideologically motivated.

Sometimes it is argued that nature-based tourism has to be defined sociologically, based on the motives of the tourists (Mehmetoglu, 2007). To be considered a nature-tourist it is, consequently, not sufficient to visit natural areas. Instead, it is required that the motivation to visit a natural area is to experience nature or engage in nature-based activities. This position, however, invites criticism. A family hiking in the mountains would not qualify as nature tourists if their motivation is mainly social.

Other definitions of nature-based tourism are more pragmatic and do not depart from tourist motivations. Instead, they apply a geographical perspective putting focus on nature as an arena for tourist activities. Hall and Boyd (2005b, p. 3), for example, define nature-based tourism as "...tourism in natural setting (e.g. adventure tourism), tourism that focuses on specific elements of the natural environment (e.g. safari and wildlife tourism, nature tourism, marine tourism), and tourism that is developed in order to conserve or protect natural areas (e.g. ecotourism, national parks)." A similar definition is given by Newsome, Moore and Dowling (2002), who distinguish tourism in natural environments, tourism about the natural environment and tourism for the natural environment. The three categories of both definitions comprise, more or less, all tourism in natural areas, but they are applied from different perspectives. They depart from the geographical place, the tourism demand and, finally, from the tourism supply. It can, thus, be argued that they are mainly derived from economic-geographical thinking where natural areas are considered destinations commodified to cater for touristic consumption.

This article departs from the latter definitions. Thus, nature-based tourism in its widest sense incorporates all tourism that takes place in areas rich in natural amenities as well as activities connected to nature, including related concepts such as wilderness tourism, ecotourism and adventure tourism (Hall, 2009) and indigenous tourism, being a combination of both nature and culture tourism (Notzke, 1999). Moreover, it does not exclude motorized transportation to nature areas.

ECONOMIC DIMENSIONS OF NATURE-BASED TOURISM

Using this broad definition, however, most nature-based tourism falls outside of regular commercial activities unless undertaken as guided tours. Examples are such activities as walking in the forest, sunbathing, picking mushrooms and berries and bird watching. Although not contributing directly to activity based tourism businesses,

these tourists still contribute to the local economy. It is, therefore, difficult to estimate the economic value of nature for tourism.

Nature is cited by foreign visitors as the most important reason for choosing Finland as their travel destination accounting for around 20 per cent of the total turnover of foreign tourism on national level (Rinne & Saastamoinen, 2005). A modest estimation of the economic value of nature-based tourism in Sweden is around 2.5 million € (Fredman et al., 2008a), based on visitor attractions in the country and, thus, not including several important tourism segments such as second home tourism, fishing and hunting.

Another definitional problem regards the interrelationship between nature-based tourism and outdoor recreation. In the Nordic tradition the ideological origin of outdoor recreation is to be found in peoples' movements and thus, they are highly anti-commercial (Sandell & Sörlin, 2000). Meanwhile, tourism has been reduced to a purely commercial activity. This applies, in particular, to the political discourse and, in Sweden, it is also manifested in a shift of responsibility from the Ministry of Social Affairs to the Ministry of Economy and Trade. From a tourism-geographical perspective, however, the distinction between commercial and non-commercial is rather obsolete since focus is on human mobility, its motivations and consequences. From that perspective people involved in traditional outdoor recreation can be considered tourists as soon as they pursue their activity outside their everyday environment (www.unwto.org). Applying a supply perspective, however, nature-based tourism products can be defined as a form of commercially organized outdoor recreation activities (see Fredman et al., 2008a).

This definition introduces the need for further distinction as to whether to define tourism from a supply or a demand-side perspective (Smith, 1995). It can be argued that tourism entrepreneurs are not interested in whether their customers are 'true' tourists that have travelled 'sufficiently' to be considered tourists. If focus is on regional development it is thus reasonable to depart from a perspective that highlights the supply-side organized by tourism businesses. However, to provide a comprehensive picture of nature-based tourism it is necessary to cover the demand-side too. This is, however, not the objective of this paper, which instead is mainly interested in the business side of nature-based tourism.

THE PLACE FOR NATURE-BASED TOURISM

The above argument indicates that natural areas are the primary places for nature-based tourism. This statement may appear self-evident but recent development of activities closely related to sports, such as climbing and skiing, contest this assumption. Hultman and Gössling (2008) state, for example, that the increasing commodification of nature experiences weakens their relation to place. Instead, it facilitates indoor arenas and artificial environments to exercise skiing far away from winter climate and mountain areas. Similarly, climbing is increasingly undertaken on artificial walls

in urban environments. Nevertheless, this development does not necessarily entail a decreasing interest in nature-based tourism. Instead, Bourdeau, Corneloup and Mao (2004) conclude, with respect to the French Alps, that outdoor recreation, in fact, experienced rejuvenation owing to the urbanization of traditional outdoor recreation activities. The development implies, however, a sportification and individualization of outdoor recreation and an inclusion of competitive aspects.

Generally, there is a great acceptance that natural areas are an important attraction for tourists (Jansson, 1994). Nature can obviously have different meanings and, hence, even nature-based tourism can have varying meanings for tourists. It is, however, obvious that northern Europe is perceived and constructed as natural area and wilderness by people in other countries (Fredman et al., 2006; Gössling & Hultman, 2006). Also, the marketing on the regional, national, and international level highlights northern Europe's richness of natural areas and uses the category to lure tourists to the northern destinations. Statistics for Sweden reinforce the picture. Using protected areas as measurement of naturalness, 50% of the population has access to a protected natural area within 5km and a total scope of protected natural areas is 2,5km² within 20km from home, which is outstanding in Europe (Ansén, 2000).

Although it is traditionally associated with mountains and forest environments, nature-based tourism does not require protected areas or particular ecosystems. The sea and the outskirts of urban areas offer plentiful opportunities for nature-based tourism. Higham and Lück (2002) argue, for example, that urban ecotourism, despite its inherent contradictions, can provide true ecotourism experiences that also meet the ideological demands often associated with ecotourism since transportation becomes obsolete. The definitions of nature-based tourism discussed above do not exclude urban tourism. It still can focus on specific natural phenomenon such as birdlife, or be organised to create greater understanding for flora and fauna within the urban arena. However, from a geographical perspective it appears reasonable to exclude urban nature-based tourism since urban areas seldom include larger natural areas but, instead, feature parks.

The preconditions for nature-based tourism vary over geographical space. Hall (2007) states that natural areas in peripheries tend to be experienced as more 'natural' and less arranged. The increasing 'naturalness', however, does not necessarily bring about more tourism to peripheral natural areas. Distance decay caused by economic and temporal costs implies that only few, in fact, travel to peripheral areas to experience nature. Furthermore, distance also means that there are other destinations, offering so called intervening opportunities, closer to demand. They supply a similar product, further diminishing the demand for the peripheries (Lundmark, 2006). Despite this locational disadvantage peripheral areas have promoted tourism as a tool for development. Hall (2007) argues that this is because of a lack of alternative development options within the peripheral areas.

Protected areas, in particular, play an important role in the peripheral tourism product in other countries (Butler & Boyd, 2000; Eagles & McCool, 2002). In the Swedish context, this development has been recognized in the governmental directives to the Swedish Environmental Protection Agency (SEPA), requiring that nature protection should contribute to regional growth (Miljödepartementet, 2007). Development in national parks and nature reserves is a way of achieving this target. The Swedish planning system also designate areas of national interest for outdoor recreation. To what extent these areas are used for this purpose can be questioned (Almstedt, 1998; Lundmark & Stjernström, 2009). Large national parks that are considered an important resource for tourism development in peripheral areas of northern Europe are increasingly expected to function as adventure playground for tourists from all over the world (Pedersen & Viken, 1996). According to Hall and Page (2002, p. 259), these areas should fulfill one or more of the following aspirations related to wilderness experiences: aesthetic appreciation; religious aspirations; escapism; challenging physical skills; romantic ideas related to heritage; solitude; companionship and learning.

TOURISM BUSINESSES

The importance of tourism for some local labor markets is high, especially in peripheries that lack other development options (Müller & Ulrich, 2007). Tourism development has, thus, been seen as a tool for sustaining peripheral communities during economic restructuring (Hall & Jenkins, 1998; Hall, 2007; Jenkins, Hall & Troughton, 1998). Still, tourism is not a new activity in these peripheral areas. The changes in the context of restructuring meant, however, a greater pressure to develop commercial tourism products. The traditional non-commercial outdoor recreation, thus, appears to be of no greater value anymore and, in the public debate, it is consecutively substituted by nature-based tourism. To develop nature-based tourism in the Swedish context has, however, turned to be a difficult task since the Public Right of Access or 'the right to roam' grants admission to natural areas to everyone and, therefore, limits the possibility to establish commercial products (Lundmark, 2006; Müller & Jansson, 2007).

International experiences demonstrate that entrepreneurs in nature-based tourism are usually small-scale (Roberts & Hall, 2001; Hall & Boyd, 2005a). Lifestyle-entrepreneurship dominates and sometimes implies a lack of professionalism and interest in growth. Moreover, lacking access to resources also constraints the market presence of small-scale businesses. Nevertheless, large-scale entrepreneurship may accompany the patchwork of small-scaled companies.

In the Swedish context, Skistar and Strömman are two major companies active in nature based tourism, focusing not only on alpine skiing. Moreover, Sveaskog, the company managing state forests has recently invested in developing nature-based tourism, indicating that nature-based tourism is considered an industry with commercial potential. Another initiative with the aim of promoting ecotourism has been launched by the Swedish Ecotourism Society and the Swedish Society for Nature Conservation and has been supported by the Swedish government. A common brand, Nature's Best, has

been coined and allows certified companies to join promotional activities, for example, on a web page (www.naturesbasta.se) (Fredman et al., 2006). In 2008, almost 80 tour operators had met the criteria developed by the brand organization. The geographical distribution of companies demonstrates the role of peripheral areas for nature-based tourism. There is also a large difference in turnover among these companies. The highest turnover is in Dalarna, Gävleborg, Värmland and Örebro County (Fredman et al., 2008a). Of this amount, however, only a small proportion comes from certified activities and, of these 10 largest account for almost 80% of the total turnover of about 160 million SEK (Fredman et al., 2008a).

DEMAND FOR NATURE-BASED TOURISM IN SWEDEN

Currently tourist demand for nature-based tourism activities in Sweden is rather unknown. For example, in a recent attempt to model domestic tourism flows in Sweden nature-based tourism was disqualified owing to the low number of observations in the available database (Lundgren, Lundevaller & Müller, 2006). A hint is given by a recent survey on outdoor recreation in Sweden. Accordingly, a majority of people use weekends and longer leaves for engaging in outdoor recreation (Fredman et al., 2008c). A major constraint for not engaging more is time. Moreover, although the authors realize a greater willingness to pay for outdoor recreation (Fredman et al., 2008b), the total demand appears to be limited.

These results indicate that nature-based tourism businesses should have difficulties to become profitable, at least considering the Swedish demand market. Particularly, businesses in remote areas should expect seasonal demand only. However, a shortcoming in all empirical assessments of nature-based tourism in Sweden is the neglecting of international demand markets (Fredman et al., 2006). High survey costs and challenges regarding data collection have so far hindered any serious attempt to reveal a comprehensive picture of this market segment.

Method and material

This study is based on a survey covering the supply-side of nature based tourism activities. The supply is assessed on a national level addressing quantity, activities and geography through a survey of the homepages of Swedish regional tourism organizations. A total of 4862 supply activities have been included. A limitation of the study is the focus on activities. Accommodation and transportation are not included.

Today, no comprehensive information on nature-based tourism supply in Sweden is available. This is mainly because of the small scale and the poor organisational status of the sector. Even web portals, like Nature's Best and inatur.se, contain only fractions of the total supply of nature-based tourism in Sweden. The data of commercial nature-based tourism in Sweden is thus based on a survey of web pages presented by the regional tourism organizations in Sweden between March and June 2008. A justification for this approach is the growing importance of internet in tourist s' search for information and reservations (Buhalis & Laws, 2001). The guiding principle for the study was to take the position of the information seeking tourists.

After an initial survey of the selected web pages, three categories were used to classify the varying supply: bath & boat, hunting & fishing, and nature experiences. For the two northernmost counties of Sweden Sami tourism was included as a special category.

The categories thus offer a common denominator for the classifications used on the regional web pages. The unit of measurement was distinct product supplies. Sub-categories were chosen and ordered under the main categories according to the key words featured on the regional web pages. The regional web pages listed then specific products under each key word heading. In some cases key words did not clearly coincide with main categories. For example, guided tours can refer to both, hunting & fishing or nature experiences, respectively. Here, classification was made based on the factual content of the web page. Only commercial supplies were included in the survey. Products offering only accommodation, fishing licences and bicycle rentals were excluded since these are present almost everywhere. The remaining categories contained, therefore, the following key-words:

- Bath & boat: boat and canoe renting, boat trips, yachting, diving, windsurfing etc.
- Hunting & fishing: hunting, fishing trips, guided tours, adventure etc.
- Nature experiences: nature, riding, guided tours, skiing, hiking etc.

The quality of the web pages varied considerably, which can be explained in a number of ways. Regional tourism organizations can select certain products, which makes other products invisible. Tourism entrepreneurs, on the other hand, can neglect the regional web pages. Also, the indexation of web pages can have influence on the visibility of certain products. Certainly, there are shortcomings on the regional tourism organizations' web pages, partly because of updates. Companies that are listed on the Nature's Best webpage were not accessible through the regional web pages. Nevertheless, this is the reality that an information seeking tourist meets and hence, it was accepted within the framework of this study, which mainly provides a snapshot of the nature-tourism supply in Sweden during spring 2008.

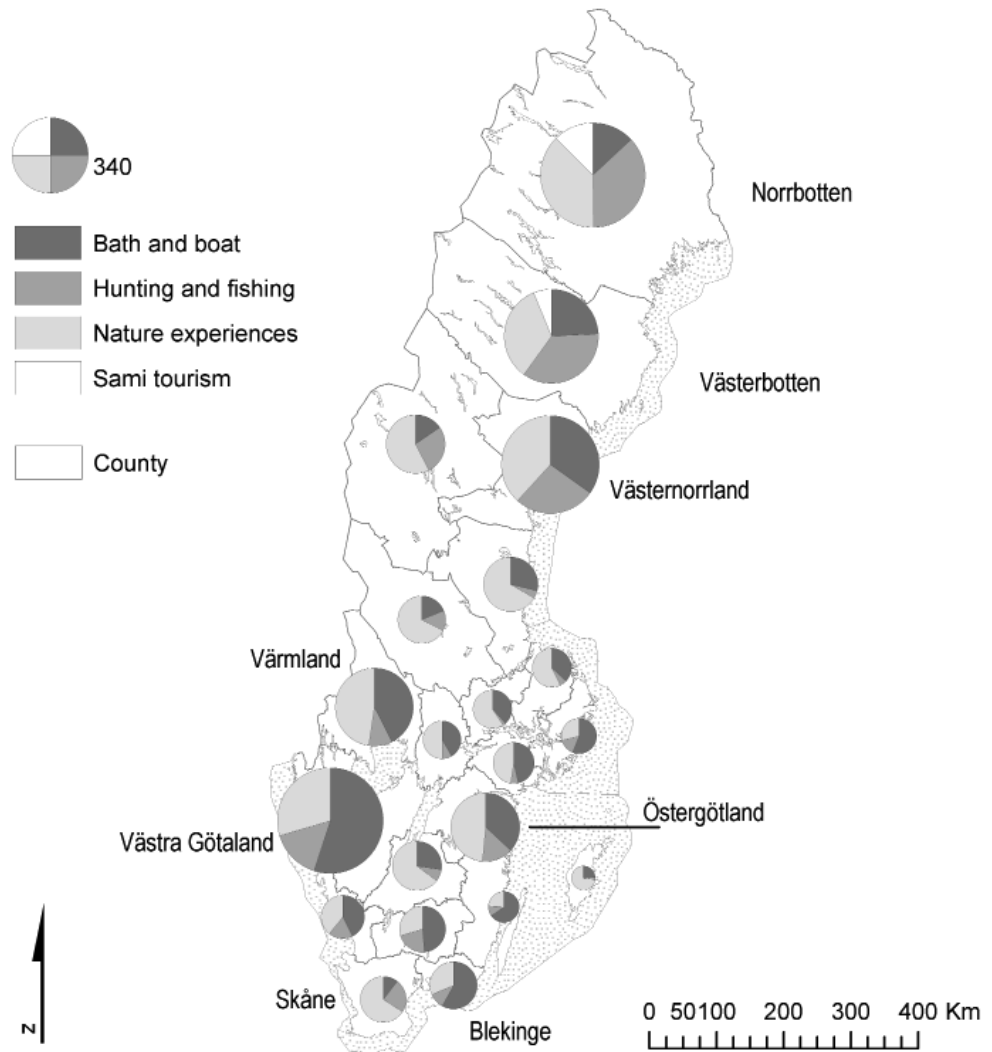
Results and discussion

Altogether 4862 products were registered. The majority (43%) relate to land-based nature experiences. Water-based activities and hunting & fishing accounted to 34% and 21% respectively. The remaining 2% represent Sami tourism activities in the two northernmost counties in Sweden. The supply presented on the regional tourism organizations' web pages varies considerably (Fig. 1). Water-based activities are more frequent in southern Sweden, while hunting & fishing is a more common product in the north.

The survey indicates clearly that the northern and peripheral counties have a greater internet presence. Even the western counties and the counties of Östergötland and Blekinge offer a great number of products. This reinforces the theoretical argument presented earlier, highlighting the interrelationship between distance and supply. Destinations of national significance offer also a significant amount of products if focus is

on the municipal level. However, it is also obvious that some destinations, for example, the skiing resort of Sälen and the island of Öland, do not cooperate with the regional tourism organizations in presenting their supply on the common web page. They may, however, choose other channels for promotional activities not surveyed in this study.

Figure 1
REGIONAL NATURE-BASED TOURISM SUPPLY IN SWEDEN

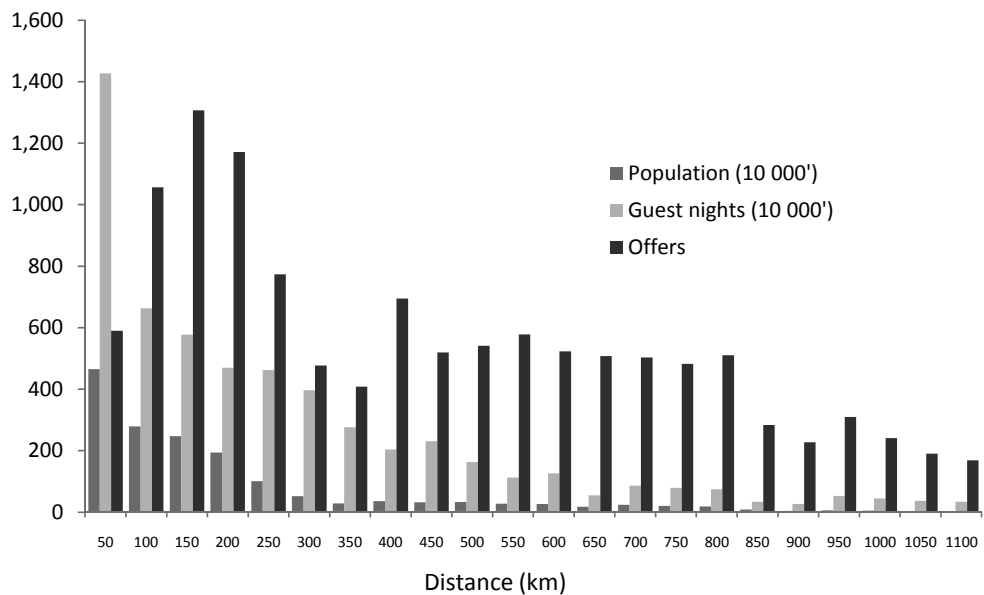


A statistical analysis was not able to detect a clear relationship between supply and the amount of commercial overnight stays registered for each municipality. Hence, the internet presentations alone cannot explain why certain municipalities are more successful in attracting visitors than others. This is reasonable since the existing supply does not guarantee demand. Moreover, Statistics Sweden's data on commercial overnight stays does not cover touristic motives sufficiently and hence, it is not possible to filter out nature-based tourism. Even more, local nature-based tourism is not covered in the data. However, there is no clear relationship between supply and regional population

figures either, which indicates that supply targets incoming tourism. It is, however, obvious that the counties of Västernorrland, Värmland and Västerbotten offer greater supply than could be expected from the relatively small population numbers.

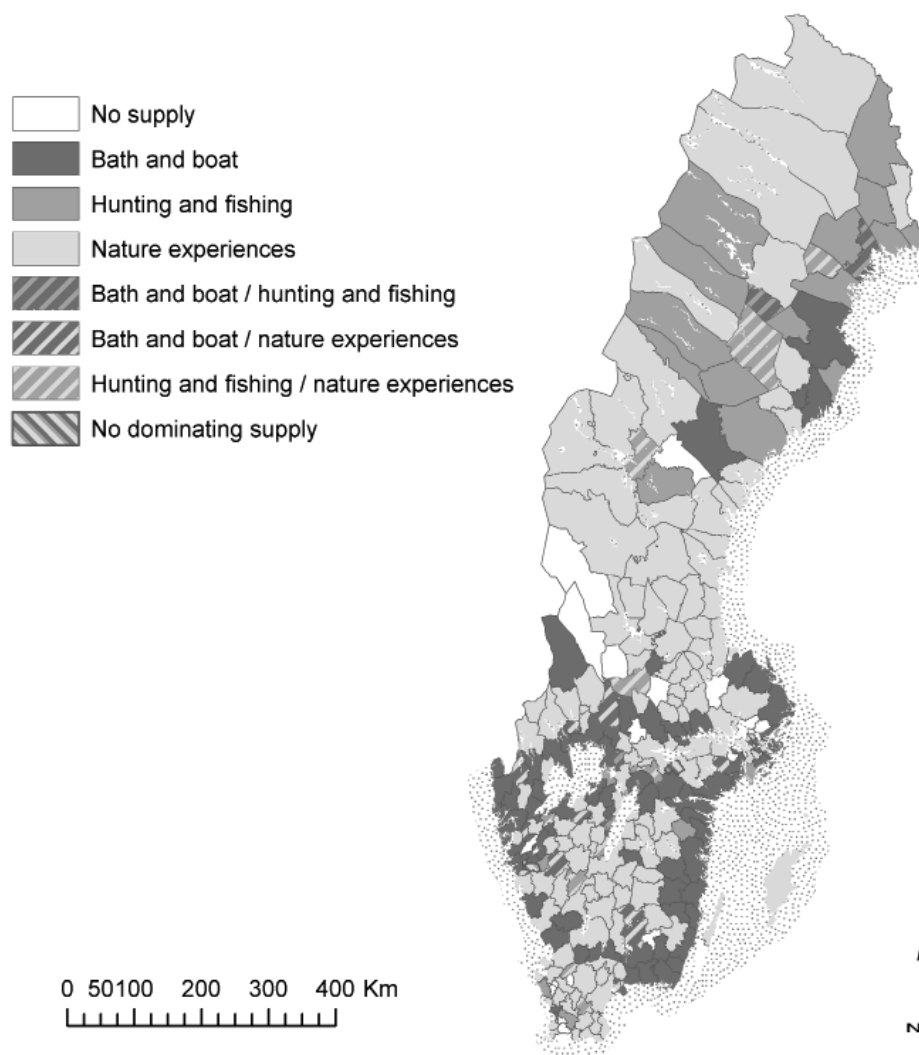
The regional mismatch of supply and potential demand can also be seen when analyzing the distribution of nature-based tourism supply in relation to the three main demand markets - Stockholm, Gothenburg and Malmö (Fig. 2). Although there is a considerable supply close-by, it reaches a peak about 100 to 150km from the urban areas. This supply obviously caters for the urban population and their weekend demand. From 300km and further away the absolute numbers of supply do not decrease dramatically despite the steady decline in population figures and guest nights. Beyond 800km even supply declines, but the area covered is located north of the Arctic Circle only and forms, thus, an extreme periphery. The mapped patterns indicate, for large parts, and not least the northern parts of the country, a supply that cannot meet any weekend demand. Population figures within adjacent zones are very limited and thus, the nature-based tourism companies in the northern periphery are likely to be dependent on demand occurring during longer leaves.

Figure 2
DOMINATING NATURE-TOURISM SUPPLY



Variations in nature-based tourism supply become pertinent when only the dominating supply categories are scrutinized (Fig. 3). The category bath & boat, not only containing canoeing and other water-based activities, dominates to a high degree in southern Sweden's coastal municipalities as well as in Värmland, Västmanland and Östergötland. Some municipalities, even in northern Sweden, fit into this category. Hunting and fishing dominates in eastern Norrbotten and in large parts of Västerbotten in northern Sweden as well as in Skåne in the far south. Otherwise, only few municipalities outside these counties seem to specialize in this kind of nature-based tourism. More unspecified nature experiences dominate in the remaining municipalities.

Figure 3
DOMINATING NATURE-BASED TOURISM SUPPLY
MUNICIPAL LEVEL 2008



Protected nature is, as discussed earlier, often considered an important asset for nature-based tourism development. Empirically it is, however, not possible to establish a relationship between access to protected areas and commercial nature-based tourism. Certainly, many of the municipalities that include a great share of protected areas have a high number of commercial products but, at the same time, access to protected areas does not seem to be an important precondition for nature-based tourism supply. It is, thus, possible to conclude that it is not the amount of protected nature that influences the supply of commercial nature-based tourism positively or negatively.

In summary it can be said that commercial nature-based tourism activities in Sweden obviously are available in the entire country, but peripheral areas tend to profile stronger in nature-based tourism. The development of commercial nature-based tourism

activities is obviously dependent on many factors, which make the situation complex. Accessibility and competing industries are only two factors that may explain the regional variations in nature-based tourism products.

Discussion and conclusion

The potential for nature-based tourism activities to contribute to economic growth and regional development is dependent on several interrelated factors. The number of tourists is only one of these. Factors related to the tourists and their demand and to the destinations and their supply are also important. Destinations focusing on nature-based tourism are often in relative remote locations in relation to the urban demand markets (Hall & Boyd, 2005b; Hall, 2007). An increasing urbanization into the major metropolitan areas thus challenges the future opportunities for nature-based tourism, at least regarding domestic demand.

The concentration of population on the one side, and the potential for nature-based tourism development in peripheral areas on the other side, are difficult to combine. The demand is concentrated and changing in character while supply is dispersed. This might lead to different development scenario, where the outdoor recreation in the proximity of urban areas are being developed into nature-based tourism destinations for an increasingly urban population demanding sportified tourism products in a safe nature environment. The dependence on protected and natural areas in proximity to urban locations would decrease because the development of facilities that imitate and facilitate access to genuine outdoor recreation is more viable to develop in terms of economic output. This has consequences for the peripheral areas trying to develop a product that is partly based on conflicting ideas of nature and outdoor recreation, where the idea is to sell the unexploited values of nature. However, there is also an alternative scenario where increased environmental awareness attracts international tourism to exotic locations in peripheral areas and where nature itself is the attraction, not the activities that are offered.

Although there is a willingness to travel to and pay for nature-based tourism activities among a limited group of Swedes, it is obvious that the scope of this group will not be sufficient to meet all supply, particularly since demand not necessarily targets domestic supply only. Hence, policies aiming at using nature-based tourism as tool for regional development are becoming less likely to succeed. The future of nature-based tourism supply in Sweden should therefore not only be based on domestic demand. Instead, it is mandatory to focus on incoming tourism. This requires hospitality skills and product quality that enable a successful competition on an international market. To what extent this is already achieved is outside the scope of this article.

The potential for peripheral areas to create regional development through nature-based tourism thus varies and is strongly dependent on factors that cannot be influenced by the entrepreneurs, the regions or even the national policy in some respects. Issues of how supply and demand will change in the future may, for example, be connected to

whether demand will increase if the focus on environmental concerns will continue. This, in turn, is strongly connected to questions regarding effects on supply and demand of climate change. Furthermore, will the potential for nature-based tourism products be reduced or increased in the future as the population distribution (further urbanisation) and population characteristics in terms of age and nationality change? Also, if supply is met locally, this opens up new questions about who the tourists are: are the majority of the tourists from other regions in Sweden or are they 'local' visitors? For peripheral regions the latter case implies that increasing tourism can only be achieved through inbound tourism.

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