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Ethical Tourism Recovery in
Arctic Communities

ETRAC Strategy and Survey Findings

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ETRAC STRATEGY

INTRODUCTION

Following the ETRAC Report on 'Impacts of COVID on the Development of Ethical Tourism', further research and engagement sought to develop a practical strategy for future action in the sector. This research, conducted in line with the methodology outlined below, comprises four interconnected pillars. Through acting upon these areas, various stakeholders can work towards an ethical tourism recovery and seek to improve and enhance ethical tourism practice in the future.

METHODOLOGY

This research builds predominantly on the report on 'Impacts of COVID on the Development of Ethical Tourism'. These documents may be read together or separately, but for more information on the wider project methodology, please refer to the report.

The data informing this strategy was gathered via three routes:

- First, the report on 'Impacts of COVID on the Development of Ethical Tourism' was consulted in order to identify themes and details identified during the course of the research which may be relevant to a forward-facing strategy document;
- A stakeholder workshop was then hosted in February 2022, bringing together a range of voices to discuss and debate these themes, seeking to identify specific actions which could be undertaken. These discussions were then analysed and developed into tentative actions;
- Fifteen participants attended the workshop, representing six countries across the Northern Periphery and Arctic region: Finland, Sweden, Scotland, Iceland, Greenland and Canada. Attendees represented a broad range of perspectives and sectors, including universities and research institutions, tourism business networks, Destination Management Organisations (DMOs), tourism providers and regional development organisations.
- Tentative actions were subsequently circulated around relevant researchers and other stakeholders to consider their representativeness and relevance. Research partners were also asked to contribute case study illustrations to the 'pillars', offering a practical insight into how such objectives may be translated in reality.

The strategy is structured into four pillars, each setting out the main aim and specific actions. For each pillar there is a case study, illustrating an occasion where each aim has been approached in practice. These case studies are offered as illustrative examples through which greater understanding can be gained, rather than a specific recommendation or guideline for implementation elsewhere.

STRATEGY FOR ETHICAL TOURISM RECOVERY

Pillar 1: Network development

There was an identified need for strong peer-to-peer interaction between businesses and communities engaged in ethical tourism recovery. DMOs should take the lead in initiating and/or (further) developing local networks.

- a. Each network can facilitate interaction involving businesses which may be in competition within or between areas, for mutual benefit. Such a network can then work together to share knowledge and best practice on areas such as product development, marketing and joint tourism packages for mutual benefit.
- b. Simultaneously, the governance of the network can elicit the views and opinions of members, businesses and community groups, to understand needs and take the appropriate actions with regard to next steps.
- c. There remains a need for targeted training and support for tourism providers, necessitating strong leadership from DMOs and membership bodies in providing, facilitating and promoting formal training opportunities within each network. This may require a preliminary stage of upskilling less developed or capable SMEs or community groups to the point of being able to benefit from these opportunities.
- d. Finally, moving beyond DMO-administered networks, it may be beneficial to develop non-local (national/international) peer-to-peer networks around ethical and community-led tourism to share support, collaboration, best practice and develop broader understanding of standards in the sector.

Sustainable travel networking in North Karelia, Finland

As the Destination Management Organisation (DMO) of North Karelia (Finland), Visit Karelia aims to reach the national Sustainable Travel Finland (STF) certificate in the coming years. The STF certificate, launched by Visit Finland, requires that 50% of the companies in the region should have achieved the certificate. Visit Karelia has had a strong role to engage regional tourism companies towards a path toward sustainability. The work has started by organizing regular networking and training events. A joint will for sustainability work has been achieved and already now eight companies have been rewarded with the label. One of the companies – a DMC Äksyt Ämmät Green Finn Tour Operator – is one of the sustainability pioneers in the region. It is located in the middle of the wilderness and organizes nature-based experiences as skiing tours in forests combined with delicious Karelian food. Another example is a city centre based Lietsu Boutique Aparthotel in Joensuu, which has concentrated on promoting the responsibility in wide manner considering both the ecological, social and cultural aspects of the sustainability. Both companies have also been very active in sharing their knowledge and best practices, and collaborating with other companies in the region e.g. in terms of creating joint tourism products.

Pillar 2: National policy and infrastructure

There are structural issues affecting tourism recovery, especially in rural and remote communities, which require interventions from government and/or public sector agencies, or the broader scientific tourism industry:

- e. A shortage of available affordable housing, exacerbated by holiday lets and second-home ownership, is contributing to unsustainable depopulation and constraining the ability of tourism businesses to recruit and retain employees. In order to tackle this

- f. issue, policy interventions are needed to place limits or restrictions on such usage and enable communities to play a larger role in the ownership and allocation of housing.
- g. Inadequate internet infrastructure is constraining the ability of some tourism businesses to take advantage of new opportunities in terms of online networking, marketing, product development and training/learning. Immediate investment in internet infrastructure is required in order to bridge the 'digital divide' and provide new opportunities in rural areas.
- h. Recruitment and retention of tourism and hospitality staff is challenging, due both to the aforementioned shortages in affordable accommodation, as well as the poor reputation of the industry with regard to pay, working practices and precarity of employment. Incentives for new employees in the sector could include support for people to return home to their communities, or through standards and guidelines in working practices to improve the reputation of the sector.

Regulation of short-term housing lets in the Highlands of Scotland

The growth and ease of platforms such as AirBnB and Vrbo has led to increasing numbers of domestic properties being let out for short-term accommodation. In the Scottish Highlands and Islands region, this trend has led to a marked reduction in available and affordable homes for local people, exacerbating rural outmigration and threatening community sustainability. Simultaneously, it reduces available accommodation for seasonal employees in the tourism hospitality industries, restricting the ability for businesses to recruit staff. In response, in 2022 the Scottish Government introduced new legislation to allow local councils to designate 'Short-term Let Control Areas' to regulate the number of such properties in any one area. Highland Council, which plays host to an estimated 10,000 such premises, is pursuing designations in certain areas with particularly high or unsustainable numbers of short-term lets, such as Badenoch and Strathspey within the Cairngorms National Park. Through this process of 'licensing' short-term lets, the council seeks to balance the needs of the short-term letting industry with those of local communities and other tourism businesses.

Pillar 3: Changing tourist behaviour

In order to encourage an ethical tourism recovery which does not create an unsustainable burden on local people or the environment, and shares financial benefits around multiple locations, tourist behaviour needs to change. Incorporating communities, businesses, DMOs and local/municipal councils, a new approach needs to:

- i. Provide information to tourists who may be unfamiliar with a new form of tourism (e.g. outdoor/nature-based tourism) on etiquette and practices which do not harm people and/or nature, and do not present a risk to themselves or others.
- j. Provide guidance on the location, availability and use of facilities and infrastructure, while encouraging their responsible use. Ensure that this information is widely and readily available both locally and online in a format accessible for users on mobile phones.
- k. Adopt a strategic and collaborative approach to preventing and tackling large-scale and unsustainable tourism. This may include promoting other locations, or new routes, to encourage people to visit less well-known sites, or even (in extreme cases) limiting visitor numbers.
- l. Finally, the ethical tourism sector needs to proactively develop and provide ethical and responsible tourism experiences/products and encourage their take-up. While on the demand-side, this will require promotion and marketing of the concept of ethical tourism, on the supply-side it will need to be developed through the encouragement of communities and businesses to engage with the sector, as well as clustering and/or

- m. collaboration between businesses and broader collaborative engagement of local authorities and DMOs, for ethical tourism recovery.

Case AECO community guidelines

Twelve local communities in Greenland, Canada, Norway and Iceland have created their own community guidelines for visitors in the Arctic communities by utilising the template created by AECO (the Association of Arctic Expedition Cruise Operators). These community-specific guidelines work in addition to general guidelines, in order to better meet each community's needs. The aim of these guidelines is to instruct visitors how to behave during the visit. The process of setting up the guidelines starts from the local community and is strongly encouraged to be inclusive to local tourism stakeholders and anyone that has something to say. The process does not necessarily take much work and could be set up in a couple of meetings as long as an agreement is found. In case there are special issues in the community among others with waste management or vulnerable, protected nature, these issues should be included in the guidelines. For example, in Sisimiut community guidelines, visitors are advised to keep a respectful distance to remains. In Nuuk community guidelines, visitors are asked to respect the local tradition of flensing a seal and not to pick flowers from nature. For more information, please visit: <https://www.aeco.no/guidelines/community-guidelines/>

Pillar 4: Local strategic approaches

Collaborative approaches must be adopted in developing local tourism strategies. It is important to structure this collaboration in a way which means that no one organisation has unilateral overarching responsibility over a destination.

- n. Communities should develop structures for feeding into broader strategic decision-making, whether through new or established community governance structures. This body will represent an accountable forum for public engagement and provide strong leadership in order to encourage local involvement and legitimacy.
- o. This structure will also provide a single point of reference for other actors and stakeholders to engage with. Training and/or facilitation should be provided by development agencies or DMOs to support such structures in playing an active role in sustainable tourism development.
- p. DMOs, local councils and development agencies must see local communities as a necessary and active partner, engaging with them alongside businesses in developing tourism strategies. This should lead to proactive planning in preparation for tourism development, as opposed to reactive responses following identified problems.
- q. In practical terms, collaborative engagement should also extend to joint initiatives, including supporting communities to take ownership and responsibility for land, buildings, rewarded with funding and investment in facilities and infrastructure for mutual benefit.

Case Utsjoki

Utsjoki is the northernmost municipality of Finland, with half of the population Indigenous Sámi and the other half Finns. The municipality has created its own culturally sensitive collaboration model to engage local stakeholders in tourism planning. The model has been successfully utilised for land use planning and revising the local destination brand by engaging, among others, local tourism entrepreneurs and reindeer herders in the planning processes in dialogue with each other. Currently, the municipality is creating guidelines for tourism companies to instruct them of sites where tourists can be taken without causing harm to local nature or cultures. Reindeer herders and other local stakeholders, such as the residents of the three villages of the municipality, have been involved in the process. The municipality has actively applied for regional development funds for its local tourism development projects. It is running its own local sustainable tourism project and participates also in an international project where university researchers and local stakeholders are currently creating together videos to inform tourists of proper behaviour in the local nature.

IMPACTS OF COVID ON THE DEVELOPMENT OF ETHICAL TOURISM

SUMMARY OF FINDINGS

- One of the key trends has been a shift from international to domestic customers which has had both positive and negative impacts and has led some to shift towards cultural tourism.
- There has been a marked increase in outdoor tourism with natural areas receiving large increases in numbers of visitors. While this has had positive impacts on consumer perceptions of nature, it has led to pressure on infrastructure and natural heritage, and overcrowding in some areas.
- Economic pressure on businesses has led to unemployment, subsequent recruitment problems and business closures. Ongoing uncertainty associated with changing restrictions and the need to adapt practices accordingly has added to this financial burden.
- Many businesses have used the pandemic as an opportunity to reflect on their aims and product provision and invest in product development and innovation. There has been a huge increase in digital activity. Online networking has had significant benefits for businesses in terms of increasing reach and access to information.
- Young people in the tourism industry have been among the hardest hit by job losses and uncertainty coupled with impacts on their wellbeing due to reduced social and development opportunities. Other groups including women have been influenced disproportionately by restrictions.
- The tourism industry has experienced only a partial recovery amidst continued uncertainty and permanent business closures. Fluctuating regulations and travel restrictions, and therefore visitor numbers make it difficult for businesses to plan for recovery.
- There is a critical need to provide ongoing support to SMEs throughout the recovery process. Financial support should be accessible, tailored to specific circumstances and targeted to areas where it is most needed. Training in technology, digital marketing and development of new projects would provide additional support
- Networking at the regional level and the development of alternative tourism products are important measures to support recovery.
- Increased demand for holiday accommodation by the domestic tourist sector has caused tensions in rural communities over availability of affordable housing.
- An increased focus on domestic tourism was identified as a potential pathway towards responsible and ethical tourism, with a focus on nature and cultural tourism
- Community driven tourism is crucial in driving an ethical and sustainable tourism recovery.
- Stakeholders placed a focus on the importance of partnership: developing and maintaining connections and collaborations for mutual benefit and sustainability.
- Barriers to more ethical and sustainable tourism include a lack of clarity over the definitions of these terms and the need to manage trade-offs between different aspects of sustainability.

INTRODUCTION

Covid-19 has had a range of impacts on communities and businesses in peripheral areas in Northern and Arctic regions. This report aims to understand how tourism activity and initiatives have been influenced, the coping responses triggered by the pandemic and the opportunities that may contribute to development of a more ethical and responsible future for tourism. It is important to note that at the time of writing (December 2021), the pandemic very much remains an extant challenge with restrictions tightening and further consequences for the global tourist industry becoming evident. An understanding of the impacts of the pandemic on tourism is thus still emerging and this report will contribute to a growing body of literature on how the future of tourism may be shaped by a crisis that continues to unfold.

As well as bringing many well documented health, social and economic challenges, the pandemic has been viewed as an opportunity to rethink sustainable tourism models, addressing some of the challenges that increasing levels of tourism have been having on environments and communities worldwide (Higgins-Desbiolles 2020). There has been much discussion since the early days of the pandemic of how a post-pandemic tourist industry will be positioned to address issues such as over-tourism and climate change (Vazaru et al. 2021). There is a perception that habits and consumer preferences have changed and indications of a greater interest in pro-environmental travel, carbon footprint reduction measures and a willingness to travel to more local and less crowded destinations (Ianioglo & Rissanen 2020; Tuulentie 2021). There are other drivers influencing this trend, for example the public interest in climate change, heightened in relation to COP 26, as well as political drivers such as Brexit (Coles 2021).

Innovations in the way tourism is practised and managed are already evident. For example, the digitalisation of tourism has accelerated (Vazaru et al. 2021). Many providers have developed online marketplaces and have enhanced their products with digital media and modes of engagement. There is also evidence that visitors are seeking longer stays in places with smaller groups and are more likely to use companies that provide benefits to local communities and environment (Ianioglo & Rissanen 2020). This evidence suggests that tourism businesses which have already embraced a sustainability ethic have found opportunities to build on these strengths due to the mainstreaming of certain sustainability principles among consumers.

The negative impacts of the pandemic on tourism nonetheless remain greatly evident (Tuulentie 2021). In many Arctic communities COVID-19 has suspended or significantly decreased the numbers of international tourists. While the increase in domestic tourists has been welcomed by the tourism industry, many tourism companies have suffered difficulties due to the lack of clients, with their struggles clearly visible through social media (Rapo 2021). Nature-based and rural destinations have continued to attract visitors due to the perceptions of uncrowded and safe places to visit during the pandemic. This has contributed to problems of overcrowding in many regions of Europe (James et al.

2021). For example, there has been unprecedented pressure on many of Scotland's better known beauty spots in the Highlands and Islands. Focussing on five Arctic cities: Oulu and Rovaniemi (FIN), Luleå and Umeå (SWE) and Tromsø (NOR) a report on COVID-19 impacts (Simonen et al. 2021) found that domestic tourism has become so attractive that summer 2021 was a record-breaking year, despite the substantial decline in international visitors. Research in Scotland identified similar trends in relation to increases in domestic tourism. An increased demand for nature-based tourism activities and 'slow travel' are reflective of consumer demand for 'safe' experiences that will have health and well-being benefits (O'Connor 2021). Research from the Finnish-Swedish border reports on hopes that people have for COVID-19 indirectly increasing the interest in nature- and climate-friendly tourism as well as boosting virtual tourism (Rapo 2021).

In the Finnish context, the COVID-19 pandemic has highlighted the importance of domestic tourism as a substitute for international tourists (Honkanen et al. 2021). A report about the state of domestic tourism in Finland states that at the end of 2020, 83 % of overnight stays were domestic (Honkanen et al. 2021, Statistics Finland 2020), a 14% increase on the previous year (Ministry of Economic Affairs and Employment of Finland 2019). Many tourism services and products have been designed and priced for international tourists, and are therefore not fully attractive for the Finnish market (Honkanen et al. 2021). Within the Nordic context, the border communities, that are accustomed to daily travelling across the national borders (e.g. Finnish-Swedish or Swedish-Norwegian), have been disrupted by restrictions on cross-border travel and the need to comply with COVID-19 regulations of both countries (Nordregio 2021, Rapo 2021).

Economic recovery is clearly a key priority for a majority of stakeholders. It is important that a proactive approach is taken to ensure that principles of an ethical and responsible recovery are given sufficient weight and priority in tourism recovery strategies (Vazaru et al. 2021). The Covid crisis has brought into sharp focus questions that have been asked in relation to the pursuit of more sustainable tourism for many years, including those regarding who benefits from tourism, who sets agendas for tourism development - nationally, regionally, and locally - and how these agendas are perceived (Higgins-Desbiolles 2020). This is therefore an important time to consider how the Covid pandemic may influence the emergence of more ethical and responsible tourism. Crises such as Covid can have disproportionate impacts on communities and environments in fragile peripheral areas in the Arctic (Petrov et al. 2020). We can explore the future resilience of peripheral areas by understanding how communities can participate in endogenous forms of local development, lessening dependence on globalised industry and distant supply chains.

To define pathways for recovery, it is important to consider how the impacts of the pandemic have been experienced differently by different stakeholders and groups in peripheral communities. For example, the challenges faced by marginalised or minority groups have been exacerbated by Covid in some cases. Further, research carried out in Scotland found that challenges faced by women entrepreneurs during Covid were amplified during the pandemic due to difficulties in accessing finance and the disproportionate effects of the demands of home working and childcare (Arshed, 2021). However, the same research also highlighted opportunities for women that emerged for learning new skills, engaging with digitalisation and forging closer links with their communities. In-depth community-based research conducted across a range of case study areas in the Highlands and Islands of Scotland revealed that young people had been particularly badly affected by the pandemic (Bryce et al. 2021). This included those dependent on jobs in the tourism industry that found

themselves unemployed but also those who were unable to progress with training and career development. The study identified the need for support for younger age groups to support both personal and professional recovery from the impacts of the pandemic. In Arctic communities, indigenous communities are susceptible to the multiple impacts brought about by a pandemic due to their vulnerable socioeconomic status and political marginalisation (Petrov et al. 2021). However evidence suggests that indigenous knowledge and traditional practices combined with effective public health interventions contributed to the resilience of indigenous communities throughout the pandemic.

This report is out an output of the Northern Periphery and Arctic Programme's (NPA) ETRAC Cluster Project: Ethical Tourism Recovery in Arctic Communities. This work drew upon on four completed NPA projects: SHAPE – Sustainable Heritage Areas: Partnerships for Ecotourism; SAINT – Slow Adventure in Northern Territories; Arctisen – Culturally Sensitive Tourism in the Arctic; and W-Power – Empowering Women Entrepreneurs in sparsely populated Northern Communities. Our research for this report was initiated with a diverse range partners and associate partners of these projects and widened to include businesses and other stakeholders involved with tourism in the wider North and Arctic region. The clustered projects share a common aim of contributing to sustainable development embedded in communities in northern peripheral areas. The need to develop new and more sustainable tourism practices was evident prior to the Covid-19 pandemic and indeed these projects were all active before the crisis began. This cluster project provides an opportunity to understand how the pandemic has caused changes in direction, reflection, innovation and coordinated action to support peripheral communities in a changing world.

METHODS

Data was gathered on the following four key themes considered to be of importance to understanding the influence of the Covid-19 pandemic on tourism.

1. General impacts of Covid-19 on tourism
2. Opportunities for innovation and change in tourism practices
3. Impact on working practices
4. Strategies for recovery

An online survey was designed and launched using the Online Surveys software (JISC 2021) in both English and Finnish. The survey (Appendix 1) was distributed among the project partners and associate partners of the four NPA projects clustered in ETRAC, and also more widely among the networks of project participants and disseminated using social media. The survey was live from 18th October until 5th December 2021. Data was also gathered during two webinars that brought together stakeholders from the networks (described above) to discuss ethical tourism recovery following Covid. Webinars took place in October and November 2021. During the first of these webinars, participants were divided into small breakout groups of 4 or 5 individuals where contributions on the four key themes were gathered using the Mentimeter interface (Mentimeter 2021). This allowed individual perspectives to be explored in some depth followed by plenary reflection on the resulting themes. During the second webinar, preliminary survey and webinar results were presented to participants, followed by facilitated discussion on emerging findings and the identification of gaps. The two

webinars attracted different groups of participants so using these as discussion forums helped include a range of views and experiences.

RESULTS AND DISCUSSION

SAMPLE

SURVEY

A total of 38 valid survey responses was received. Of these, the majority (21) were from Finland, with responses also received from the UK (10), Canada (2) and one each in Belgium, Greenland, Iceland, Ireland and Russia.

Respondents covered a range of different organisations, with some indicating multiple identities in this regard. The most common types of respondent were SMEs or start-up businesses (10) and higher education or research institutions (9), followed by NGOs and interest groups (7), business support organisations (6), Destination Management Organisations (DMOs) (6) and other types of tourism enterprise (5). Also represented were training centres or schools (2), Research (2) or other projects (1) and a public authority (1).

WEBINAR

Contributions were received from around 40 tourism providers attending an ETRAC webinar in October 2021. Respondents contributed around 94 comments across three Menti boards focusing on 'Impacts', 'Opportunities' and 'Recovery' related to the tourism industry over the course of the pandemic.

Data gathered through both methods are integrated in the subsequent sections.

EFFECTS OF THE CORONAVIRUS PANDEMIC ON TOURISM ACTIVITIES

Respondents reported a mixed picture of the effects of the pandemic on tourism activities. While ten respondents reported a solely negative impact, over half reported both a positive and negative effect on tourism activities. Figure 1 summarises the reported trends in the tourism industry in the respondent's region since the start of the pandemic.

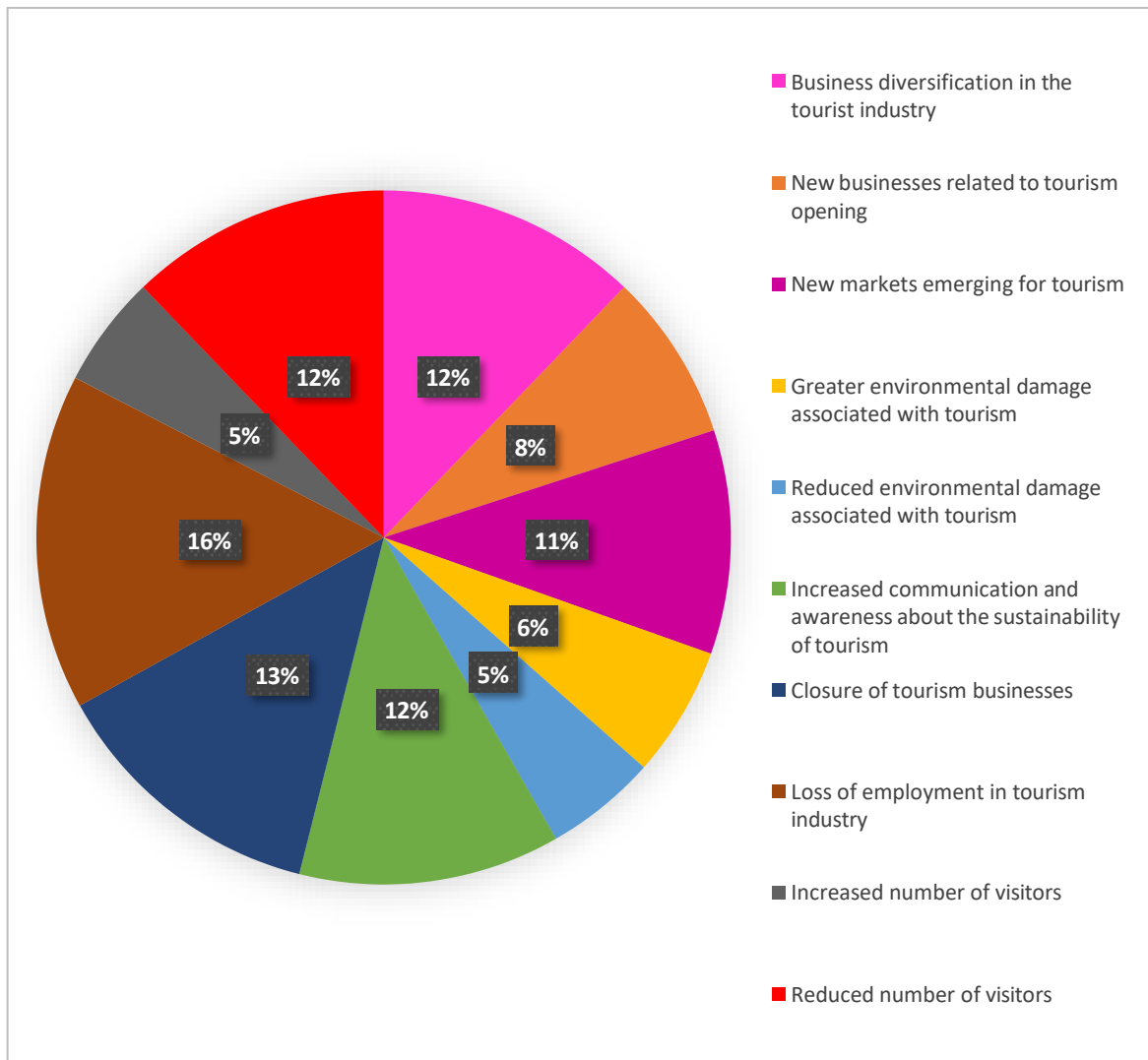


FIGURE 1- HAVE YOU OBSERVED OR EXPERIENCED ANY OF THE FOLLOWING TRENDS IN YOUR REGION SINCE THE BEGINNING OF THE PANDEMIC?

The most common reported effect was the change in the origin of tourism customers due to international travel restrictions. This led to a marked decrease in the international market, but a significant increase in the number of domestic tourists, with a mixed picture as to whether net custom had increased or decreased. While it was reported that some small rural tourism enterprises have experienced their best tourist seasons during the pandemic, other regions did not experience this same boom in domestic customers, leading to an overall loss in custom. Conversely, domestic visitors were claimed to spend more than international tourists, delivering greater benefit to local businesses.

“Interest towards Finland has increased, though the resources of tour operators and air travel connections to Finland have decreased. This is the paradox and challenge for us” (Respondent 22)

“My tourism activities have been influenced by Covid-19 both positively and negatively. The negative effect is that we haven't been able to travel that much as planned in the projects that I have been working in. The positive impact is that I have been travelling more domestically, and searched for more places and services in Finland and by that supported local

entrepreneurs. I have found myself being able to enjoy traveling in Finland without the need traveling abroad.” (Respondent 1)

Webinar results- Domestic/international tourists

A combination of the costs and restrictions on international travel have led to both an increase in domestic customers and a decrease in foreign tourists. This may lead to the offering of a slightly different tourism product or experience, and has led to an increased appreciation of local culture and traditional products. Furthermore, the large groups of foreign tourists have been replaced with smaller groups, families or couples, altering the demand for, and appropriateness of, certain tourism products.

In terms of the types of visitors, group and event-based tourism was replaced by more individuals or couples. Another effect was the increase in ‘new’ types of tourist to nature, which was considered to have resulted in increased overcrowding, rubbish and other poor behaviours.

Webinar results- Shift to outdoor tourism

The interest in outdoor tourism has seen a marked increase. Outdoor recreation and a desire for nature has led to increased interest in visiting national parks. While this is seen as a positive shift towards a more nature-conscious tourism, it has also led to higher demand on visitor facilities and infrastructure and a lack of awareness of appropriate behaviours.

Many businesses did experience a decrease in numbers over the course of various phases of restrictions or ‘lockdowns’. This led to the closure of some businesses for a period, and ultimately led to the closure of others. Businesses struggled to plan for the future, with a lack of clarity around the easing of restrictions, staff recruitment and retention, and the need to increase cleaning and rebooking of activities. However, for those that survived this period, some reported a marked increase in custom following the easing of such restrictions with visitors grateful for the opportunity to visit. The difference was considered to be partly due to the type of tourism business, with some able to flourish and others suffering disproportionately due to restrictions.

Webinar results- Financial and staffing impacts

The pandemic has had a financial impact on tourism entrepreneurs and businesses. Sales reduced with fewer people travelling over the pandemic, leading to unemployment, redundancies and business closures. In addition, there were increased demands on businesses in having to respond and adapt to changing regulations. Following the reopening of businesses, there have been challenges recruiting employees and many have found other jobs and careers.

CHANGE OF AIMS AND ACTIVITIES DUE TO COVID

Almost all respondents indicated that the pandemic had affected either the aims or activities of their businesses. These changes mirrored, in many ways, the effects of the pandemic on the tourism

industry, with businesses working hard to adapt to the new restrictions and prepare for different future scenarios.

The restrictions on social gatherings and international travel led to some businesses and projects not achieving their original aims within their intended timeframe, or resulting in weaker impacts. The pressures of cash flow and reduced income required innovative approaches to avoid bankruptcy. To compound these challenges, overheads were increasing due to the enhanced need for cleaning and hygiene to reduce the risk of infection, as well as needing to find more spacious venues to abide by social distancing guidelines.

Webinar results- Heightened expectations

The expectations of tourists are also increasing regarding cleanliness of accommodation and the provision of add-ons such as breakfast.

In response, many businesses adopted a new approach to their operations, looking to restructure their activities to focus on product development, marketing and advertising, client relations and communication, and governmental lobbying. Furthermore, there was perceived to be an opportunity to reconsider the broader philosophy around tourism, focusing on both financial and other goals. This led businesses to more explicitly consider and adjust their activities with regard to its impacts on climate change, local people and sustainability more broadly.

“As an island group we want to create more sustainable tourism that benefits our island and enables visitors to engage and contribute more than just cash” (Respondent 2)

“We understand much better our vulnerability, our value, and how important it is to count as a person” (Respondent 8)

Webinar results- Changed philosophy and business development opportunities

The opportunity to take a step back and reconsider the value of tourism was considered very valuable. New perspectives and innovations were developed for an alternative approach to tourism. This was reported to have led to a number of business development opportunities. The lockdown offered the possibility for businesses to develop new activities and instigate partnerships and cooperation among peers. The provision of recovery funding is welcomed, while the development of online marketing platforms will also help to promote tourism products.

The main result of this combination of restrictions and changed philosophy is the huge increase in online activities, for both the international and domestic markets. Online tourism activities allow small providers in more distant locations to harness international interest in products, innovating to be able to offer a version of the tourism experience digitally. This is reflected in Figure 3, illustrating the number of businesses increasing their online/digital activities. New online tools and programmes have opened up possibilities for businesses, with new digital equipment being acquired to enable this new business practice. In reducing the need for travel, this is considered ‘greener’ than the in-person

alternative, while also reducing the effects of seasonality to build a more stable income across the year.

“Korona prevented many meetings and trips and moved the teaching to remote connection for a while, but brought a lot of learning of different kinds of digital tools and helped virtual travel to jump forward.” (Respondent 36)

“During these two years we have become closer with our partners, foreign tour leaders, colleagues in tourism. And we had more free time to show and tell our friends and colleagues in the Facebook about our life here, about our hobbies in Karelia, about Russia, about famous and most popular sights in Russia. We evoked the wish of our tourism colleagues to bring tourists to Karelia, to Russia and to Russian northwest.” (Respondent 15)

Webinar results- Increased interest in digital tools and presence

There was an increase in the use and importance of digital tools in the marketing and provision of tourism experiences.

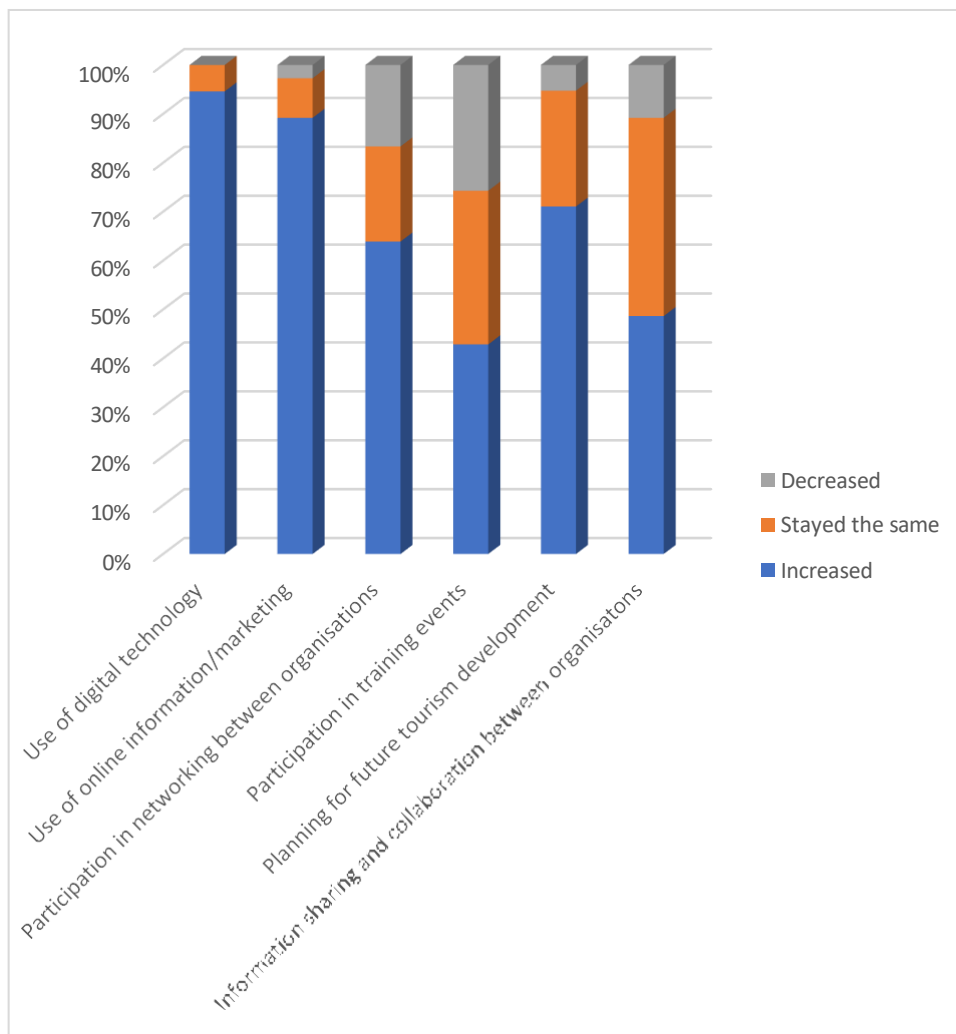


FIGURE 2- CHANGES IN WORKING PRACTICES AS A RESULT OF COVID-19

Access to events online opens up possibilities to attend short meetings anywhere in the world without the need for costly and time-consuming travel, in turn increasing available time for other activities. The downsides were seen to include the lack of natural breaks usually caused by in-person meetings, with almost all communication happening online. While many celebrated the ability to conduct everything online, there were others that would still rather to be physically together.

The ability to network and collaborate received similarly mixed reports. The time and ability to meet with people was reported to have increased, resulting in much higher participation and opportunities for joint ventures, peer support and information sharing with similarly-minded businesses, both locally and across the world. This has allowed businesses to match their own values and principles to others, while enhancing the ability for collaborative tourism plans to flourish between different types of actors. However, the quality of this interaction was questioned. The impacts and longevity of information sharing were criticised as being superficial, and face-to-face networking opportunities have decreased over the pandemic, reducing the chance for more authentic interaction.

“Collaboration and networking has moved to digital mode. Quantity might have increased temporarily, but impactfulness decreased. It is relatively easy to work remotely with people

you know before, but with entirely new people the networking, brainstorming and learning new things is weaker with results.” (Respondent 38)

Webinar results- Networks and collaboration

Networks of business and institutions were suggested to help promotion and communication of ethical and sustainable tourism.

Where it was possible to maintain local collaboration over the pandemic, increased networking was reported to have resulted in very positive impacts. Localities have adopted a cohesive and joined-up approach, bringing actors together locally to support the future of tourism in the area. Organisations have provided mutual information sharing and support in the spirit of solidarity and serving the common good, to get through this difficult period together. Examples of this included the increased use of multi-product tour packaging incorporating local subcontractors, imposing minimum stay limits for local accommodation providers in an attempt to attract customers to other local providers, and collective distribution of personal protective equipment (PPE) and other supplies to support the local tourism industry. While most respondents reported improved relationships, there were also examples of less collaboration as competition for decreased visitor numbers became fiercer and more competitive.

“During the NPA programme SHAPE, we created a destination management plan which was launched in early 2020 - the first of its kind in Scotland. Little did we know that having a plan already in place would be key to COVID recovery funding streams, so we were able to access funding support to develop new initiatives that would not have been possible without the plan and its timely completion just before COVID.” (Respondent 9)

Finally, training and other seminars can be arranged and delivered globally, attracting new colleagues and customers and cementing a reputation within previously unknown networks. While some considered this provision to have remained steady over the course of the pandemic (due to its online presence), others have witnessed an increase in number but a decrease in quality, no longer accounting for the needs of the ‘client’ or participant.

Webinar results- Research and knowledge sharing

Knowledge of best practice and successful approaches to recovery of the industry were favoured. This included increased education for businesses and the public on the nature and benefits of sustainable business, risk management strategies and the impact on indigenous groups.

EFFECTS ON PARTICULAR GROUPS

Respondents were asked which particular groups have suffered the most due to the pandemic. While all groups were considered to have been negatively affected, Figure 2 highlights the effects on small or micro businesses, women and young people were considered particularly negative.

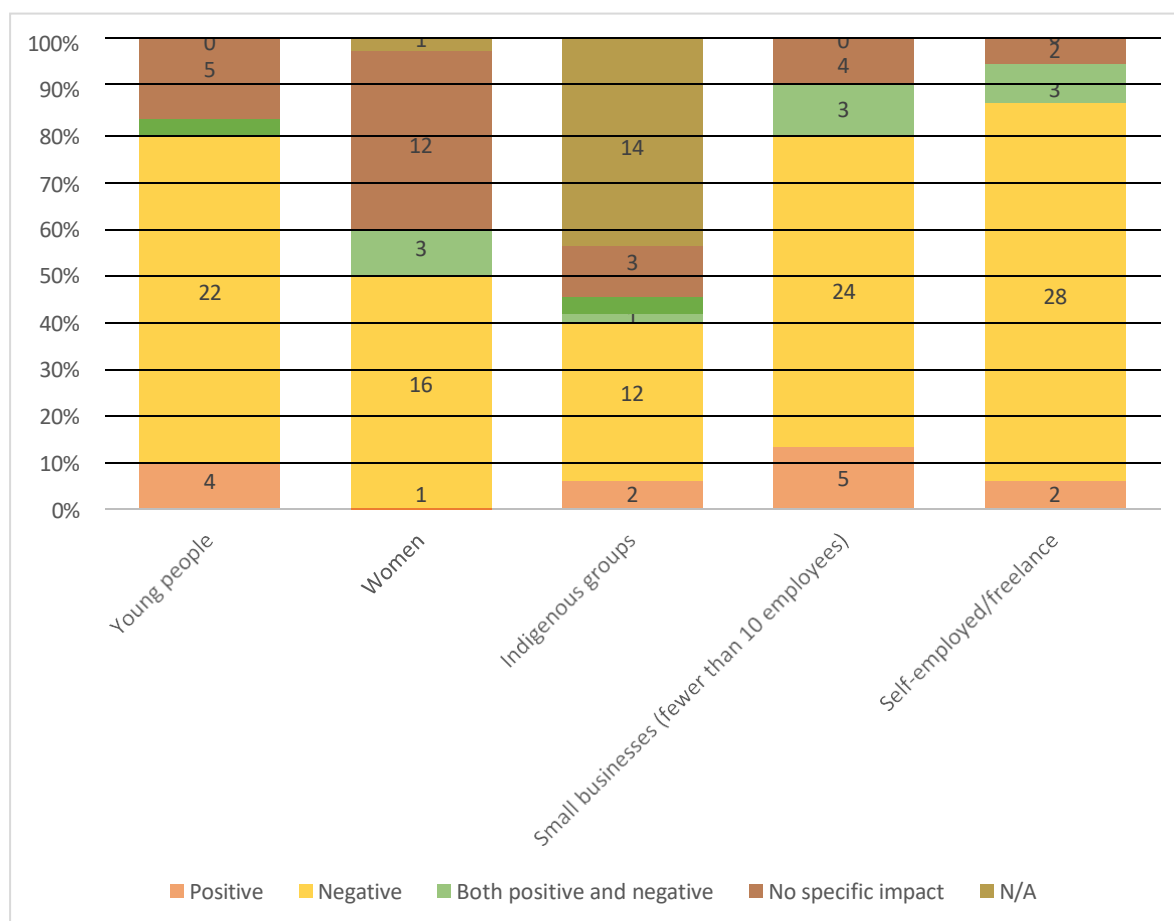


FIGURE 3- SPECIFIC IMPACTS OF COVID-19 ON SPECIFIC GROUPS

Small and micro businesses were seen to be disproportionately affected due to the small margins they are working to in order to survive, and their ability to cope with shocks and acute downturns in tourism-related income. The creative sector was specifically highlighted as having been hit hard by the restrictions. However, following the reopening of tourist activities, small businesses were seen to have bounced back quickly, with an increase in custom related to the small scale and less possibility of encountering large numbers of people.

“When tourism has started again, small businesses have been the winners, because many have not wanted to go first to large companies (restaurant, hotel etc.), where there is a danger of encountering plenty of people.” (Respondent 22)

Young people were highlighted as having been negatively impacted, with many working in lower-level and part-time hospitality jobs. Many have left the tourism sector due to immediate job losses and uncertainty and anxiety over the sustainability of their employment, subsequently affecting the ability to recruit and retain skilled staff. Furthermore, the impacts on young people are seen to have also been in their social life and wellbeing, with social activities and ability to travel having been curtailed over the course of the restrictions.

“I feel that mostly young employees have left the sector, who are in the phase of their career that they wish to advance. When tourism and restaurant sector has seemed challenging in the last 1,5 years, the young have felt it as anxious and moved to other sector.” (Respondent 28)

Finally, women were considered to have been particularly disproportionately affected due to making up a majority of workers in the service industry, and therefore bearing the brunt of the restrictions. In addition, the shortage of childcare provision and added stress of working from home is considered to have affected women more than men over the course of the pandemic.

“Many of the small tourism businesses are women’s businesses. Decrease of tourists, shortening of season led to less income. Some of the businesses have quitted.” (Respondent 30)

Additional groups/sectors who were considered to have suffered disproportionately as a result of restrictions include:

- Businesses that rely exclusively on foreign travel;
- Hospitality, events and creative sectors that rely on in-person social activities;
- Elderly and vulnerable people who may be unable to socialise or attend activities;
- Rural communities who may experience additional challenges to recruit and retain workforce;
- New start-up businesses who may struggle to access external business support.

RECOVERY

Respondents indicated that the tourism industry had only experienced a partial recovery. While some businesses are on the road to recovery, others continue to face significant ongoing challenges and some businesses have permanently closed (Figure 4).

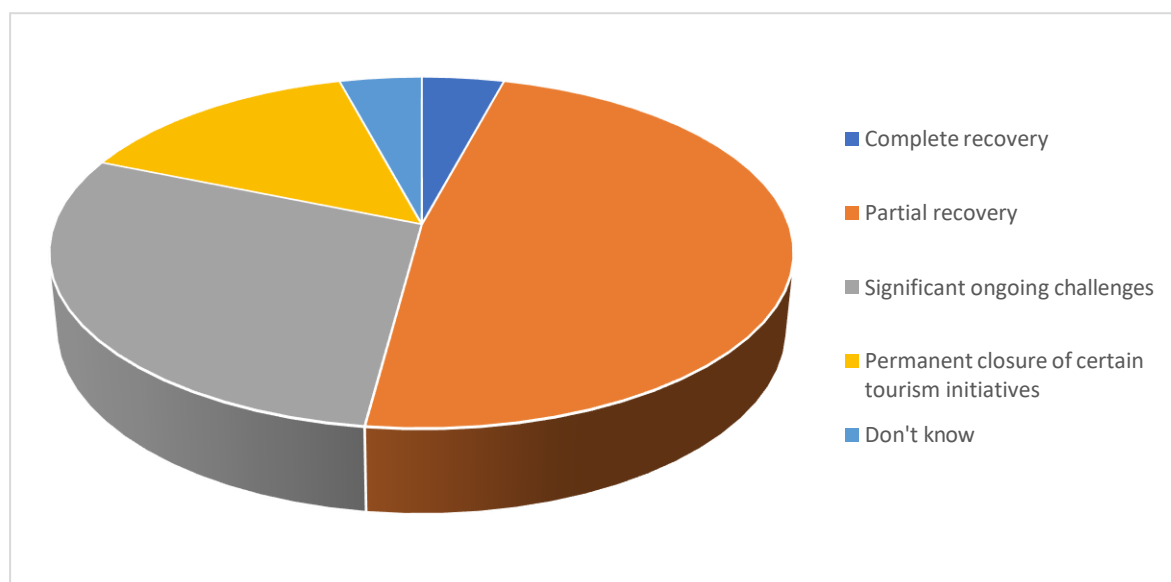


FIGURE 4- TO WHAT EXTENT YOU FEEL THAT LOCAL TOURISM INITIATIVES HAVE RECOVERED FROM THE PANDEMIC?

Those that are recovering cite the increase in both domestic and international travel following the removal or relaxation on restrictions on movement as being crucial to their ongoing success. There are early signs of event popularity and more belief in the tourism sector, but there is an awareness that the situation is still precarious and unpredictable. The main reason for that uncertainty is the continuing presence of the virus, with fluctuating outbreaks around the world leading to regular

changes to travel advice and possibilities. Despite the focus on online/digital offerings noted above, many businesses continue to be dependent on tourist mobility to survive.

"In Greenland we are far from having tourism back to "normal", since border closures have been so strict, and domestic tourism cannot come close to sustaining the industry. So there are still significant challenges and some operators that will never recover." (Respondent 13)

Such uncertainty in the ability to travel directly leads to broader financial uncertainties for businesses, limiting confidence and consequently investment into creating or developing tourism initiatives. This is in addition to a number of other challenges, with those in the UK facing rising prices of goods as a result of Brexit, and providers in all regions having to deal with increased insurance costs due to the virus, and ongoing struggles with recruitment and retention. This last point was a challenge to businesses across all regions, with the inability to recruit the quality and quantity of staff limiting hours for some businesses. This is especially frustrating where customers have started to return, but businesses are unable to capitalise due to a lack of workforce.

There is a recognition that the need to change business practices to a new way of operating will aid recovery, with an understanding that 'business as usual' may not be possible or desirable. This is not simply a financial consideration, with some operators considering ethical dimensions and others valuing a work-life balance more than before the pandemic. Finally, this new approach to tourists and tourism can also lead to conflicts between 'traditional' types of tourists and those who have discovered the outdoors as a leisure pursuit following the pandemic.

"I see an increasing tension between "old school hikers" and people who go to nature since the pandemic. And a tension between people who travel light and those who bring every luxury with them." (Respondent 8)

SUPPORT FOR RECOVERY

It was considered crucial that there is available ongoing support to aid businesses through the recovery process, especially to bridge the 'low season' to ensure that businesses survive. This was particularly important for small businesses that may not have the financial reserves or stability that larger operators enjoy.

"Many people have gone out of business. This winter will be very telling. It is a case of hanging on for dear life. Big business is fine as they have time, staff and knowledge to apply for grants and initiatives and still capitalism panders to the megalithic... however, small businesses have slipped through the cracks of accessing HELP to survive, and this winter will be a make or break for many - myself included!! Another few months of very little income and no government assistance!" (Respondent 3)

Most countries had some form of state financial assistance which, aside from some difficulties in being able to access it, was considered the single biggest source of support to help tourism initiatives survive and develop. Other sources of financial support included grants from non-state sources, and the easing of debts or loan payments from the private sector. In addition to direct financial assistance, respondents noted the importance of a sectoral approach to tourism recovery. This incorporated investments in promoting domestic tourism and targeted support to the most affected areas to encourage visitors to return.

“South Ayrshire’s Pilot Motorhome Parking project helped encourage touring visitors to spend time and money in the town. Scottish Government SENScot’s Pilot project Girvan Community-Led Tourism has initiated an innovative approach to promoting Girvan Tourism.” (Respondent 6)

While state financial assistance was offered, the most common theme of how the recovery has been hindered was in the detail of how this was delivered. Respondents instead suggested that the state should have offered support on a case-by-case basis rather than an algorithm, and that certain practitioners were given too little, while others were given too much. Some suggested that aid should have covered salaries to help retain staff, while others favoured rent relief and development funding to help support entrepreneurs to adapt to the situation, create meaningful local connections and drive the recovery. Many agreed that this support should have been offered quicker, with a simpler system, and communicated more clearly.

It was also considered necessary to offer training opportunities in areas such as technology and digital marketing. Through delivery via online courses, this was considered crucial in supporting the development and education of future tourism workers and products. Relatedly, a seminar bringing entrepreneurs together to discuss the difficult business conditions and the way forward was appreciated both for the training it provided and the networking opportunity. These themes of training, networking and product development are reflected in Figure 5, illustrating what respondents felt would benefit tourism in their area.

“I think the development of alternative products will require training and collaboration. There is already talk of micro SMEs that want to club together to create experiences and products, spreading the benefit over a wider area.” (Respondent 9)

Other similar collaborative possibilities were supported, through transnational and regional networking, to develop a shared understanding of challenges and solutions and support individuals psychologically and emotionally. This psychological element was emphasised on the individual level too, encouraging enthusiasm and belief in the future of the industry in order to drive the recovery.

Webinar results- Support and Guidance

There was a call for more support and guidance for the tourism industry to be able to build back stronger. This required more leadership from the industry in providing guidance and support for finding and funding ethical and sustainable solutions, including training for entrepreneurs and creating platforms to help promote and sell products. National guidelines incentivising change were also suggested to promote sustainable approaches.

Finally, a theme of what else could have been done to support the recovery was in a more sectoral or regional approach to tourism recovery. Regional approaches and promotion were seen as important for networking and collective effort towards a common goal. Local government was called on to provide finance and auxiliary services (e.g. facilities, accommodation and public transport links) to support the local tourism industry, as well as provide more structural support to allow for the provision of affordable staff accommodation and create a specific department for the promotion of certain

types of tourism. This was seen to lead to more interest in domestic tourism through a linked-up strategy.

“Improved public transport links; the set up of a business association to encourage local businesses to discuss what services and tourism offers Girvan needs next, and how the business community can work together to raise their game. (e.g. Eco-friendly, accessible, dog-friendly, cafes with outdoor seating; extended business hours; local tour guides; touring caravan park space in walking distance of town)” (Respondent 6)

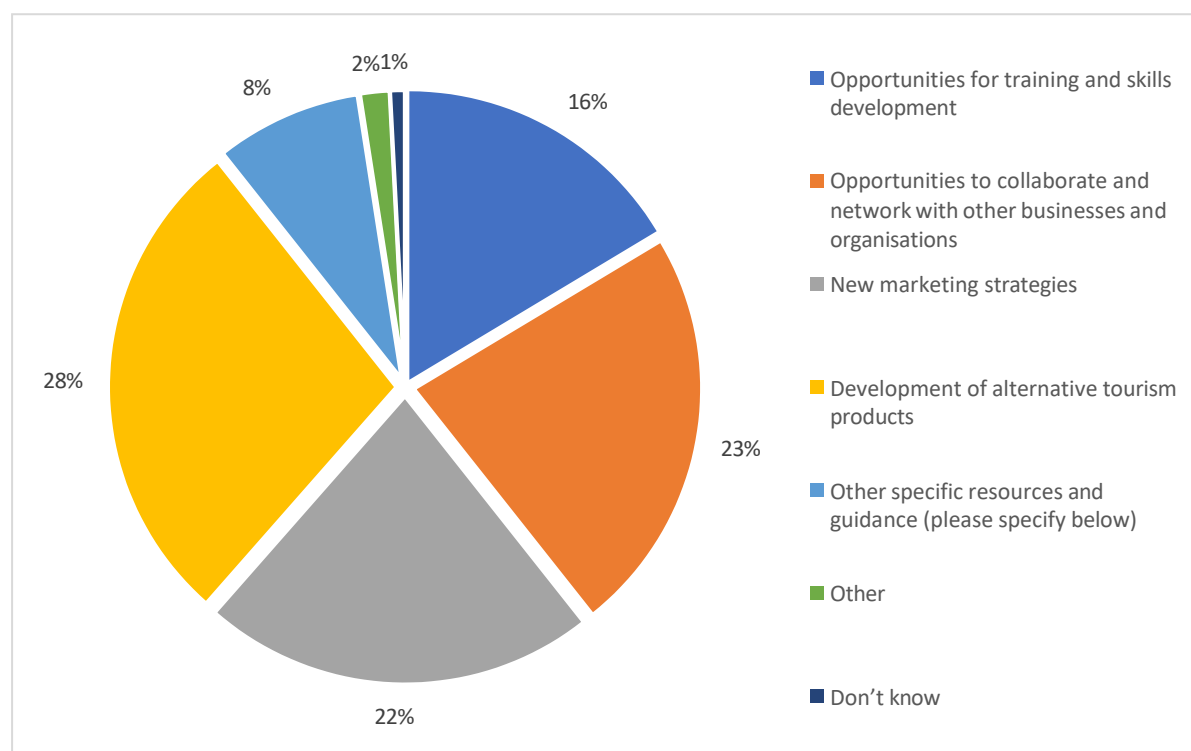


FIGURE 5- WHICH OF THE FOLLOWING WOULD BENEFIT TOURISM RECOVERY IN YOUR AREA?

RELATIONSHIPS WITH COMMUNITIES

The results displayed in Figure 6 paint a mixed picture of the relationship between tourism providers and local communities. In areas where the two enjoyed a relative peace, there was uncertainty as to whether an improvement of local perception of tourism during the pandemic was due in part to its reduction in prevalence.

The very nature of tourism became problematic during the pandemic, encouraging and attracting people to move from one area to another, potentially bringing the virus into areas it had not previously been present in. This had the potential to create conflict between providers and other local people as livelihood was pitched against public safety. Where community organisations provided the product/experience themselves, this was met with appreciation and responsibility among visitors to be as safe as possible. Other tourism businesses spoke of their belief that communities should feel

more appreciative for the success and development which tourism has brought to their region, stating that such effects were eventually acknowledged as positive following their imposition 'by force'.

Increased domestic tourism over the course of international travel restrictions led to increased (and unsustainable) pressure being placed on certain areas which lack adequate infrastructure to deal with the numbers. This was complemented by an increase in irresponsible tourism behaviour, damaging relationships with local people who are unhappy with those that continue to attract people to the area. In response, an increase in facilities, conservation staff and both pre-arrival and on-site education is starting to address these aspects in some areas, but it was noted that there is still work to be done. However, in response to such overcrowding, visitors seeking to avoid newly busy areas by discovering new quiet nature destinations may have the effect of spreading the benefits of tourism to new areas.

A central conflict between communities and tourism is in the accommodation sector. A confluence of factors, including the increased demand for 'private' holiday accommodation and the increased ability to work remotely, have affected the housing market, especially in rural areas. High property prices have negatively affected both the ability of local people to remain in their communities and the availability of affordable housing for employees, further compounding the difficulties in recruitment and retention. The self-catering nature of this accommodation further reduces the potential financial benefit of visitors who are less likely to frequent local hospitality businesses. Therefore, this shift has negatively affected local people, tourism businesses seeking staff and local hotels and B&Bs, while only benefitting the owners of these second/holiday homes.

This is in direct opposition to the belief that local communities should benefit from tourism activities, and instead has led to money being extracted from the area and small businesses having closed or been acquired by larger enterprises. There was a mixed response as to the effects of the pandemic on these local factors, with businesses reporting both positive and negative consequences.

"There is a strong belief that more benefits from tourism should go to the communities, instead of businesses that are outwith the destination communities (eg. motorhome/campervan hire companies, large hotel chains, large supermarket and fuel station chains)." (Respondent 16)

All of these factors combined were claimed to have heightened recognition of the extent to which communities rely on the tourism industry and whether its impacts were directly benefitting local people. While those not reliant on the industry may have considered the lack of visitors a positive thing, it also led to the closure of valued services which are kept afloat by tourists. Many providers valued the quieter period over the pandemic to connect with local people and reconsider how their business activities could better serve their collective needs better in the future.

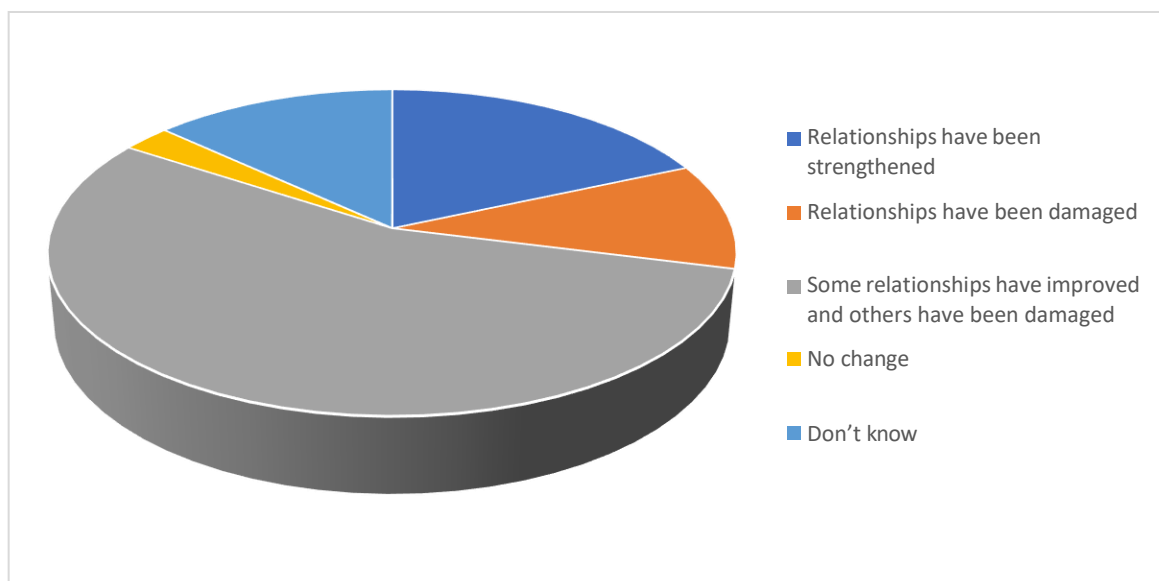


FIGURE 6- HOW HAS RELATIONSHIP BETWEEN TOURISM AND HOST COMMUNITIES BEEN INFLUENCED BY COVID?

ETHICAL AND SUSTAINABLE TOURISM RECOVERY

Building on this stated importance of positive collaborative relationships with local communities, respondents saw community influence and control over, and benefits from, tourism as crucial in driving an ethical and sustainable tourism recovery. Failure to do so will create a destination which loses some of its very appeal, thus giving community control both an ethical and financial dimension.

“Giving destination communities a better opportunity to influence tourism management and development is important. I think at the moment, lots of communities feel like this is out of their hands. At the same time, managing public services like public toilets should not be forced onto communities without proper funding and support easily available.” (Respondent 16)

Webinar results- Demand for different type of tourism

Such new approaches included shifts towards tourism opportunities which are:

- Virtual- the possibility of meeting people all over the world without contributing to carbon emissions;
- Local- sustainably discovering local tourism destinations;
- Natural- visiting open green spaces to appreciate outdoor and nature-based activities
- Environmentally-conscious- Reducing transport-based emissions
- Authentic- moving towards a slower, more meaningful form of tourism

In addition to the financial requirement to maintain certain cultural aspects of destination communities, the increasing interest and demand for ethical and sustainable tourism can be harnessed in order to build a thriving tourism sector.

“Sustainable and ethical areas in each country including Russia have always had a big potential! Cultural tourism and ethical tourism have always been in demand and need a strong

promotion and support of local authorities and the governments! It is worth developing and promoting ethical areas, people living in these areas, making fam trips, advertising campaigns, spreading souvenirs with the local symbols, etc. These areas rich in culture have a great potential in tourism!” (Respondent 15)

However, this market needs investments in education and promotion of tourism providers in order to harness this potential, as well as encouragement to think differently about the objectives of tourism. Such changed perspectives include a focus on the existential threat of climate change; the relationship between people and the environment and how we can learn from indigenous groups in that respect. Tourism can (and in many places, already does) play a leading role in this effort in the way the industry acts and develops in a responsible, collaborative and socially-conscious manner, especially in the Arctic region.

One of the ways in which this can be achieved is through further building upon the trend towards domestic tourism. As this commonly requires shorter travel distances, domestic tourism is usually responsible for lower carbon emissions, while offering a new income stream which may buck normal seasonality trends and thus develop further financial sustainability. A multisectoral, regional approach must be adopted in this effort, recognising the different roles played by each. A specific focus on marketing is required to encourage awareness of sustainable and ethical tourism locally, which may be more understood by an international audience. Further, the cooperation and collaboration of different stakeholders can develop confidence in the tourism industry, improve the attitudes of both providers and potential customers as to the future of tourism, and develop a focus on sustainable and ethical planning over maximising financial returns.

There were a number of barriers highlighted as making such an ethical and sustainable recovery more challenging. The first was the uncertainty of what these terms mean and how they are put into practice, and how they can be made attractive to pursue in an environment where businesses are experiencing considerable pressure to generate sales as part of their post-Covid financial recovery. Many businesses may already be acting in a sustainable and/or ethical manner, but lack the recognition or certification for doing so. Furthermore, these concepts are not always mutually-reinforcing and may require trade-offs. For example, while limiting the number of visitors to locations can tackle over-tourism as part of a sustainable approach, it was cautioned that simply limiting visitors to avoid over-tourism may not be the most socially-just approach, as only the wealthy will be able to travel, and limits will be placed on the number of businesses able to operate. Finally, related to the focus on community control, the benefits of the increasing interest in ethical and sustainable tourism are at risk of being secured disproportionately by large and unaccountable tourism operators, sometimes accused of engaging in ‘greenwashing’ to harness this demand.

Structural barriers also exist with regard to the lack of a local and regional vision for sustainable and ethical tourism. The creeping influence of holiday homes and motorhomes are being favoured at the expense of additional green infrastructure or nature-based tourism. A continuing lack of public transport provision exacerbates carbon emissions linked to private transport, while a lack of appropriate accommodation for local tourism staff necessitates long commutes and limits recruitment and retention. This issue has been highlighted previously as being key to ensuring sustainability of the sector, with non-seasonal, year-round employment considered a solution to attracting employees and facilitating sustainable growth.

THE FUTURE

Overall optimism for the future of the industry was mixed, with some reporting lower ambitions caused by the financial hits over the course of the pandemic. While some reported no change to their business following this experience, others were uncertain as to whether it will still be viable into the future. This uncertainty led to new perspectives on how tourism could (or indeed should) be done, and how financial security could be balanced with social and environmental sustainability.

The belief that tourism providers should expand with demand was questioned, with some providers preferring to stay small, foregoing financial maximisation in favour of high quality, ethical, sustainable provision offering a good work-life balance to providers. A focus on scale was replaced by that of partnership, developing and maintaining connections and collaborations for mutual benefit and sustainability.

Webinar results- Business adaptation

Businesses themselves were tasked with rethinking their models to adapt previous approaches and businesses models to create more sustainable tourism products and packages and create more added value in a sustainable manner. A specific requirement was for businesses to recruit and train staff, especially young people and those who have left the industry during the pandemic and to take longer-term decisions to aid predictability within the sector.

There was an identified demand for responsible nature and cultural tourism, building on a greater focus on climate change and the desire to provide authentic cultural experiences which benefit local communities. This needs to be marketed in the right way in order to harness this demand and not allow tourism to return to the unsustainable model of the past.

“The pandemic has influenced my views by supporting the thought to concentrate more developing domestic tourism based on the local assets and perspectives. Tourism should be developed from a local perspective, and tourism services could be developed to be more suitable for locals as well.” (Respondent 1)

The future of international tourism was questioned, both from the perspective of transport-related carbon emissions and the potential for further restrictions to international travel. It was recommended to combine both the domestic and international markets to spread risk, expand the scope of the ‘high season’ and develop new products. The development of products for the domestic market was considered to be constrained by poor self-identity and self-belief in some regions, something that needs to change in order to harness domestic customers and benefit local people. Finally, the encouragement of more accessible products to the domestic market may also lead to a replacement of larger foreign groups with individuals or couples.

Specifically, respondents saw a number of potential or desired developments influenced by the experience of the pandemic.

- There was a desire for more genuinely community-led form of tourism, controlled by, and for the benefit of, local people. As well as aiming at both economic and social objectives through this approach, it also seeks to become environmentally sustainable.

- There was a move towards ethical, 'slow' and sustainable tourism products and experiences, focusing on natural capital, health and wellbeing, and the domestic market, while continuing to keep people safe from the virus.
- Tailored training and skills development should benefit businesses activities, with suggestions to better connect tourism businesses and educational institutions. Specifically, training was sought in social media marketing. While seeking more knowledge in these areas, there was also a hope that tourism providers would be valued and respected for the knowledge they already have in the field.
- New funding and income sources were sought, with a specific mention of regional development organisations for whom the economic development of a region is a central objective.
- International collaborations of businesses and other organisations, rooted in shared values of sustainable tourism, could lead to better networking, funding opportunities and peer support in this area.

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