The supply of nature-based tourism in Sweden. A national inventory of service providers

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This paper provides a descriptive overview of a national inventory of nature-based tourism (NBT) service providers in Sweden. In order to obtain a representative sample a "geographical distribution" approach was used based on the cooperation of regional tourist bureaus. As a result, contact information of 2060 service providers was received. Following two non-response check-ups and a screening question the effective sample was 1821 and the follow-up web survey resulted in 648 valid responses.

Background

Sweden, having a strong tradition and long history of outdoor recreation, has experienced a relatively recent expansion of nature-based tourism (NBT) as a commercial activity. Given the richness in natural resources Sweden should be well positioned to develop nature-based tourism (NBT). Existence of natural resources is, however, not the only criterion for successful tourism development. As pointed out by Fredman and Lundmark (2008), Lundmark and Müller (2010), Fredman, Lundberg and Wall Reinius (2014) and others, access to resources, infrastructure, professional networks, competence, social and economic capital also matters to a large extent.

Little has been known through systematic data collection and research about the supply side of NBT, comparing to the demand (Fredman & Tyrväinen, 2010). Two main reasons for the lack of statistics in the NBT sector have been the absence of inventories, based on common definitions and the inadequate design of the industry classification system. The purpose of the study was to address this issue and do a complete inventory of NBT service providers for the entire country. This is to our knowledge the most comprehensive inventory ever done on the NBT supply in Sweden, which, hopefully, will serve the objective to provide an up-to-date description of this sector.

Survey method

The sample for the survey relied on the information provided by 308 regional tourist bureaus located all over the country. The tourist bureaus were contacted via telephone and asked to provide contact information of the NBT companies in the region. As a definition of NBT, the definition suggested by Fredman et al. (2009) was adopted, where NBT implies activities occurring when visiting nature areas outside the person's ordinary neighbourhood. Based on the responses of the tourist bureaus and supplementary Internet check, a sample of 2060 NBT companies was collected.

To the collected sample of NBT companies, a comprehensive questionnaire was distributed. The questionnaire consisted of 7 sections. Section 1 contained questions regarding general profile of a company, type of services provided, organizational characteristics of a company, geographical distribution. Section 2 aimed to acquire information on the issues of land use and access to nature, such as the type of land ownership most important for the business operations, opinion of the respondents on the impact of other land users, the role of the Right of Public Access, National Parks and the importance of various types of nature for their NBT business. Section 3 asked questions regarding the measures of sustainable development within a given NBT company. Section 4 aimed to capture economic characteristics of the company, such as the number of the employees, annual turnover and seasonality. Section 5 included questions on market characteristics. Section 6 inquires about the importance of formal and informal networks. Section 7 concluded with the background and demographic information of the respondent.

The survey was distributed online to the email addresses of the NBT companies using NETIGATE online survey software in two rounds (May-June 2013 and November-December 2013).

Results

As a result of the survey distribution, there were in total 648 responses collected (35,5% response rate). Some key highlights from the survey results can be summarized as follows:

The general impression from the results is that NBT is a rather diversified sector, which relies on multiple business operations. Only about 20 % of the companies have 100 % of their annual sales from NBT. There are a small number of large and a large number of small NBT service providers in terms of annual sales. Just over 60 % of the companies reports at least one full time year round employment while 40 % have at least one part time year round employment working with NBT operations.

The supply of NBT in Sweden revolves around different types of water based activities to a large extent when measured vis-à-vis importance to annual sales. It is also a summer business – between 60-80 % of all respondents ranked the months June-September as the most important season. Guided activities in nature and accommodation are ranked as the most important business activities while fishing, kayaking, canoeing and/or rafting are the most important recreation activities.

Future growth of the Swedish NBT sector is likely. While 37 % of the companies classified themselves as being in a growth phase and 6 % in start-up, only 8 % were in recession and 2 % in liquidation. The majority of the companies are dependent on access to land with an external ownership. The freedom to roam in nature is very important to three-quarters of all respondents while only 4 % think this opportunity is of no importance at all. Hiking trails and cabins are the most important types of infrastructure.

The three most important nature environments for NBT operations in Sweden are forests, lakes, rivers and waterfalls. Hydroelectric dams, wind power plants and forestry are among the most negatively perceived by the companies in this study. Looking at the importance of different wildlife we find that fish, birds and moose are the most important. Only about 14 % of the companies report activities within or in the 5 km range from a National Park.

The majority of the sales are from the private market segment. On average, about 14 % of the companies report heavy reliance (proportion of 80-100%) on customers from the same county where the company is registered. In contrast, only about 5 % report the same reliance on customers from Sweden outside the county where the company is registered. Finally, 17 % report similar proportion of customers from countries other than Sweden (international customers). The most important foreign markets are Germany, Denmark, the Netherlands and Norway.

Almost half of all respondents worked in another non-service company immediately prior to starting/getting employed by the current NBT company. Only one third worked in another service or tourist company.

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