

NATURE-BASED TOURISM AS A TOOL FOR RURAL DEVELOPMENT IN NORWAY

NATURABASERT REISELIV SOM VERKEMIDDEL FOR BYGDEUTVIKLING I NOREG

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Preface

This thesis was written during the spring of 2013 and marks the end of my two-year master's degree in nature-based tourism at the Norwegian University of Life Sciences. My work has been performed as part of the research program "Nature-based tourism businesses – businesses, competence and recruitment" at the university, a research program financed by Innovation Norway and Skogtiltaksfondet. Taking part in this project has been very educational.

The decision of writing the thesis in English in the form of an article was taken early on with the purpose of making it easier if I choose to attempt getting it published in a journal. For the purpose of presenting it as my master thesis the structure has been somewhat modified from a typical article form.

I want to thank everyone that has been involved in the project; especially my supervisors Stian Stensland and Jan Vidar Haukeland, Knut Fossgard, which has given great technical support, Sjur Baardsen, which has given me valuable input on operationalizing and analyzing the economical parts of the thesis, Peter Fredman, which was involved in the development of the questionnaire, and my fellow students Ida Grubben, Johannes Apon and Halla Hafbergdottir, which have been to great support and motivation during our cooperation.

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Abstract

Tourism is often seen as an industry with the ability to facilitate development. In the Nordic countries, interest has been pointed towards its ability to maintain viability in rural areas in an era of decline in primary industries. Since nature is one of the most distinct attractions of Norway, as well as the main attraction of most rural areas, nature-based tourism is particularly interesting in this context. As a contribution to the lacking research on the supply-side of nature-based tourism, this article seeks to contribute to the understanding of the role of nature-based tourism as a tool for rural development. The main purpose was to map the direct local value creation through tracking of income and profit leakages. Additionally, an attempt of explaining the found difference was performed through analyses of certain aspects of the businesses. The average Norwegian nature-based tourism operator was found to give a local value creation of 39% of their turnover. The large variation ($SD = 44\%$) was found to be affected more by the overall economic performance of the businesses than by the amount of direct leakages, since direct leakages were overall quite low both when it came to investors and to employees. Maintaining year-round activity and improving product quality was found to be important ways of achieving more robust businesses. Results also indicate that well-organized systems for cooperation and marketing can improve the overall performance of the industry.

Keywords: Nature-based tourism, value creation, rural development

Samandrag

Turisme vert ofte sett på som ei næring som kan bidra til utvikling. I dei nordiske landa har ein særleg fokusert på at turismen kan skape nye arbeidsplassar i rurale strøk der tilbakegangen i primærnæringane har gitt vanskelege økonomiske forhold. Naturbasert reiseliv har ei særstilling i så måte. Både på grunn av at naturen er blant dei største attraksjonane Noreg har å by på, men også sidan det særleg er dei rurale strøka som har attraktiv natur. Målet med denne artikkelen er å bidra til forståing av tilbodssida av det naturbaserte reiselivet ved å undersøke korleis næringa bidreg til utvikling i rurale strøk. Først og fremst ligg fokuset på å kartlegge lokal verdiskaping gjennom å spore lekkasjar, men det er også gjort eit forsøk på å forklare den variasjonen som blei funne. I gjennomsnitt hadde bedriftene ei lokal verdiskaping på 39% av omsettinga, men variasjonen var stor ($SD = 44\%$). Lekkasjar såg ikkje ut til å ha spesielt stor betyding, verken når det gjaldt investorar eller tilsette, så variasjonen var i hovudsak eit resultat av varierende lønsemd. Resultata indikerer at auka kvalitet på produkta og auka grad av heilårsdrift er viktige moment for å forbetre verdiskapinga, samt at eit forbetra samarbeids- og marknadsføringssystem kan ha god effekt på næringa sett under eitt.

Nøkkelord: Naturbasert reiseliv, verdiskaping, bygdeutvikling

Introduction

Norway is characterized by unique nature, giving a special opportunity to develop nature-based tourism (Nærings- og handelsdepartementet 2012, p. 18). The fact that rural areas by definition have access to nature (Hall & Boyd 2005), combined with the popular notion that nature-based tourism is growing faster than tourism in general (Bell et al. 2009; Newsome et al. 2002; UNWTO 2009) also makes this an attractive field when it comes to rural development. Nonetheless, we know little about this part of the tourism industry in Norway. This is partly due to the scattered, small-scale nature of the industry, which makes it difficult to collect comprehensive data on its structure and economic role (Forbord 2012; Fredman & Tyrväinen 2010; Lundmark & Müller 2010; Rinne & Saastamoinen 2005), but the lack of an established definition is also a problem (Fredman & Tyrväinen 2010; Rinne & Saastamoinen 2005).

The traditionally very rural Norwegian population is undergoing urbanization. In recent decades all Norwegian metropolitan regions have had a growth of 20% or more, often with even higher growth rates in the surrounding areas (St.meld. nr 31 (2002-2003)). Businesses relocate to get better access to markets and specialized work forces, while individuals move to cities for education and better job opportunities. Although 60% of the people moving into cities when young move back out, they tend to move to the city surroundings (St.meld. nr 31 (2002-2003)). Additionally, people tend to wait longer to settle down (Ekne Ruud 2009), increasing the average amount of years spent in cities. The result is a rural leakage of human and social capital, which represents a challenge in the aspect of developing rural areas because it leads to unhealthy demographic distributions affecting the ability of rural communities to maintain both physical and social infrastructure.

So why does Norway want to maintain a populated countryside? Reasons include preservation of cultural and natural heritage which depend on traditional use, increasing population pressure in the cities, and maintenance of food production. International commitments play part here, for example regarding food production, where the Norwegian government is obliged through UN commitments to provide food security for its inhabitants (Meld. St. 9 (2011-2012)).

According to Hall and Boyd (2005, p. 4) “*a region is rich if it has human capital and social capital because these are the means by which other forms of capital are produced and specific aspects of the natural environment turned into tourism resources*”. The Norwegian government has signaled that they will focus especially on promotion of tourism as one of our important industries for the future (Nærings- og handelsdepartementet 2007; Nærings- og handelsdepartementet 2012; St.meld. nr. 15 (1999-2000) ; St.meld. nr. 25 (2008-2009)).

Recently, three main goals of this work are established: “*Increased value added and productivity in the tourism industry; More year round positions and more solid businesses, especially in rural Norway; More unique and high quality activities attracting more guests with high willingness-to-pay.*” (Nærings- og handelsdepartementet 2012, p. 4). This paper therefore seeks to understand a bit more about how successful nature-based tourism can be as a tool for developing rural Norway. It aims at mapping average local value creation, as well as to investigate some factors that potentially affect this variation.

Since the challenges connected to urbanization are seen in many developed countries these days, results presented in this paper could be of relevance for similar countries, such as the Nordic countries, Canada, Scotland, Australia and New Zealand, which are all comparable to Norway with regard to natural resources and, to a varying degree, with regard to the culture (Fredman et al. 2009; Fredman & Tyrväinen 2010; Lundberg & Fredman 2011).

Theory

Nature-based tourism

So what do we know about nature-based tourism? Apart from being small scale and rural, it is characterized by a large amount of lifestyle entrepreneurs (Lundberg & Fredman 2011).

Lifestyle entrepreneurs and small scale are typical traits for tourism in general (Getz et al. 2004; Peters et al. 2009), and lifestyle entrepreneurs are basically defined by being motivated by a certain lifestyle. Because of their motivation, they are often accused of not being as organized, innovative and effective in their use of available resources as their counterparts, the profit oriented entrepreneurs. On the other hand, it can be argued that lifestyle entrepreneurs are able to create better products because they are *“experienced customers, who either make a profession out of their hobby or seek customer solutions in the respective leisure or tourism industry”* (Peters et al. 2009, p. 400). Thus it is interesting to see whether motivations and the activities offered actually do affect local value creation.

Nature-based tourism is also often accused of being heavily subjected to seasonality (Saarinen 2003). Seasonal fluctuations will often lead to ineffective use of resources, and hence reduce value creation. This is especially seen when it comes to workforce. Seasonality results in a high degree of part-time jobs, which may not be very appealing to people in the long run. The result might be very high training costs because new staff must be hired and trained every season, even if we are talking about small businesses where informal training is the norm (Storey & Greene 2010). Additionally, the overall quality of the product or service offered can suffer by lacking competence and experience. Krakover (2000) distinguishes between core and peripheral labor groups. The core group is staff with skills that are short in supply, and who are able to perform a wide variety of tasks. They will be highly valued, while staff belonging to the peripheral group is more easily replaced with the changing seasons.

Tourism as a tool for development

Tourism is popularly seen as a useful instrument for regional development by *“introducing new, external sources of monetary income and opportunities to work in the regional economy and its operational cycle”* (Saarinen 2003, p.1). Much of the research on the subject has been focused on

developing countries, with examples such as Gurung and Seeland (2008); Place (1991) and Walley (2004). But the idea is also increasingly popular among developed countries where, as we have seen, globalization and demographic trends are changing the way of life in rural communities (Murphy & Murphy 2001; Sharpley 2002). While the focus in developing countries often lies upon generating foreign exchange, developed countries typically are more concerned with tourism as a means of employment generation, distribution of spending and regional development (Mihalic 2002; Sharpley 2002; Wall & Mathieson 2006).

But, like Hall and Boyd (2005, p. 5) point out, *"(...)nature-based tourism in peripheral areas (...) has a difficult balancing act between achieving regional development objectives and retaining high levels of naturalness(...)"*. Even the term "development" can be accused of being vague and non-specific, and its perceived content has evolved throughout the years. According to Sharpley (2002, p. 27) it is now *" a complex, multidimensional concept which not only embraces economic growth and "traditional" social indicators, such as healthcare, education and housing, but also seeks to confirm the political and cultural integrity and freedom of all individuals in society"*.

If tourism is to bring long term benefits to a region it must be developed in a sustainable manner. Sustainable development is typically said to consist of three equally important factors: environmental, social and economic sustainability (World Commission on Environment and Development 1987), and also contemporary research focus on the balance between the three aspects. In Norway, Haukeland and Brandtzæg (2009) are promoting the term "broad value creation". Internationally, the interrelated concepts of ecotourism (see for example Gautam 2010; Haaland & Aas 2010; Weaver 2002), sustainable tourism (see for example Butler 1999; Pereira & Mykletun 2012) and community-based tourism (see for example Okazaki 2008) receive much attention.

According to Mehmetoglu (2007, p. 94, my translation), though, *"all tourism is developed with economic incentives"*. Thus the economic aspects are considered first, whereas the social and environmental aspects are considered under the framework of the economic ones - if the planned

tourism development is not economically viable, it will not be an interesting object for investment.

Economic development

Local economic impact

The economic impact of any activity can be divided into direct, indirect and induced economic impacts (Fletcher 1989). Direct economic impacts are “*those resulting directly from constructing or operating the project – jobs created, wages paid, tax revenues generated*” (Klemperer 1996, p. 494). In a tourism context this will be the jobs, wages and profits made in businesses catering directly to the tourist. As a result of the direct impact, there will be multiplier effects. First off, the increased economic activity directly related to tourism demand will result in an increased turnover in sub-suppliers, known as the indirect impact. Secondly, profits and wages arising from the direct and indirect impact will give increased purchasing power among investors and employees. This gives an increased demand in other parts of the economy, and is known as the induced impact.

Instead of remaining in the local community where it could keep giving multiplier effects, part of a business` expenses will be spent elsewhere. These represent leakages, and include for example products, services and labor sourced from outside of the community. (In the big picture, the amount of the profit and wages resulting from the business which are spent outside of the community also represent leakages. See figure 1 for a schematic presentation.) If tourism is to promote regional economic development effectively, such leakage must be minimized. Local control, local employment and local entrepreneurship are all considered principles for the development of sustainable tourism destinations (Mehmetoglu 2007). Foreign investors, for example, give higher leakages than local ones. This is of course a result of profits going directly out of the country, but foreign companies also tend to use more foreign staff and imported goods (Mihalic 2002, p. 86), giving even higher leakages.

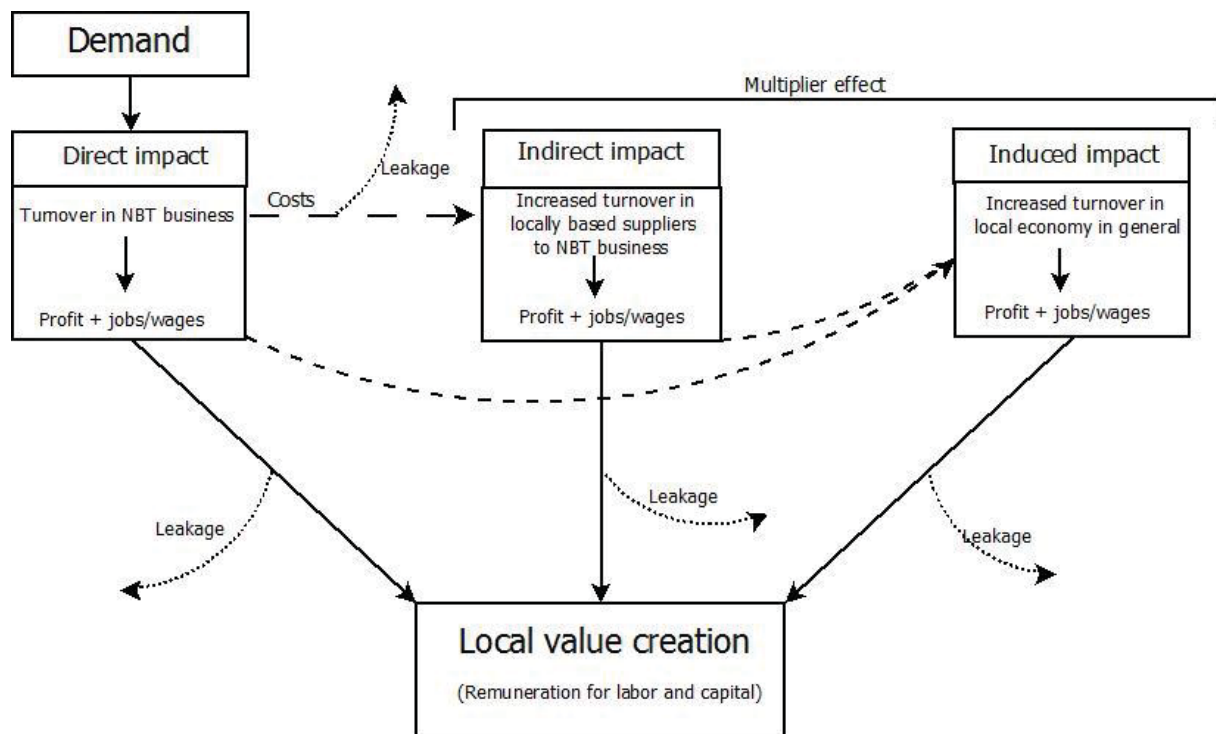


Figure 1: The local economic impact of nature-based tourism (partly based on Saarinen (2003, p. 95) and Fiske et al. (2012, p. 15)).

Labor

Being a labor intensive industry, tourism has the potential to generate many jobs. According to Mihalic (2002, p. 102) the tourism economy can even “*arguably be described as the world’s single largest source of employment (...) providing up to 11% of global employment*”, although she then also includes construction, finance and other related industries. Wall and Mathieson (2006, p. 82) says that “*when compared with many other industries, tourism requires employees with relatively low levels of job specialization*”, arguing that tourism in this matter is fitted to absorb local vacant work forces in rural communities. Some aspects of the working conditions in the service sector (low wages, untraditional working hours, low status), though, may make working in the tourism sector non-appealing to local residents so that foreign workers are used (Mihalic 2002, p. 104). On the other hand, she also argues that since jobs within tourism often are non-permanent (seasonal or part-time) they have the possibility to absorb students, retired people and others not really considered part of the working population. This will have a positive effect on the economic development. The situation is made more complex, though, when Wall and

Mathieson (2006, p. 82) admit that as a destination matures higher skilled labor will be needed. If this is not found locally, labor must be sourced from the outside, making it relevant to look at whether need for special competence affects local value creation.

Labor intensive industries generally have a lower income leakage than capital intensive industries because they create more employment, wages and tax income (Klemperer 1996). This falls in under what Paajanen (1994) calls “*tourism demand factors*”. She also identifies two other factors affecting tourists` expenditure and income leakage. “*Destination area factors*” include the point that small communities typically have higher leakages than larger ones, since they are less likely to provide all the resource inputs needed to run a business. The third category, “*tourism supply factors*” indicates that a destination with a varied and interesting supply of tourism services will be more attractive to visitors.

In Finland, Saarinen (2003) found a pattern when comparing three destinations: The municipality Kuusamo employed a higher percentage of local residents (92%) than the municipalities Inari (77%) and Pelkosenniemi (59%). Kuusamo had a higher degree of income from recreation and other services (20%) than Inari (7%) and Pelkosenniemi (1.3%). Apparently this can be explained by “*a need for local knowledge in the business environment and nature-based activities and skills in recreation services, which encourages the tourism industry to employ local people*” (p. 104). Another Finnish study also indicates the same thing. In their study on nature-based tourism in the municipality Kuhmo a very high income leakage of 48% was found (Rinne & Saastamoinen 2005). Although this sounds alarming, a lot can be explained by the fact Finnish study included all expenditures that the nature-based tourists had in the municipality. The highest leakage was (not surprisingly) found in the retail trade, whereas leakage in accommodation and nature-based recreation was low.

On the other hand, a Swedish study concludes that supply and demand of nature-based tourism have difficulties to meet, and that this industry therefore only is a good alternative when other possibilities are lacking and unemployment is present (Lundmark & Müller 2010). Hence it can be argued that nature-based tourism often arises due to a lack of other ways to make money

(Peters et al. 2009), but that it under the right circumstances does have the qualities to improve regional economies.

Development of successful destinations

Wall and Mathieson (2006, p. 85) list four conditions which the construction of a successful tourism destination relies upon:

- i) *The mixture, quality and prices of facilities and services being offered;*
- ii) *The existence of a skilled and experienced organizational body and the quality and level of marketing in tourist-generating countries;*
- iii) *The geographical location of the destination area in relation to the main tourist generating regions, and the ability of the destination to capitalize on the advantage of being well located, or to ameliorate the disadvantages of being poorly located;*
- iv) *The nature and origin of financial investment.*

Mixture of facilities and services:

In accordance with Paaanen's tourism supply factors, an attractive tourism destination will offer a good composition of facilities and services complementing each other and giving a complete package (Kamfjord 2011). Additionally, a complex and varied economic system will be subject to less leakages than a simple one (cf. Paaanen's destination area factors). This is a big issue regarding rural development, since internal economic linkages in the periphery typically are weaker than in more central areas due to their propensity to import goods and services (Archer 1989). Additionally, business size matters with regards to how quickly a business can adapt to change in demand. According to Storey and Greene (2010) smaller businesses are much more flexible in this sense than larger ones. These factors make it interesting to look at whether the size of the business and the activities offered by a business affects local value creation.

Organizational body and geographical location:

Murphy and Murphy (2001) stress that any tourism destination will be changed because of tourism, so entering the world of tourism should be a deliberate choice backed up by thorough planning and management. They also underline the fact that tourism has become "*a very crowded and competitive industry, where the tourist consumers have become more sophisticated and*

demanding over time” (p. 7). Therefore, nature-based tourism products must represent something unique about that area – something not all destinations have. Additionally, a destination’s geographic location relative to their market can influence their competitiveness. The price of transportation is one reason, but increasingly also the time spent travelling to and from the destination is becoming a critical factor, since travels with short time-spans are becoming more and more popular (Borch 2012).

But even genuinely unique and well-located destinations will not necessarily be successful. In the Swedish context, Fredman and Tyrväinen (2010 p. 186) stress that nature-based tourism in practice is *“squeezed between many public sectors such as environment, forestry and agriculture, business development, and none of these sectors have fully adopted nature-based tourism as a key development area.”* Also in Norway careful planning and marketing of tourism is challenged by unclarity concerning who are responsible for what. For example, the total tourism package discussed previously does not only include transport, accommodation and activities – even the supply of basic infrastructure, such as roads, sanitation and health services will have to match the amount of visitors (Frost 2004). Such infrastructure has even been called *“the secondary tourism resource base”* (Sinclair & Stabler 1997, p. 150), and with government funding being based on population size, local authorities can face difficulties financing these when experiencing rapid growth in tourism (Müller et al. 2004). This issue is, for example, municipalities where mountain cabin development is booming (see for example Kaltenborn et al. 2007). When it comes to marketing *Innovation Norway* has the operational responsibility for developing and marketing tourism, but many other institutions are also directly involved, in addition to all the institutions that are indirectly involved. At the regional and local level, the existing organization of Norwegian tourism is characterized by a myriad of poorly cooperating destination organizations and tourist boards. Some areas are covered by several companies, while other areas might not be covered at all. This problem that is recognized and set on the agenda in the national tourism strategy (Nærings- og handelsdepartementet 2012). All in all, it is reasonable to think that there will be regional differences in local value creation.

Financial investments:

It is important to keep in mind that a destination experiencing too quick growth rate often excludes local people because they are not able to respond to the demand. For example, in a Costa Rican case study Place (1991) found that with a heavily increasing amount of tourists the interest from financially strong external investors excluded local people from taking part in the development. This strongly increases income leakage, and thus reduces the economic benefits for the local community. Although this study was done in what might be called a developing country, the same tendency can be seen in Norway. Thus it is highly relevant to distinguish between locally and non-locally registered businesses.

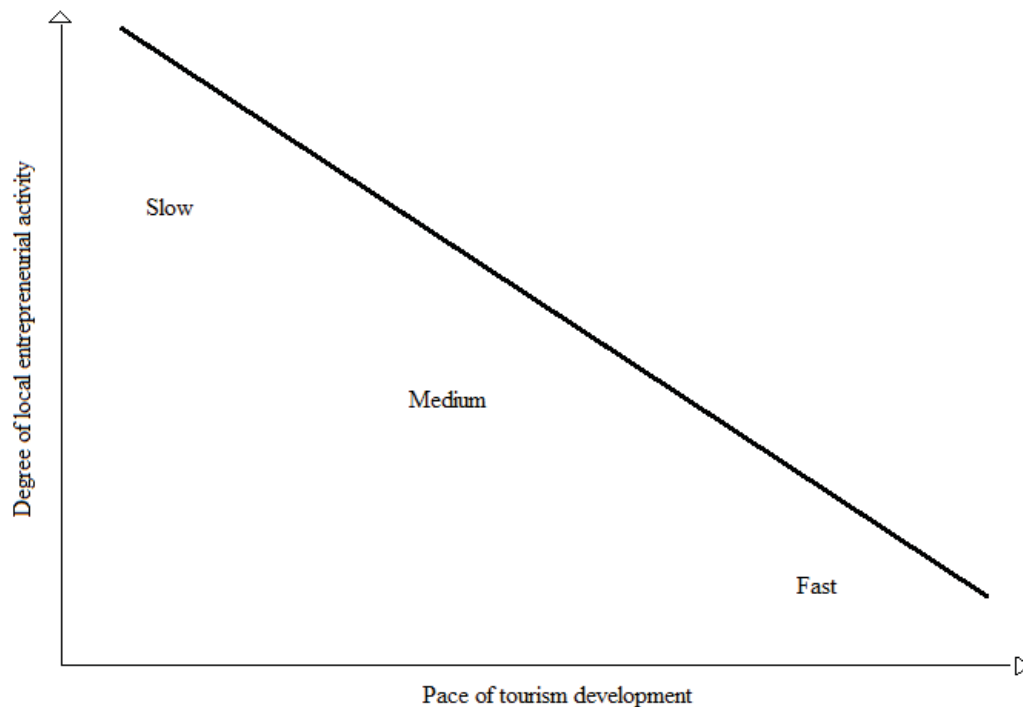


Figure 2: The relationship between how fast development happens and how involved local entrepreneurs are (after Mehmetoglu (2007, p. 101)).

Research questions

Research question one aims to map average business contribution to rural economic development, while research question two seeks to explain the variation in local value creation among Norwegian nature-based businesses through exploring covariation:

- I. How good local value creators are Norwegian NBT businesses?
- II. What affects variation in local value creation among Norwegian NBT businesses?
 - a. Does motivation affect local value creation?
 - b. Does business size affect local value creation?
 - c. Does seasonality affect local value creation?
 - d. Does competence need affect local value creation?
 - e. Does geographic location affect local value creation?
 - f. Does the type of activities offered affect local value creation?
 - g. Does business phase affect local value creation?

In this way, lessons can be learned about nature-based tourisms effectiveness as a current development tool, and whether actions can be taken to make it more effective.

Data and methods

Definition

Because nature-based tourism is not a previously defined industry in Norway, a database had to be established. This requires a definition, and since there is no universally accepted definition of nature-based tourism, this task had no obvious solution. The definition of choice was “*Nature-based tourism is human activities occurring when visiting nature areas outside the person’s ordinary neighborhood*”, based on Fredman et al. (2009, p. 25) and Lundberg and Fredman (2011, p. 3). This definition, as well as the further operationalization of it, was designed so that his work can be compared to work being done at the Mid Sweden University. Like Lundmark and Müller (2010), we only included commercial businesses, and the main focus lay upon the supply of activities. Businesses supplying only transportation and/or accommodation were not included unless they had a very clear nature-based profile, such as tree-top hotels and guided cruises. Further, businesses operating solely in developed arenas¹ were excluded, such as farm stays and ski lifts. Providers of fishing and hunting rights were not included unless they provided a fuller product including guiding or accommodation.

Establishment of a nationwide database of NBT businesses

The first phase of the work on establishing this database consisted of asking all Norwegian tourist offices (n = 291) for information on nature-based tourism businesses operating in their region. This process was conducted early spring 2012, and included an initial phone call, where after a form was sent for them to fill out. Two reminders were sent after one and two weeks. 125 tourist offices (43%) replied, resulting in information about 1256 businesses. This covered 57% of the Norwegian municipalities and 62% of the land area. A preliminary quality control was performed through information on business websites and general information found elsewhere. 433 (35%) were removed² in this process, giving a total of 823 approved businesses. Further, the websites of all the tourist offices (n = 291), as well as the websites of several destination marketing organizations (n = 81) and four nationwide trade associations³ were searched for additional

¹ This was done based on the Scandinavian concept of “utmark” versus “innmark”.

² Typical businesses that were removed: Cafes, zoos, tour operators, museums, spas, tourist roads, cultural centers, aquariums. More tricky examples include farms, horse riding clubs, veteran boats and mountain boards. These were only included when providing guided nature-based activities and/or hire of equipment.

³ HANEN, Visit Norway, Verdifull Jakt and Inatur

businesses. Also, Google searches were performed linking the place name of the 291 tourist offices with the work “*naturopplevelser*” (nature experiences). The 20 first hits were checked out. This process brought about information about 708 new businesses, giving a total of 1531 businesses.

Because of possible bias of the database at this stage, further work was done to supplement it during the summer and autumn of 2012. Regarding the tourist offices, problems included the low total answer rate (43%) as well as poor answers. Only 33% reported that they had an overview of the NBT businesses in their area, and control of webpages supported low coverage. Wide spread misinterpretation of the NBT-definition was also present. Google searches were suspected to lead to an overrepresentation of larger businesses. Smaller businesses, especially within hunting and fishing, were thought underrepresented.

Three steps were taken in the second supplementing phase. First, a number of selected websites⁴ were searched for information about businesses fitting our definition, resulting in a total number of 184 additional businesses. The second step comprised of Google searches combining certain key words⁵ with the name of the Norwegian municipalities, one by one. The 20 first hits from each search were checked, and businesses fitting our definition were added to the database continuously giving a total number of 269 businesses from step two. The third step was included in order to pick up businesses around important fishing rivers that was not covered by the web pages in step one. This was also based on Google searches, but this time combining the word fishing with the names of certain rivers⁶. Although covering a total of 10 rivers, this only resulted in 4 new businesses.

A quality control of three steps was performed. First, encompassing lists of suppliers within dog mushing and nature photography provided by experts within the field showed that the database

⁴ www.lakseelver.no (n=70), www.fisketurisme.no (n=10), www.padi.no (n=11), www.midtnorskatur.no (n=12), www.fiskeinord.no (n=7), www.wild-norway.com (n=4), www.norgesmidtpunkt.no (n=1), www.finn.no (n=3) and www.naturvernforbundet.no/naturguider (n=9), as well as large amount of webpages concerning our national parks, found through www.nasjonalparksenter.no (n=57).

⁵ Nature guiding/ “naturguide” (n=20), riding/”ridning” (n=101), sledging/”sledekjøring” (n=16), sailing/”seiling” (n=42), scuba diving/”dykking” (n=28), speleology/”grottevandring” (n=0) and kayaking/”kajak” (n=62).

⁶ Repparfjordelva (n=1), Reisavassdraget (n=2), Drammenselva (n=1), Tanaelva (n=0), Gaulavassdraget (n=0), Orkla (n=0), Orkla (n=0), Altaelva (n=0), Namsenvassdraget (n=0), Målselvvassdraget (n=0) and Tengs- og Bjerkreimselva (n=0).

had coverage of 62.9% within dog mushing and coverage of 37.5% within nature photography. The 38 previously unknown businesses were added to the database. Second, a member register from Norway Nature Travel (Din Tur AS) was cross-referenced. Of their 218 members fitting our definition, we already had knowledge of 81 of these (37.2% coverage). The 137 previously unknown businesses were added to the database. Third, encompassing lists of NBT-businesses in nine municipalities⁷ were consulted, showing a mean coverage of 55%. From these lists, as well as non-encompassing lists from five other municipalities⁸ 32 businesses were included in the database.

Lastly, double entries (n = 101) and businesses double checked and found to not fit the definition (n = 32) were removed, giving a gross sample of 2030 businesses.

Questionnaire design

The questionnaire was developed after principles in Dillman et al. (2009) as a collaboration between four researchers and three students at the Norwegian University of Life Sciences and a researcher at Mid Sweden University. It was built in 8 sections, covering different aspects of the businesses; their supply of NBT-products, use of national parks, business organization and location, objectives, competence and success factors, certification, economy and information about owner/manager.

A pilot test was performed (see: Dillman et al. 2009, p. 228) where 15 businesses from the database were contacted by telephone before and 6 days after receiving a preliminary survey. One reminder was sent after 3 days. 8 of the contacted businesses answered the survey, giving us constructive feedback in the process of finishing the actual survey. Some questions were altered, removed and shortened.

Data collection

Distribution and reminders

⁷ Hol (1), Rollag (n=6), Aurland (n=4), Hattfjelldal (n=6), Vefsn (n=3), Grane (n=4), Moskenes (n=0), Kåfjord (n=2) and Porsanger (n=0).

⁸ Voss (n=2), Lærdal (n=2), Vik (n=0), Leikanger (n=1) and Sogndal (n=1).

As recommended by Dillman et al. (2009, p. 243), an email was sent out three days in advance of the survey giving the businesses a heads up ($n = 1983$)⁹. Finally, the survey, made in the online survey service *Questback*, was sent to 1929 respondents¹⁰. In line with principles from Dillman et al. (2009) media attention was created¹¹, and reminders were sent by SMS¹² and email¹³.

Response rate and further restrictions to the valid sample

Data collection was performed during February and March 2013. The removal of double entries ($n = 21$), closed down businesses ($n = 59$), businesses outside the target group ($n = 103$), incorrect email addresses ($n = 14$), and the addition of new email addresses ($n = 7$) and businesses ($n = 28$) gave a valid sample of 1769 businesses. The response rate was 35%, resulting in a selection of 616 businesses.

Because the response rate for the economic section was quite a bit lower than general, in addition to a high degree of poor answers, this was not set as the valid selection of this paper. A further quality control of the respondents had to be performed. First, the outlier labeling rule was used on the variable representing degree of local value creation (see “variables and data analysis”), where a multiplier of 2.2 was used, as this is more suited than the commonly used multiplier 1.5 (Hoaglin & Iglewicz 1987). This resulted in a valid range of $[-1.35022, 2.16302]$, and excluded 351 respondents whereof 337 had missing values. Further, six arguments¹⁴ were applied to remove answer combinations which made no sense, resulting in the removal of 53¹⁵ more respondents. Finally, the valid selection was set to 211 businesses, representing 12% of the valid sample.

⁹ Net sample ($n=2030$) excluding pilot test survey ($n=15$) and businesses missing email addresses ($n=32$).

¹⁰ 184 addresses were incorrect, but through Google searches 126 of these were replaced. Two respondents informed us they were out of business, and six of the non-replying businesses from the pilot test were willing to answer the main survey.

¹¹ Media coverage included a newsletter from Innovation Norway, four articles in regional newspapers and articles in the nationwide newspapers *Nationen* and *Bondebladet*. Information was also spread through relevant Facebook-pages.

¹² After 5, 7 and 15 days.

¹³ After 12 and 22 days.

¹⁴ No NBT expenses combined with a percentage NBT salary-expenses over 0 (11 hits). No nature-based tourism full-time equivalents (FTEs)s combined with salary expenses over 0 (0 hits). NBT FTEs over 0 combined with no salary expense (51 hits). No NBT FTEs and no NBT salary expenses (0 hits). Location for registration not answered (1 hit). Extremely unrealistic ratio of salary to amount of FTEs (2 hits).

¹⁵ This number is lower than the total number of hits due to some degree of overlap.

Data analysis and variables

Local value creation

Because many operators have nature-based tourism only as a part of their total business portfolio it was suspected that a separate account related to (and hence an overview over) nature-based tourism activities alone would be found only in rare cases. Respondents were therefore asked to report their total turnover as well as to indicate how large a percentage of this was related to their NBT-operations. Turnover could then be calculated indirectly. Total NBT-expenses were, however, measured directly, since it is often easier to estimate. Salary expenses were calculated from a percentage of the total costs estimated by the respondent.

For the purpose of comparison, local value creation was calculated as a percentage of the turnover. The following equation sums up how this was done:

$$(1) \quad \text{Relative local value creation} = \frac{(\text{turnover} - (\text{total expenses} - \text{salary expenses})) - \text{leakages}}{\text{turnover}}$$

The part in brackets represents total value creation (profit + salaries), which is the same as value creation when leakages are absent. Leakages were defined differently for locally and non-locally registered businesses. For locally registered businesses it was assumed that profits remained locally, in addition to the local salary. Thus leakages were represented by non-local salary expenses alone:

$$(2) \quad \text{Leakages}_{\text{local business}} = \text{salary expenses}_{\text{non-local employees}}$$

For non-locally registered businesses it was assumed that nothing but the local salary remained locally:

$$(3) \quad \text{Leakages}_{\text{non-local business}} = \text{total value creation} - \text{salary expenses}_{\text{local employees}}$$

Locally registered businesses were defined as those who are registered and operate in the same municipality. (There was made no distinction between businesses operating only and partly in the municipality of registration.) Salary expenses were distributed amongst local and non-local workers based on a reported amount of full-time equivalents (FTEs) for each group.

Businesses' scores on the relative local value creation-variable were investigated through descriptive statistics. Cluster analysis based on this variable resulted in no meaningful groups, so for the purpose of comparison, a manual grouping of the respondents was performed. Here, respondents were grouped depending on their score on the local value creation variable, and labeled into one of four groups; negative (<1%), low (1-33%), medium (34-66%) and high (67-100%) local value creators.

Regression model

In order to investigate what affects variation in local value creation among Norwegian NBT businesses a regression model was applied. A backwards ejection linear regression model was chosen in order to reduce the large amount of explanatory variables. Cases were excluded list-wise. The relative local value creation-variable (equation 1) was used as dependent variable, while the independent variables were:

- *Geographic location*: The region where the business operations happened. Whenever a business operated in different regions, the most important region was used. The regions used were the classical division of Norway into Svalbard, Nord-Norge, Trøndelag, Vestlandet, Sørlandet and Østlandet. For the regression analysis, dummy variables were created using Østlandet as the reference category.
- *Seasonality*: The economic importance of the seasons January-April (winter), May-August (summer) and September-December (autumn) was measured on a 7-point scale with only the endpoints given verbal labels. The scale ranged from 1 ("no importance") to 7 ("very high importance").
- *Business size*: Measured in the total amount of nature-based tourism FTEs (local and non-local FTEs summarized).
- *Activities offered*: The economic importance of 11 categories of economic activity was measured on a 7-point scale with only the endpoints given verbal labels (1 = "no

economic significance”, 7 = “very high economic significance”). The categories were: *“Paid guided activities in nature”, “self-guided activities”, “sales of outdoors equipment”, “production/organization of events/festivals in nature”, “accommodation”, “transportation (in a tourism context)”, “food serving/production of local food”, “tour operator activities”, “dissemination of information (tourist information office, visitor center)”, “agriculture/forestry” and “fishery/commercial fishing”.*

- *Need for competence:* Respondents reported whether or not they required more competence within 10 categories: *“management, organization”, “economy, marketing, sales”, “food serving, accommodation, transportation”, “product development, creativity”, “guiding, interpretation”, “natural resource management, nature knowledge”, “law, land management”, “climate, sustainability”, “society, politics, culture” and “languages other than Norwegian”.* For the regression model, a dummy variable was created for each category.
- *Motivation:* The priorities for 11 motivational factors were also measured on a 7-point scale, this time ranging from 1 (“very low priority”) to 7 (“very high priority”). The motivational factors were taken from Lundberg and Fredman (2011) and Stensland (2010), and included *“maximize profit”, “secure and stable income”, “independence”, “interesting job”, “be able to live where we live today”, “be able to work outdoors”, “use local natural resources for economic activity”, “social contact with customers”, “give customers a good nature experience”, “convey attitudes towards nature to customers” and “contribute to sustainable tourism development”.*
- *Business phase:* In order to adjust for potential differences in business phase, a variable measured through the mutually exclusive alternatives *“startup”, “growth”, “mature/stable phase”, “downsize” and “liquidation”* was included. For the regression analysis dummy variables were created, using growth as the reference category.

Restrictions

Much has been written about the economic impact of tourism, and complex models for measuring both direct and multiplier effects have been developed. Transportøkonomisk Institutt (TØI), for example, has published reports for many Norwegian regions (see for example Dybedal 2003; Dybedal 2006; Farstad & Dybedal 2012). But when it comes to measuring the impacts of certain

aspects of tourism, such as nature-based tourism, it gets quite complicated. There are also examples of successful use of secondary data (such as Forbord 2012), but in the case of nature-based tourism gathering of primary data was found to be necessary. This has limited the research in this paper to focus on the direct economic impact. According to Wall and Mathieson (2006, p.71) it is not uncommon to face these issues within tourism research:

“[D]espite the growing sophistication of the models and the availability of data sets, the data are often inadequate or inappropriate, so that the results may be unreliable and difficult to use to support policy and planning decisions. The resulting need to constantly adapt existing data or collect new data at great expense has often diluted the accuracy of the model outputs.”

A second restriction is the size of the valid sample ($n = 211$) which represented only 12% of the valid selection ($n = 1769$). A large part of the reason is the relatively low response rate (35%) for the entire survey, but compromises made in the questionnaire designing process probably also played its part. Similar work shows that it is hard to obtain a high response rate in this field. Tourism British Columbia (2005), for example, obtained information about 13% of the NBT-businesses in the state, while Hodur et al. (2004) had a response rate of 24.6% on their questionnaire to NBT-operators in North Dakota. A possible explanation is that it is a fragmented and non-professionalized industry, so leaders might not have overview and/or awareness of the information needed to reply. Regarding the questionnaire, it turned out quite comprehensive, and the economic questions (which naturally were the most complicated as such) were made voluntary for the sake of not spoiling the total response rate. This gave a lower response rate for this part than for the questionnaire as a whole. Additionally, the use of open-ended questions resulted in a lot of unusable answers. Since the total amount of Norwegian NBT-businesses is unknown it is hard to tell how well the sample covers. A fair estimate would be to expect the total population to lie somewhere between 2000 to 5000 businesses, which indicates that the sample covers somewhere between 4 to 12% of the actual Norwegian NBT-industry.

Another restriction is that the chosen method, regression, only takes into account variables which show variation. If there is no variation in the data, it will not be detected as predictor even though it might be. Stepwise ejection models, where variables are removed one by one until a final model of (hopefully) relevant predictors is established, have especially been accused of

eliminating predictors of significance through suppressor effects, although the backwards ejection model used here supposedly is the least problematic among them (Field 2009, p. 213).

Furthermore, because the calculation of local value creation was based upon a distinction between locally and non-locally registered businesses, their local value creation would inherently differ. It was therefore found unsuitable to include this distinction in the regression analysis. Since the vast majority (88.2%) of the sample was found to be locally registered this is not of big concern.

Results

General characteristics

Table 1 lists the economic importance of certain activities in the total business portfolio, as well as the motivations driving business owners. Since the activities offered counts for the total business portfolio not all are directly concerned with nature-based tourism. Nonetheless, tourism activities on average are of the highest economic importance among businesses. Agriculture, commercial fishing and sales of equipment are of lower economic importance, and might represent supplementary economic activities. Motivations generally had very high scores and quite narrow distributions. Yet some trends can be seen, with typical lifestyle entrepreneur traits on average having the highest scores.

Table 1: Characteristics of the sample: Activities offered and motivations.

Activities and motivations	<i>N</i>	<i>M</i>	<i>SD</i>
Economic importance of activities offered (total business portfolio) ^a			
Paid guided activities in nature	211	4.73	2.30
Accommodation	210	4.68	2.37
Self-guided activities	211	3.93	2.31
Food serving/production of local food	210	3.77	2.29
Production/organization of events/festivals in nature	210	3.50	2.15
Tour operation	209	3.32	2.19
Transportation (in a tourism context)	210	3.22	2.29
Dissemination of information (tourist information office, visitor center)	211	2.91	1.93
Agriculture/forestry	207	2.26	1.81
Fishery/commercial fishing	206	2.20	1.92
Sales of outdoors equipment	211	1.81	1.37
Motivations ^b			
Give customers a good nature experience	211	6.58	0.73
Interesting job	210	6.12	1.06
Convey attitudes towards nature to customers	210	6.10	1.22
Contribute to sustainable tourism development	211	6.10	1.23
Use local natural resources for economic activity	208	5.98	1.41
Work outdoors	210	5.93	1.33
Social contact with customers	211	5.77	1.22
Secure and stable income	210	5.72	1.40
Independence	208	5.58	1.33
Live the same place as today	210	5.51	1.72
Maximize profit	210	4.80	1.59

Note: ^aRespondents were asked to rate each category according to their impact on the turnover of the total business portfolio. The scale used ranged from 1 (no importance) to 7 (very high importance).

^bRespondents were asked to rate each category according to their priority in the daily operations of the business. The scale used ranged from 1 (low priority) to 7 (very high priority).

Table 2 shows the distribution of binary variables from the questionnaire. The selection included businesses from all regions, and amount of businesses within each region do to a certain extent

reflect the size of each region. Most businesses reported to be in a growth or mature/stable phase, and the vast majority of businesses were registered locally.

Table 2: Characteristics of the sample: Where businesses operate, whether they are registered locally, and which phase they are in.

Category	n	Valid percentage
Region ^a		
Nord-Norge	65	31
Østlandet	60	28
Vestlandet	53	25
Trøndelag	24	11
Sørlandet	6	3
Svalbard	3	1
Locally registered ^a		
Yes	186	88
No	25	12
Business phase ^b		
Startup	17	9
Growth	108	54
Mature/stable	71	36
Downsize	2	1
Liquidation	2	1

Note: ^aN=211, ^bN=200.

Table 3 shows the reported need for competence in the sample. There was generally need for competence within traditional economy and business operation fields, but also competence within fields more directly related to the NBT-product (guiding/interpretation and languages) were found to be lacking. The three least needed categories are probably represented by more idealistic businesses, as they are more related to general development than business operations.

Table 3: Characteristics of the sample: Amount of businesses reporting a need for competence within different categories.

Category of competence	Percentage who need more competence
Economy, marketing, sales	63
Product development, creativity	50
Guiding, interpretation	33
Languages other than Norwegian	32
Management, organization	28
Natural resource management, nature knowledge	28
Food serving, accommodation, transportation	22
Law, land management	13
Climate, sustainability	11
Society, politics, culture	9

Note: $N = 211$ for all variables.

Figure 3 represents the seasonality experienced by respondents. As a whole, the summer season (May-August) is the absolutely most important one. The winter season (January-April) is of very high importance to some businesses, but it is also the season which is of no importance to the highest number of businesses. The autumn season (September-December) is of low economic importance to most businesses.

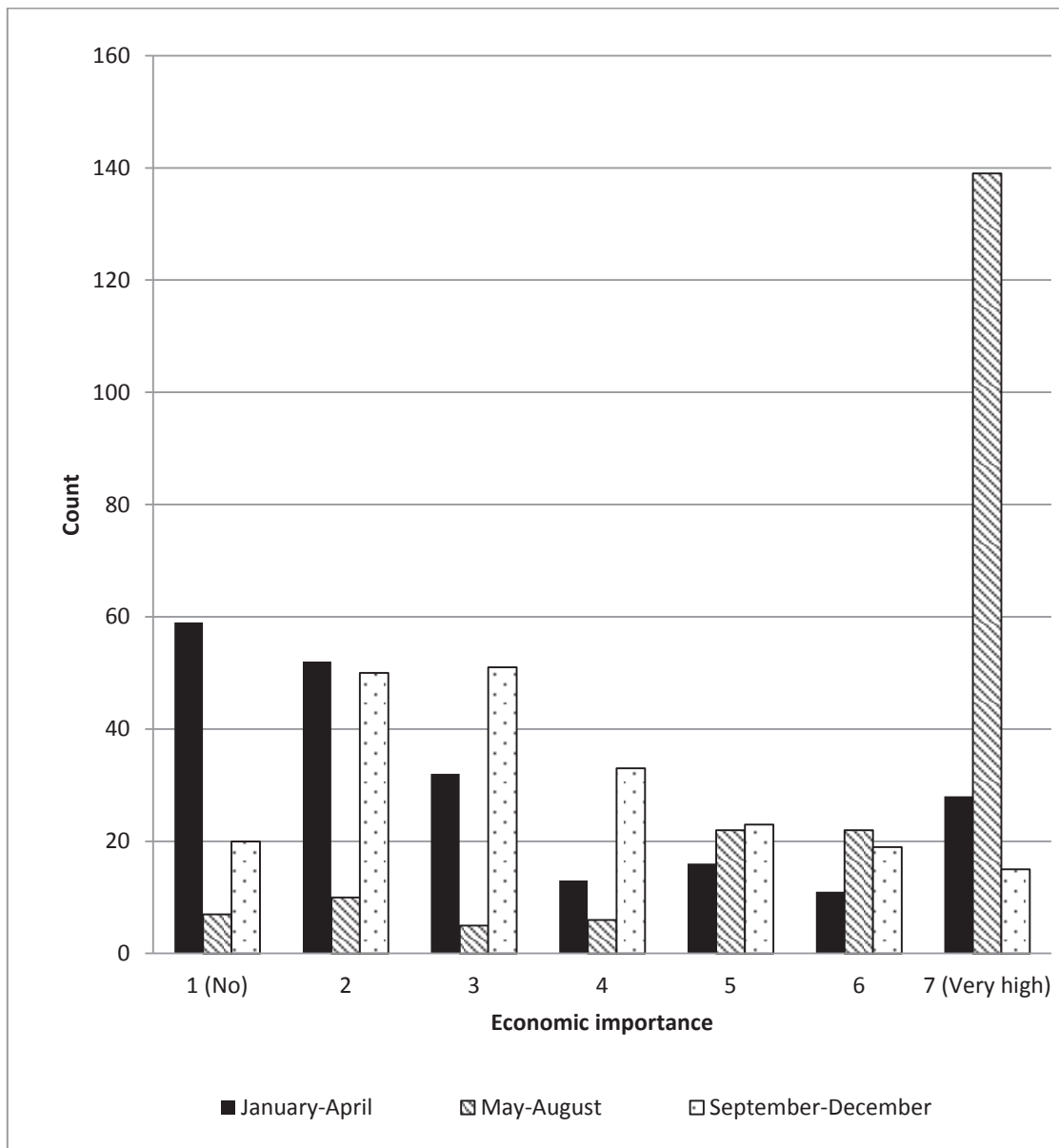


Figure 3: Characteristics of the selection: Economic importance of seasons. (The total amount of scores on the question asking the importance of each season for the turnover in nature-based tourism products.)

How good local value creators are Norwegian NBT businesses?

Table 4 shows the average local value creation in the total sample, and in the predefined groups. The average scores on the main variables used in the calculation of the local value creation are also shown.

Table 4: Background variables for calculating local value creation in the total valid sample and group wise.

Background variable	Total	Groups based on local value creation in percentage of turnover			
		Negative (<0%)	Low (0-33%)	Medium (34-66%)	High (67%<)
<i>N</i>	211	23	71	57	60
Local value creation ^{ab}	39% (44%)	-47% (43%)	17% (11%)	53% (9%)	84% (10%)
Total value creation ^{ac}	46% (63%)	-32% (42%)	27% (85%)	60% (14%)	84% (16%)
Locally registered	88%	100%	69%	97%	98%
Local workforce ^a	76% (33%)	73% (32%)	66% (38%)	79% (30%)	86% (28%)
Total amount of FTEs ^a	3.06 (1.68)	4.52 (11.39)	3.20 (4.36)	3.64 (7.09)	1.78 (1.78)
Turnover in mill. NOK ^a	1.56 (2.20)	0.91 (1.11)	1.86 (3.09)	1.56 (2.36)	1.45 (3.57)
Total costs in mill. NOK ^a	1.23 (2.20)	1.63 (2.09)	1.85 (3.02)	1.09 (1.78)	0.47 (0.79)
Salary costs in mill. NOK ^a	0.53 (1.04)	0.48 (0.51)	0.70 (1.25)	0.56 (1.24)	0.31 (0.61)

Note: ^aNumbers shown as mean (SD). ^bSee equation 1. ^cEquation 1 with leakages ignored.

Results from the regression analysis: What affects local value creation among Norwegian NBT businesses?

The regression analysis comprised of 40 steps including 195 cases. Coefficients for the last step of the regression analysis are shown in table 5; a model which explains 11% of the variation in relative local value creation and is significantly better than just comparing means. Visual inspection of charts and plots showed that assumptions were met, and inspection of correlations revealed no problems with multicollinearity. VIF and tolerance of the excluded variables were also within acceptable limits.

Table 5: Multiple regression model explaining variation in relative local value creation. $R^2 = 0.11$ (SE = 0.39), $F(6,188) = 3.66$, $p < 0.002$.

Independent variables	B	SE_B	β	t
(Constant)	0.08	0.15		0.52
Dependency on season: September-December	0.03	0.02	.12	1.73*
Nature-based tourism FTEs, total	-0.01	0.01	-.21	-2.86***
Economic importance: Transportation (in a tourism context)	-0.03	0.01	-.17	-2.22**
Economic importance: Food serving/production of local food	0.03	0.01	.14	1.76*
Need for competence: Guiding, interpretation	-0.12	0.06	-.14	-1.94*
Motivation: Social contact with customers	0.06	0.02	.16	2.31**

Note: Dependent variable: Relative local value creation (equation (1)). B = unstandardized coefficients. SE_B = Standard error of unstandardized coefficients. β = standardized coefficients. t : Two-tailed t-test. * $p < 0.10$, ** $p < 0.05$, *** $p < 0.01$.

Discussion

Local value creation

The first research question of this article was “*How good local value creators are Norwegian NBT businesses?*” With a mean of 39% (N = 211, SD = 44%), the selection on average included reasonably good local value creators, but the distribution was spread. While most businesses had a better value creation than the mean, 23 respondents out of the selection of 211 showed a negative local value creation, reaching as a low as -130%. Thus the mean is quite affected by the negative local value creation-group. This group characterized by economic loss, as can be seen from the economic values in table 4, which means that they are not necessarily “bad” local value creators in terms of being businesses with high leakages - they are just not very economically solid businesses.

Interestingly, variation in local value creation seems to be mostly affected by the economic performance of businesses, since the direct leakages generally were very low with only 11.8% of businesses having non-local owners and only 24% of the total workforce being non-local. Overall, the general economic performance of the business actually seems to be a better indicator of whether or not a business scores high as a local contributor. This differs from the situation seen in Finland where leakages were found to be of high importance (Rinne & Saastamoinen 2005).

Factors explaining variations in local value creation

The second research question was “*What affects local value creation among Norwegian NBT businesses?*” The regression model explained 11% ($SE = 39\%$) of the seen variation in local value creation, and it is significantly better at predicting variation in relative local value creation than by comparing means alone, $F(6,188) = 3.66, p < 0.002$.

The first sub-question of research question two was “*does motivation affect local value creation?*” The overall high scores and narrow distributions on the motivational variables indicate that respondents may not have put all their efforts into differentiating between them. The motivational factor “social contact with customers” was nonetheless included in the final regression model, where it had a positive effect on local value creation. When comparing the

standardized coefficients it was actually the variable that had the largest positive effect, thus motivation does affect local value creation, assumingly because being motivated by social contact with customers gives a positive effect on the visitor experience. Through such increased product quality, economic performance would be expected to improve through an increased number of visitors, the opportunity to increase charges, or both. Since social contact with customers must be considered a lifestyle entrepreneur-trait (Peters et al. 2009), this could indicate that in fact such entrepreneurs deliver high-quality products, which ultimately has a positive effect on the economic result. When looking at the average scores on motivational factors (table 1), providing good nature experiences to customers is by far the one with the highest score and the narrowest distribution, while maximizing profits has the lowest score. This fits well with the perception that nature-based tourism operators are lifestyle entrepreneurs. Overall, then, economically motivated entrepreneurs do not appear to be better local value creators than lifestyle entrepreneurs in this case.

Secondly, I asked “*does business size affect local value creation?*” Business size, measured in number of nature-based tourism related FTEs, was also included in the final regression model. Its impact was the largest of all the predictor variables, and it had a negative effect on local value creation. Thus larger businesses, although might resulting in a higher absolute value creation, on average had a lower degree of local value creation. Seen in light of theory this could be an effect both of lower economic performance and of higher leakages. When taking account for the “typical” business in the selection being very small (the most frequent score was 1.00 FTE), both can be interpreted in a meaningful way; Small businesses are more flexible than large ones (Storey & Greene 2010), so it is likely that these businesses can switch focus and use resources more effectively even if facing demand in certain seasons. Larger businesses could have larger difficulties with using available workforce effectively in the low-season; hence they are probably more likely to employ seasonal workers. For the same reason, larger businesses will be more likely to import workforce, resulting in income leakages and consequently lower local value creation.

The third question was “*does seasonality affect local value creation?*” The variable dependency on the season September-December was included in the regression model. It had a positive effect,

but it was the smallest of the six. With 75% of the respondents rating this season as being of no to moderate economic importance, this was by far the least economically important season. In comparison, 66% of the respondents said that the summer season (May-August) was of very high economic importance (see figure 3), supporting the general perception that most tourism activity in Norway happens during the summer. Thus it makes sense that the autumn season is the best indicator of seasonality, since businesses which are able to maintain activity in these months, most likely will be able to maintain activity also in the other seasons. All together the results indicate that businesses which are able to avoid seasonality are better local value creators.

Fourth, I asked “*does competence need affect local value creation?*” Of the 10 categories of competence, guiding/interpretation was the only one that was included in the regression model. Naturally, lack of competence in any form would be expected to have a negative effect on the economic performance of a business, and hence on local value creation. But the seen covariation between lack of competence within guiding/interpretation and local value creation also indicates that having an adequate amount of competence within guiding/interpretation has a significantly positive effect on the overall economic performance of NBT-businesses, hence also a positive effect on local value creation. Interestingly only 33% of businesses reported that they needed more competence in this category, and actually it was more common to need competence within both economy/marketing/sales (63%) and product development/creativity (50%) (See table 3). The latter categories were however not found to affect local value creation. This could indicate that guiding/interpretation in the NBT-industry represents what Krakover (2000) calls core competence. Since both economy/marketing/sales and product development/creativity can be considered to fall in under the second point mentioned by Wall and Mathieson (2006, p. 85), which stress that organization and marketing are important factors defining successful destinations, they should theoretically be of importance. The fact that they are lacking from the model could be a result of suppressor effects.

The next and fifth question was “*does geographic location affect local value creation?*” The geographic location variable was not included in the final regression model either, so although there are regional differences both with regards to available natural resources, economic complexity and distance to both domestic and foreign markets, this did not have any significant

effect on the local economic impact of the businesses. Drawing conclusions based on this is however debatable. First of all, indirect and induced impacts could not be taken account for, so larger differences would be expected to appear if these were included. Secondly, destinations within each region probably will have larger differences than the average difference between the regions.

The sixth question was “*do the activities offered affect local value creation?*” Two of the 11 categories of activities ended up in the final regression model. Food serving/production of local food had a positive effect, which may be another sign of the importance of maintaining year-round activity. By having this and tourism as supplementary economic activities, resources may be used more effectively. It could also be an effect of such businesses delivering a more complete tourism product which better meets the needs of customers (Kamfjord 2011). In a sense, such businesses represent a more complex economic system than businesses focusing on only one product, which possibly gives a lower leakage due to a lower propensity for importing foods (Paajanen 1994). Innovasjon Norge (2013, p. 35) found that tourists taking part in cultural activities have the highest daily expenses, while tourists taking part in nature activities had generally low daily expenses. However, they also found that nature and activities are extremely important for attracting customers, so all in all, the combination of culture- and nature-based tourism seems to be a winning recipe.

Transportation, which possibly could have the same qualities as other supplementary economic activities, shows a negative effect on local value creation. Since this was defined as transportation in a tourism context, it will not have the same buffer effect against seasonality as the food-related activities mentioned earlier. Rather, transportation represents a rather capital intensive industry, which when performed at a small scale may not pay off. Compared with other activities, transportation services are not necessarily very labor intensive. Expenses may therefore go to fuel etc., instead of resulting in value creation through salaries. Because of the need for importing fuel from outside the local community, transportation generally have high indirect leakages as well.

The seventh, and last, question was “*does business phase affect local value creation?*” The business phase variable did not appear in the final regression model. The reason for including this

variable in the regression analysis was to adjust for the expectation that businesses in very early and very late phases of the business life cycle would have a poorer economic performance than other businesses. Since an overwhelming majority of the businesses reported to be in a growth or mature/stable phase (table 2), it should come as no surprise that this did not end up as an important factor for deciding the degree of local value creation among the selection.

Too sum up, then, two of the variables found to affect local value creation - the motivational factor of social contact with customers, and the economic importance of transportation – seem to be mainly related to the overall economic performance, which as we have seen is of critical importance for the local value creation. The four others seem to be more related to direct leakages. Need for competence within guiding/interpretation and business size both had a negative effect, indicating an increased need to import workforce. Dependency on the autumn season and importance of food serving/ production of local food, on the other hand, had a positive effect, indicating that by being able to maintain year round activity leakages can be reduced, possibly through a reduced need to import workforce. In addition to affecting leakages, food serving/production of local food and guiding/interpretation do hold qualities that could improve the overall economic performance in the same way as the motivational factor social contact with customers.

Due to their importance in the literature, marketing and organization are two of the variables that could have been falsely ignored through suppressor effects during regression, while geographic location could have shown an effect if measured in a different way.

Conclusions

The average Norwegian nature-based tourism supplier was found to result in a local value creation of 39%, but the variation was large ($SD = 44\%$). The mean was rather highly affected by businesses with a negative economic performance. Direct leakages were generally low, so the overall economic performance was found to be of the largest importance for a business' local value creation.

Motivation, seasonality, competence need, business size and activities offered were all found to affect local value creation, while geographic location and business phase were more uncertain. The performed regression model included six variables and explained 11% ($SE=39\%$) of the seen variation in local value creation. Two of the predictor variables – the motivational factor of social contact with customers, and the economic importance of transportation – were found to be mainly related to the overall economic performance, while two others – dependency on the season September-December and business size – were found to be mostly related to leakages. The two last predictors - food serving/production of local food and guiding/interpretation – were found to be related to both the economic performance and leakages.

Implications

These results signal that within Norwegian nature-based tourism, leakages are not the main problem hindering regional development. Rather, the overall economic performance of businesses decides whether they contribute to development or not. There are no indications that economically motivated entrepreneurs perform better than lifestyle entrepreneurs, rather lifestyle entrepreneurs show the ability to create more high quality products. Therefore, measures aimed at developing regions through nature-based tourism ought to focus on developing solid businesses through promotion of year-round activity, either through fully nature-based tourism businesses alone or through businesses using a combination of different economic activities.

The seen impact of competence within guiding/interpretation gives reason to believe that promotion of such skills could yield a positive effect on the effect of Norwegian nature-based tourism operators as tools for regional development.

Although marketing was not incorporated in the regression model, improvement of the presently unstructured marketing will probably be fruitful, especially when we see that as much as 63% (table 3) of the businesses felt that a lack of competence within this category. Results also indicate that promoting better structured co-operations within marketing and development could be effective in order to achieve growth and professionalization in an industry dominated by lifestyle entrepreneurs. All in all, this corresponds very well to the main goals in the newest government tourism strategy (Nærings- og handelsdepartementet 2012).

Further research

By calculating local value creation in another way it could be possible to include variables on the nature of investments in the analysis. Especially distinguishing between local (internal) and non-local (external) investors would be interesting, since the aspect of growth from within the community has received quite some attention (for example Mehmetoglu 2007; Place 1991). Additionally, including indirect and induced impacts would give a better picture of the actual contribution of the industry, which could result in estimates of its contribution to the Norwegian economy.

Like concluded, it is reasonable to think that geographic location and marketing/organization does have an effect on the degree of local value creation even though my results did not show that. For further research these ought to be measured in a different way. Sorting municipalities into groups based on how rural they are and including the indirect and induced impacts could potentially give an improved regression model.

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Appendix

Appendix I. Pre-notice email

Appendix II. Email attached to questionnaire

Appendix III. Questionnaire

Appendix IV. Reminders

Appendix I

Pre-notice email

Landsdekkende undersøkelse: Søker kunnskap om naturbasert reiseliv

Til daglig leder av virksomheter som tilbyr aktiviteter eller opplevelser i naturen (naturbasert reiseliv).

Om 2-3 dager vil du få tilsendt en e-post med den første landsdekkende undersøkelsen om naturbasert reiseliv i Norge. Spørreundersøkelsen sendes 2100 naturbaserte reiselivsvirksomheter/bedrifter.

Naturbasert reiseliv står sentralt i Norges reiselivsstrategi, men vi mangler kunnskap og statistikk som kan sikre gode rammevilkår for tilbydere i denne bransjen. Derfor kontakter vi ved Universitetet for miljø- og biovitenskap (UMB) på Ås nettopp dere som har erfaring og meninger om dette. Det er mange små og deltidsaktører i det naturbaserte reiselivet og svar fra disse er viktige for at undersøkelsen skal gi et riktig bilde av bransjen.

Vi håper du ønsker å få fram mer kunnskap om bransjen, og deltar i undersøkelsen når den kommer. Ditt bidrag er viktig og verdifullt for næringa, bedriftene og forskning om naturbasert reiseliv.

På forhånd takk for hjelpen!

Med vennlig hilsen

Stian Stensland (stian.stensland@umb.no)

Knut Fossgard (knut.fossgard@umb.no, 6496 5735 / 918 41799)

UNIVERSITETET FOR MILJØ- OG BIOVITENSKAP, ÅS

PS! Har du spørsmål til undersøkelsen kan du kontakte Knut Fossgard eller Stian Stensland. Mer informasjon får du også når du mottar undersøkelsen.

Appendix II

Email attached to questionnaire

Landsdekkende undersøkelse: Søker kunnskap om naturbasert reiseliv

Til daglig leder av virksomheter som mot betaling tilbyr aktiviteter eller opplevelser i naturen (naturbasert reiseliv). Denne første landsdekkende undersøkelsen om naturbasert reiseliv sendes til 2100 virksomheter/bedrifter og åpnes ved å klikke på denne linken:

[LINK]

MÅLGRUPPE FOR UNDERSØKELSEN OG NYTTE FOR NÆRINGA

Naturbasert reiseliv står sentralt i Norges reiselivsstrategi, men i det mangler grunnleggende kunnskap og statistikk om disse tilbyderne av opplevelser og aktiviteter i naturen. Mange av bedriftene er små og sesongbaserte, og svar fra nettopp disse virksomhetene er viktig for at undersøkelsen skal gi et riktig bilde av næringa.

Gjennom undersøkelsen ønsker vi din hjelp til å få mer informasjon om:

- hvor i Norge virksomhetene/tilbyderne i det naturbaserte reiselivet finnes;
- hva slags aktiviteter det er som tilbys;
- hva som er målsetningene for virksomhetene;
- virksomhetenes kompetanse;
- suksessfaktorer og flaskehalser;
- det naturbaserte reiselivets økonomiske betydning;
- virksomhetenes syn på bruk og vern av natur.

Slik informasjon er nødvendig for å avdekke betydningen og omfanget av næringa, næringsaktørenes syn på sentrale spørsmål, og dermed for videreutvikling av det naturbaserte reiselivet. Resultatene fra undersøkelsen i dette felles nordiske forskningsprosjektet sendes deltakerne. Deltakelse gir deg dermed mer informasjon om egen næring.

UTFYLLING AV SKJEMAET OG SVARPREMIER

Skjemaet fylles ut av den person som har ansvaret for den daglige driften av bedriften/virksomheten. Spørsmålet i skjemaet gjelder for sesongen 2012 dersom ikke annet er oppgitt.

Utfyllingen kan føles tidkrevende (det tar ca 20-30 minutter). Vi håper du tar deg tid til å fylle ut skjemaet så grundig som mulig og etter beste evne. Blant dem som svarer trekker vi ut følgende premier:

- 2 stk. årsmedlemskap og profilering av din bedrift gjennom HANEN -bransje og markedsorganisasjonen for bygdeturismen (se www.hanen.no);
- flere bøker om reiselivsutvikling og nytt fra reiselivsforskninga.

DATALAGRING OG ANONYMITET

UMB står for innsamling, behandling og lagring av data. Svarene behandles anonymt slik at ingen får vite hva akkurat du har svart. Svar fra enkeltpersoner er konfidensielle og vil ikke kunne gjenkjennes i rapporter og publikasjoner. Data lagres på en betryggende måte i påvente av en oppfølgende undersøkelse om noen år, og anonymiseres 31.12.2017.

Dine erfaringer med og oppfatninger om naturbasert reiseliv er svært viktige bidrag for videre kunnskapsutvikling og næringsutvikling. På forhånd takk for hjelpen!

Med vennlig hilsen,

Stian Stensland

Universitetet for miljø- og biovitenskap, Ås

Har du spørsmål om undersøkelsen, ta kontakt med Stian Stensland

(stian.stensland@umb.no) eller Knut Fossgard (knut.fossgard@umb.no, tlf 6496 5735 / 918 41799). Mer om forskningsprosjektet og denne undersøkelsen:

<http://www.umb.no/ina/artikkel/ny-kunnskap-om-naturbasert-reiseliv>

Appendix III

Questionnaire



Landsdekkende undersøkelse: Søker kunnskap om naturbasert reiseliv
UNIVERSITETET FOR MILJØ- OG BIOVITENSKAP
INSTITUTT FOR NATURFORVALTNING
WWW.UMB.NO/INA

Mer om forskningsprosjektet og denne undersøkelsen:
<http://www.umb.no/na/artikkel/ny-kunnskap-om-naturbasert-reiseliv>

1) Hva slag betydning har følgende næringsaktiviteter for virksomhetens totalomsætning?
Gi et anslag.

	Ingen betydning = 1	2	3	4	5	6	Svært viktig = 7	Vet ikke
Betalte guidede aktiviteter i naturen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Selv-guidede aktiviteter (utleie av utstyr, båt, fiske/jakutleie, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Salg av friluftststyr	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Produksjon/organisering av arrangementer/festivaler i natur	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overnatting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transport (reiselivsformål)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Servering/lokalmatproduksjon	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Turoperatørvirksomhet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Informasjonsformidling (f.eks. turistkontor, besøkscenter)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Jord-/skogbruk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Fiskeri/næringsfiske

☐

Annen viktig næringsvirksomhet:

2) Spesielt om jakt og fiske. Tilbyr din virksomhet noen av følgende produkter tilknyttet jakt- eller fiskeopplevelser?

Sett kryss for alle de kategoriene dere tilbyr. Hopp over spørsmålet om dere ikke tilbyr noen av produktene under.

	Kortsalg/utleie av jakt/fiske båt/utstyr	Guiding	Overnatting
Fiske etter laks, sjøørret, sjørøye	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Innlandsfiske	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sjøfiske	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Småviltjakt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Storviltjakt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jakt i sjøen (fugl, sel)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3) Hvilke aktiviteter innen naturbasert reiseliv tilbyr din virksomhet?

Med aktiviteter menes hva som din virksomhet organiserer på andres eller egne vegne og som du selger til egne kunder. *Betalte guidede aktiviteter er når en person er med gjestene på aktiviteten.*

Utleie av utstyr: f.eks. båter, sykler, fotokjøl og annet utstyr mot betaling.

Med tilrettelegging menes det å tilby informasjon og opplegg for selvguiding, m.m. Kunden kan betale direkte for dette eller det kan være gratis/innbakt i totalpakke.

Sett kryss for alle de aktivitetene/kategoriene dere tilbyr.

	Betalte guidede aktiviteter	Utleie av utstyr	Tilrette- legging
Vandring/fotturer/toppturer (ikke klatring)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sykling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Turridning med hest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Langrenn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trugeturer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ski- og snowboard (toppturer, løssnøkjøring/frikjøring)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ekspedisjoner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Båtsightseeing, fjordcruiser, havratting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Snøskuterturer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Luftbaserte aktiviteter (f.eks. fallskjerm, paragliding.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

hangliding

Actionsport/White water i/på ferskvann (f.eks. rafting, elvekajakk, surfing, kiting)

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Andre aktiviteter i/på ferskvann (f.eks. kano, kajakk, robåt)

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Actionsport i/på saltvann (f.eks. kiting, surfing)

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Andre aktiviteter i/på saltvann (f.eks. kajakk, seiling, kano)

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Aktiviteter under vann (f.eks. dykking og snorkling)

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Klatring, isklatring, tinderangling

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☐

Brevandring

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☐

Hundekjøring

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☐

☐

Kiting (snø og/eller vann)

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☐

☐

Fugleklikking

☐

☐

☐

Viltsafari på land (f.eks. elgsafari)

☐

☐

☐

Viltsafari på vann (f.eks. hvalsafari)

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Naturfotografering (f.eks. landskap, dyr, planter, nordlys)

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Naturstudier (f.eks. kurs eller formidling om planter, dyr, geologi, etc.)

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Overnatting knyttet direkte til naturopplevelsen (f.eks. tretopphytter, villmarkscamp, igloer, etc.)

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Andre naturbaserte aktiviteter og opplevelser som tilbys (spesifiser):

Del 1: Virksomhetens tilbud av naturbasert reiseliv
Når vi videre i spørreundersøkelsen benytter begrepet "virksomheten" menes det (om ikke annet er oppgitt) virksomhetens aktivitet innen *naturbasert reiseliv* - dvs. det som mot betaling tilbys av opplevelser og aktiviteter i naturen.

4) Når startet virksomheten med naturbasert reiseliv?

Velg alternativ

2013

5) Mange virksomheter har naturbasert reiseliv som kun en del av sin totale inntektsportefølje. Om du tar med all slags næringsvirksomhet som virksomheter driver: Omtrent hvor stor andel av virksomhetens totalomsetning kommer fra naturbasert reiseliv?
Gi et anslag i prosent.

6) Nevn de tre naturbaserte reiselivsaktivitetene som økonomisk sett betyr mest for virksomheten.
La B stå tomt hvis du kun tilbyr 1 aktivitet.

La C stå tomt hvis du kun tilbyr 2 aktiviteter.

- A. Viktigst
- (rullegardin med samme liste som brukt under spørsmål 3)
- B. Nest viktigst
- C. Tredje viktigst

7) Aktiviteten gjennom året 2012. Hvilken betydning hadde følgende perioder for virksomhetens omsetning av naturbaserte reiselivsaktiviteter?

	Ingen betydning = 1	2	3	4	5	6	Svært stor betydning = 7	Vet ikke
Januar-april	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mai-august	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
September-desember	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8) Angir om etterspørselen etter virksomhetens produkter/tjenester er "for liten", "passe", eller "for stor" for hver sesong i forhold til dagens bemanning.

	Ingen betydning = 1	for liten	passe	for stor	Vet ikke
Januar-april	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mai-august	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
September-desember	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Del 2: Bruk av landområder, nasjonalparker og andre verneområder

9) Hvilken betydning har følgende eiendomstyper for virksomhetens omsetning av naturbaserte reiselivsaktiviteter?

	Ingen betydning = 1	2	3	4	5	6	svært viktig = 7	Vet ikke
Egen utmarkselendom	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Annen privat eiendom (eneeie, sameie, allmenning)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finnmarkselendommen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Statskog	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Statsallmenning i Sør-Norge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ingen som eier (eks. i havet)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Annen viktig eiendomstype:

10) Ferdseil og enkel overnatting på andres grunn er i henhold til Friluftsløven (allemannsretten) i utgangspunkt åpent for alle innen visse grenser. I hvilken grad vil du si deg enig i følgende utsagn?

	Svært uenig = 1	2	3	4	5	6	7	Svært enig = 7	Vet ikke
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"Allemannsretten er en viktig rett som bør opprettholdes"

Hvis du ønsker å begrunne din mening, kan du gjøre det her:

11) Hvor langt er det fra dere opererer til den nærmeste nasjonalparken? I antall kilometer.

12) I hvilken grad foregår virksomhetens naturbaserte reiselivsaktiviteter inne i eller i randsonen (inntil 5 km) til en nasjonalpark eller annet verneområde?

NB! Verna vassdrag eller nasjonale lakseelver/-fjorder regnes ikke som verneområder her.

	Ikke i det hele tatt = 1	2	3	4	5	6	7	Svært stor grad = 7	Vet ikke
I nasjonalpark	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I randsonen (inntil 5 km) til en nasjonalpark	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I et landskapsvernområde	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I et naturreservat/annet verneområde	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

13) Velg antall nasjonalparker som din virksomhet opererer i eller i randsonen til:

14) I hvilke nasjonalparker (inkludert randsonen) opererer din virksomhet mest?

Velg de 3 nasjonalparkene som din virksomhet opererer mest i.

La B stå tomt hvis din virksomhet opererer i 1 nasjonalpark.

La C stå tomt hvis din virksomhet opererer i 2 nasjonalparker.

- A. Mest brukte nasjonalpark
B. Nest mest brukte nasjonalpark
C. Tredje mest brukte nasjonalpark

15) I hvilken grad brukes områdets status som nasjonalpark i markedsføringen av virksomheten?

<input type="radio"/>	Brukes ikke = 1
<input type="radio"/>	2
<input type="radio"/>	3

<input type="radio"/>	4
<input type="radio"/>	5
<input type="radio"/>	6
<input type="radio"/>	I svært stor grad = 7
<input type="radio"/>	Vet ikke

16) Hva slags betydning har nasjonalparkstatusen for at virksomheten skal kunne drive med naturbasert reiseliv?

Med «nasjonalparkstatus» mener vi ikke regler og vernebestemmelser, men at området er en nasjonalpark.

<input type="radio"/>	svært negativ betydning = -3
<input type="radio"/>	-2
<input type="radio"/>	-1
<input type="radio"/>	nøytral = 0
<input type="radio"/>	1
<input type="radio"/>	2
<input type="radio"/>	svært positiv betydning = 3
<input type="radio"/>	Vet ikke

17) Hvilken betydning mener du at den eller de nasjonalparkene som din bedrift opererer i (eller i randsonen til) har for områdets...

	svært negativ betydning = -3	-2	-1	0	1	2	svært positiv betydning = 3	Vet ikke
...attraktivitet for turister?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...generelle turismeutvikling?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...tilgjengelighet (veier, plasser, transporttilbud)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...turistmessige tilrettelegging for øvrig (skilter, stier, informasjonsskiltak)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...turistmessige infrastruktur for øvrig (overnatgingstilbud, serveringssteder og annen service)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

18) Hva slags påvirkning har nasjonalparkens vernebestemmelser (verneforskrifter, forvaltningsplan mv) for utviklingen av din virksomhet?

- ☐ svært negativ påvirkning = -3
- ☐ -2
- ☐ -1
- ☐ ingen påvirkning = 0
- ☐ 1
- ☐ 2
- ☐ svært positiv påvirkning = 3
- ☐ Vet ikke
- ☐ Ikke aktuelt

Kan du kort beskrive hva denne påvirkningen består av?

19) Når du vurderer utviklingen over tid, synes du at verneområdeforvaltningen der du opererer har vært mindre eller mer imøtekommende overfor reiselivsbedriftene...

-3 = *mye mindre imøtekommende*, 0 = *ingen endring*, +3 = *mye mer imøtekommende*

	-3	-2	-1	0	1	2	3	Vet ikke	Uaktuelt
...i perioden 2003--2009 sammenlignet med årene før dette?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
...de siste 3 år sammenlignet med 2003-2009?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

20) Hvilken betydning har innføringen av lokal forvaltningsmodell (med bl.a. interkommunale nasjonalparkstyrrer) hatt for samarbeidet mellom reiselivsinteressene og forvaltningsmyndighetene i den eller de nasjonalparkene der din virksomhet opererer?

- ☐ svært negativ betydning = -3
- ☐ -2
- ☐ -1
- ☐ ingen endring = 0
- ☐ 1
- ☐ 2
- ☐ svært positiv betydning = 3
- ☐ Vet ikke
- ☐ Uaktuelt

21) I hvilken grad synes du at forvaltningen legger til rette for at reiselivsutvikling kan skje i og omkring nasjonalparker der din virksomhet opererer?

- ☐ i svært liten grad = 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6
- ☐ i svært stor grad = 7
- ☐ Vet ikke
- ☐ Uaktuelt

22) Hvordan vil du beskrive samarbeidet mellom reiselivsbedriftene og nasjonalparkforvaltningen der din virksomhet opererer?

- ☐ svært dårlig = -3
- ☐ -2
- ☐ -1
- ☐ verken/eller = 0
- ☐ 1
- ☐ 2
- ☐ svært godt = 3
- ☐ Vet ikke
- ☐ Uaktuelt

NB: Hvis du tidligere svarte at din virksomhet ikke opererer i nasjonalpark eller andre verneområder, har du fått lov til å hoppe over noen spørsmål.

23) Hvilken betydning vil du generelt sett si at nasjonalparkene har for turismeutviklingen i Norge?

- ☐ svært negativ betydning = -3
- ☐ -2
- ☐ -1
- ☐ hverken eller = 0

- ☐ 1
☐ 2
☐ svært positiv betydning = 3
☐ Vet ikke

24) Hvordan påvirker følgende areal- og naturbruk din virksomhets drift innen naturbasert reiseliv?

	svært negativt = -3	-2	-1	ingen påvirkning = 0	+1	+2	svært positivt = +3	Angår ikke min bedrift	Vet ikke
Skogsblveier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Skogsbrukets hogst	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kraftmaster	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vannkraftutbygging	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gruedrift, steinbrudd	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vindmøller	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hytteområder	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reindrift	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Del 3: Organisering og stedstilhørighet

25) Hvordan er virksomhetens drift organisert idag?

Sett ett kryss

- ☐ Enkeltmannsforetak
☐ Begrenset ansvar (BA)
☐ Aksjeselskap (AS)
☐ Ansvarlig selskap, solidarisk ansvar (ANS)
☐ Ansvarlig selskap, delt ansvar (DS)
☐ Annet, skriv hva

26) Er virksomheten en familiebedrift?

- ☐ Ja
☐ Nei

27) I hvilken kommune er din virksomhet registrert?

Med "registrert" menes hvor virksomheten skatter.

Opererer virksomheten din i andre kommuner enn der den er registrert?

Med "opererer" menes hvor selve reiselivsaktiviteten foregår.

- ☐ Ja
☐ Nei

28) I hvilke(n) kommune(r) opererer din virksomhet mest?

Med "opererer" menes hvor selve reiselivsaktiviteten foregår.

A. Vi opererer mest i _____ kommune:

La B stå tomt hvis du kun opererer i 1 kommune.

La C stå tomt hvis du kun opererer i 2 kommuner.

B. Vi opererer nest mest i _____ kommune:

C. Vi opererer tredje mest i _____ kommune:

Hvis virksomheten også opererer i utlandet, skriv ned hvilke:

29) I hvilke av følgende bransjeorganisasjoner er virksomheten medlem?

Flere kryss er mulig

- ☐ Din Tur
☐ HANEN
☐ Hovedorganisasjonen Virke
☐ NHO Reiseliv
☐ Norges Bondelag
☐ Norges Skogelerforbund
☐ Norsk Bonde- og Småbrukarlag
☐ NORSKOG
☐ Norsk kulturarv
☐ Norsk seterkultur
☐ Norsk økoturisme
☐ NORTIND - Norske Tindevegledere
☐ Destinasjonsselskap
☐ Annet lokalt næringselskap
☐ Andre organisasjoner. Skriv hvilke:

Del 4: Status, mål og nytenkning

30) Hvilken av følgende faser synes du best beskriver virksomhetens arbeid med naturbasert reiseliv?

Sett ett kryss

- ☐ I oppstartsfasen
- ☐ Vekstfase
- ☐ Moden/stabil fase
- ☐ Nedtrappingsfase
- ☐ Avviklingsfase
- ☐ Vet ikke

31) Hvor høyt eller lavt prioriterer virksomheten følgende målsettinger i sitt arbeid med naturbasert reiseliv?

	Svært lavt prioritert = 1			2	3	4	5	6	Svært høyt prioritert = 7	Vet ikke
Størst mulig inntekt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sikker og stabil inntekt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Selvstendighet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interessant jobb	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kunne bo der vi bor idag	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kunne arbeide ute i naturen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Utnytte lokale naturressurser til næring	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sosial kontakt med kunder	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gi kundene en god naturopplevelse	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Formidle holdninger om naturverdier til kundene	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bidra til bærekraftig reiselivsutvikling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Om det er mål som er viktige for virksomheten, men ikke listet opp, så kan du skrive de inn her:

Del 5: Kompetanse og suksessfaktorer i arbeidet med det naturbaserte reiselivet

32) For å nå virksomhetens mål innen naturbasert reiseliv, hvilken betydning har det å ha tilgang på ekstern kompetanse på følgende områder?

Ekstern kompetanse kan være noe man betaler for eller får gratis gjennom eksempelvis Innovasjon

Norge, kommune/fylke/stat, reiselivsnettverk/andre bedrifter, turoperatører, destinasjonsselskaper, næringsorganisasjoner, konsultantselskaper, forskningsmiljøer etc. Bruk eventuelt "annet"-feltet under til å spesifisere/kommentere.

	Ingen betydning = 1			2	3	4	5	6	Svært viktig = 7	Vet ikke
Ledelse, organisering	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Økonomi, markedsføring, salg	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Servering, overnatting, transport	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Produktutvikling, kreativitet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Guiding, formidling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Naturforvaltning, naturkunnskap	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Jus, arealplanlegging	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Klima, bærekraft	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Samfunn, politikk, kultur	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Språk (utover norsk)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Annen viktig kompetanse som ikke er listet opp:

33) Har virksomheten behov for mer kompetanse på noen av følgende områder i sitt arbeid med naturbasert reiseliv? Det er mulig å sette flere kryss.

- ☐ Ledelse, organisering
- ☐ Økonomi, markedsføring, salg
- ☐ Servering, overnatting, transport
- ☐ Produktutvikling, kreativitet
- ☐ Guiding, formidling
- ☐ Naturforvaltning, naturkunnskap
- ☐ Jus, arealplanlegging
- ☐ Klima, bærekraft
- ☐ Samfunn, politikk, kultur
- ☐ Språk (utover norsk)

Eventuelt annen kompetanse som du savner:

34) I hvilken grad har følgende faktorer betydning for å nå virksomhetens mål innen naturbasert reiseliv?

	ingen betydning = 1				avgjørende betydning = 5			
Lederskap (engasjement, kompetanse)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nettverk (sertifisering, samarbeid, bransjeforeninger)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ekstern støtte (økonomiske subsidier, forbilder/inspiratorer)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Livsstil (interesse for friluftsliv, familiens engasjement)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finansieringssituasjon (muligheter for å gjøre større investeringer)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fri tilkomst og fri ferdsel i naturområder (allmennsretten, strandsone-loven)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Erfaring (personalets utdanning/kompetanse/tidligere erfaring)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lokal tilknytning (lokal forankring, tilgang til anlegg)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Naturressurser (tilgang/enerett til naturressurser)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Eventuelle andre viktige faktorer:

35) I hvilken grad kan følgende faktorer virke inn som hindringer for å nå virksomhetens mål innenfor naturbasert reiseliv?

	ingen betydning = 1				avgjørende betydning = 5			
Eksterne restriksjoner (lover, reguleringer, myndighetsutøvelse, grunneiere)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Personale (rekruttering, utdanning, kompetanse)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kapital og kunnskap (dårlig lønnsomhet, mangel på kapital, kunnskapsmangel)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fri tilkomst og fri ferdsel i naturområder (allmennsretten, strandsone-loven)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manglende destinasjonsmarkedsføring	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manglende tilgang til naturressurser	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lokalisering (manglende infrastruktur, geografisk plassering)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Eventuelle andre viktige faktorer:

Del 6: Miljøsertifisering

36) Er virksomheten miljøsertifisert?

For eksempel gjennom Norsk Økoturisme, Miljøfyrtårn, ISO14001, Bliitt Flagg.

- ☐ Sertifisering pågår/er sertifisert
- ☐ Nei
- ☐ Vet ikke

37) Hva slags påvirkning tror du en eventuell eller eksisterende miljøsertifisering av deres naturbaserte reiselivsvirksomhet vil ha, når det gjelder å bidra til:

	svært negativ påvirkning = -3				svært positiv påvirkning = 3			
Å øke kundemassen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Økt lønnsomhet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Å nå en annen type kunder	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Godt omdømme ("goodwill")	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Motivasjon og engasjement hos de ansatte	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Eventuelle andre viktige faktorer:

Del 7: Økonomi

For å kunne få fram viktig statistikk om omfanget av naturbasert reiseliv i Norge trenger vi å vite noen økonomiske tall for bedriftene. Vi minner om at dine svar er til stor hjelp for oss. Hva du svarer på vegne av din virksomhet forblir anonymt da vi bare oppgir tall fra større grupper av bedrifter uten å nevngi dem.

38) Vi ønsker gjerne så presise tall som mulig fordi kunnskap om naturbaserte reiselivsbedriftene er sårt tiltrengt. Om du har virksomhetens regnskap eller ligningstall tilgjengelig for 2011 eller 2012 så vennligst ta fram dem. Om du ikke har disse tilgjengelig så svar så godt du kan. Vi ber deg svare for det året du har mest nøyaktig oversikt for.

- ☐ Jeg har mest nøyaktige tall for 2011
- ☐ Jeg har mest nøyaktige tall for 2012

A: Samlet næringsvirksomhet

39) Mange virksomheter har naturbasert reiseliv som kun en del av sin totale inntektsportefølje. Om du tar med all slags næringsaktivitet som virksomheten driver, omtrent hvor stor var totalomsetningen i 2011?

Skriv beløpet i feltet under. Du kan runde av svaret om det er enklere. Skriv "x" hvis du absolutt ikke ønsker å oppgi omsetningstall.

40) Totalt sett for alle næringsaktiviteter, omtrent hvor mange personer og årsverk inkludert deg selv var ansatt i virksomheten i 2011?
Rund av om du ikke har det nøyaktige tallet.

- A. Antall personer:
B. Antall årsverk:

B. Naturbasert reiseliv

41) For året 2011, omtrent hvordan fordeles virksomhetens årsverk knyttet til naturbasert reiseliv seg på henholdsvis:
Fyll ut 0 om ingen i gitte kategori. Gi et anslag. Gjerne bruk tidelsårsverk om nødvendig.

- A. Heltidsansatte (antall årsverk):
B. Deltidsansatte gjennom hele året (antall årsverk):
C. Sesongarbeidere (antall årsverk):

42) For året 2011, hvordan fordeles virksomhetens årsverk knyttet til naturbasert reiseliv seg på gruppene under.
Fyll ut 0 om ingen i gitte kategori. Gi et anslag. Gjerne bruk tidelsårsverk om nødvendig.

- A. Lokalt bosatte; folker registert i kommunen(e) der aktivitetene foregår (antall årsverk):
B. Utenbygds ansatte; folker registert i annen norsk kommune (antall årsverk):
C. Utenlandske ansatte; folker registert i utlandet (antall årsverk):

43) Omtrent hvor store kostnader knyttet til naturbasert reiseliv hadde din virksomhet i 2011?
Kostnader inkluderer eksempelvis: lønnskostnader, vareinnkjøp, strøm, vedlikehold, innkjøp av tjenester, avskrivning på investeringer etc. Gi et anslag og skriv beløpet. Skriv X om du absolutt ikke vil oppgi dette.

- ☐ 0 / ingen
☐ Antall kroner:

44) For 2011, omtrent hvor stor andel av virksomhetens kostnader knyttet til naturbasert reiseliv, utgjorde brutto lønnskostnader (inkl. sosiale utgifter, arbeidsgiveravgift)?
I prosent.

45) Omtrent hvor stor andel av omsetningen innen naturbaserte reiselivstod de ulike kundegruppene for i 2011?
I prosent. Summeres til 100%.

	0	10	20	30	40	50	60	70	80	90	100
Kurs og konferansemarkedet ("bedriftsmarkedet")	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ferie og fritidsmarkedet ("privatmarkedet")	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

46) Omtrent hvor stor andel av omsetningen innen naturbasert reiseliv utgjorde kunder fra følgende regioner i 2011?
Sett 0 om du ikke har kunder fra den regionen. I prosent. Summeres til 100%.

	0	10	20	30	40	50	60	70	80	90	100
Kunder fra en radius av 100 km fra der dere opererer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Øvrige norske kunder	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Utenlandske kunder	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Nevn 2 viktigste land (unntatt Norge):

47) Om man ser på lønnsomheten ved lik innsats av penger og andre ressurser, er den naturbaserte reiselivsaktiviteten mer eller mindre lønnsom enn annen næringsaktivitet virksomheten driver?

- ☐ Mye mindre lønnsom = 1
☐ 2
☐ 3
☐ Lik lønnsom = 4
☐ 5
☐ 6
☐ Mye mer lønnsom = 7
☐ Vi driver kun med naturbasert reiseliv
☐ Vet ikke

Du kan skrive eventuelle kommentarer til ditt svar her:

48) Når det gjelder naturbasert reiseliv, hvordan er dagens situasjon for virksomheten sammenlignet med for 3 år siden når det gjelder:

	mye lavere = 1	2	3	4	5	6	7	mye høyere = 7	Vet ikke
Lønnsomhet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Omsetning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

49) Når det gjelder naturbasert reiseliv, hvordan tror du virksomhetens omsetning er om 3 år sammenlignet med i dag?

- ☐ mye lavere = 1
☐ 2
☐ 3
☐ uforandret = 4

☐ 5

☐ 6

☐ mye høyere = 7

☐ Vet ikke

Del 8: Om eier/daglig leder

50) Jeg som fyller ut spørreskjemaet er:

Sett ett eller flere kryss.

☐ Daglig leder for virksomheten

☐ Eier av virksomheten

☐ Annen ansatt i virksomheten

☐ Annet, skriv hva i

51) Hvor mange år har du vært i virksomheten?

Skriv ned antall år (i bare tall):

52) Hvor stor stilling har du i virksomheten?

Oppgi i % av et fullt årsverk.

53) Omtrent hvor stor andel av din totalinntekt gjør det du tjener/får fra virksomheten?

I prosent.

54) Hvor mange års erfaring har du med arbeid innenfor naturbasert reiseliv?

Skriv ned antall år i tall. For eksempel: 10

55) Hvilket år er du født?

Skriv årstall i fire siffer. For eksempel: 1975

56) Er du mann eller kvinne?

☐ Mann

☐ Kvinne

57) Hva er lengste utdanning for deg?

Sett ett kryss.

☐ Grunnskole

☐ Videregående skole (inkl. landbrukskole)

☐ 1-3 år på høgskole/universitet

☐ Mer enn 3 år på høgskole/universitet

58) Er det noe annet du vil fortelle oss om virksomheten, undersøkelsen, deg selv eller naturbasert reiseliv i Norge, kan du skrive det her.

Tusen takk for hjelpen! Ditt bidrag er viktig for oss og næringen!

Har du spørsmål om undersøkelsen, ta kontakt med
Stian Stensland (stian.stensland@umb.no) eller
Knut Fossgard (knut.fossgard@umb.no, tlf 6496 5735 / 918 41799).

Mer om forskningsprosjektet og denne undersøkelsen:
<http://www.umb.no/ina/artikkel/ny-kunnskap-om-naturbasert-reiseliv>

Appendix IV

Reminders

First reminder, SMS

Hei. Sist torsdag kveld fikk virksomheten din en spørreundersøkelse om naturbasert reiseliv. Om du allerede har svart, takker vi så mye! Hvis ikke, vennligst sjekk epost og fyll ut skjema i dag. Ditt svar er viktig for utviklinga av næringa. Takk for hjelpa! Mvh, Knut Fossgard, Universitetet i Ås

Second reminder, e-mail

Påminnelse - Undersøkelse om naturbasert reiseliv

Til daglig leder av virksomheter som helt eller delvis driver innenfor naturbasert reiseliv.

Forrige uke sendte vi deg en spørreundersøkelse der vi bad om dine meninger og erfaringer med å drive en virksomhet innen naturbasert reiseliv. Vi savner svar fra deg og håper du har anledning til å fylle ut undersøkelsen ved å klikke på linken. Om du allerede har startet på undersøkelsen, men ikke fullført den, kan du bare klikke på linken og fortsette der du slapp. Link for å starte undersøkelsen:

[LINK]

Uansett størrelse på virksomheten, er hvert eneste svar viktig. For at resultatene skal gi et riktig bilde av hva dere i næringa mener og driver med, er vi avhengige av svar fra både heltids- og deltidsaktører, store som små. Uten ditt bidrag, kan konklusjonene bli feil.

Resultatene fra undersøkelsen sendes alle som deltar, og det er også svarpremier å vinne.

For ordens skyld: Dine svar fra undersøkelsen er konfidensielle og bedriften forblir anonym.

Skulle det være slik at din virksomhet ikke tilbyr noe som helst av aktiviteter eller opplevelser i naturen, ta kontakt med oss slik at vi får korrigert vårt bedriftsregister.

Takk for at du gjennomfører undersøkelsen. Ditt bidrag er viktig!

Med vennlig hilsen,

Stian Stensland (stian.stensland@umb.no)
Knut Fossgard (knut.fossgard@umb.no) . tlf 918 41799

Universitetet for miljø- og biovitenskap, Ås

PS! Mer om undersøkelsen og forskningsprosjektet «Naturbasert reiseliv» kan du lese her: <http://www.umb.no/ina/artikkel/ny-kunnskap-om-naturbasert-reiseliv>

Third reminder, SMS

Hei. Sist torsdag sendte vi ut en påminnelse ang spørreundersøkelsen om naturbasert reiseliv. Mange har svart, men vi trenger flere for få et riktig bilde av bransjen. Om du ennå ikke har svart, håper vi du vil bidra. Det er bare å følge linken i e-posten fra torsdag. Og har du startet, kan du enkelt fortsette ved å følge den samme linken. Ditt svar er viktig! På forhånd takk. Mvh, Knut Fossgard, Universitetet i Ås

Fourth reminder, e-mail

Vi savner svar fra deg. Undersøkelse om naturbasert reiseliv

Til daglig leder av virksomheter som helt eller delvis driver innenfor naturbasert reiseliv.

Vi har de siste ukene sendt deg e-post og sms om vår landsomfattende undersøkelse. Det har kommet inn mange svar, og vi har fått gode tilbakemeldinger om at dette er en nyttig undersøkelse som vil komme næringa til gode. Som en av respondentene sier:

"Kunsten i denne bransjen er ikke å finne på turer, men å finne kunder som vil være med på tur og betale penger for det. Jeg er veldig nysgjerrig på hvor mange bedrifter som lever av naturbaserte aktiviteter, 100 %, hele året og tjener penger. Jeg håper undersøkelsen kan gi noen svar på hvem som lykkes og hvorfor de lykkes. - Didrick Ose, Did Adventure, Molde"

Men vi savner fortsatt svar fra deg og håper du vil bruke denne anledningen til å fortelle om hva som er viktig for deg og din virksomhet. Resultatene fra undersøkelsen sendes alle som deltar, og det er også svarpremier å vinne.

Klikk på linken under for å starte på undersøkelsen. Om du allerede har startet på undersøkelsen, men ikke fullført den, kan du bare klikke på linken og fortsette der du slapp. Skulle det være slik at din virksomhet ikke tilbyr noe som helst av aktiviteter eller opplevelser i naturen, ta kontakt med oss slik at vi får korrigert vårt bedriftsregister.

[LINK]

Det naturbaserte reiselivet er en mangfoldig næring både i størrelse og tilbud. Derfor er det viktig at flest mulig deltar, uansett om virksomheten er stor eller liten, heltids- eller deltidsnæring.

For ordens skyld: Dine svar fra undersøkelsen er konfidensielle og bedriften forblir anonym.

Takk for at du gjennomfører undersøkelsen. Ditt bidrag er viktig!

Med vennlig hilsen,

Stian Stensland (stian.stensland@umb.no)
Knut Fossgard (knut.fossgard@umb.no. tlf 918 41799)
Universitetet for miljø- og biovitenskap, Ås

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Fifth reminder, e-mail

Naturbasert reiseliv - Ennå plass til flere svar

Til daglig leder av virksomheter som helt eller delvis driver innenfor naturbasert reiseliv.

La oss først takke for din tålmodighet i forhold til vår undersøkelse om naturbasert reiseliv. Vi har fått mange positive tilbakemeldinger om at undersøkelsen vil bidra med etterlengtet kunnskap om en tildels ukjent bransje. For å få et korrekt bilde av bransjen som helhet, trenger vi dog flere svar enn vi har per nå. Vi håper du kan bidra til dette.

Samtidig har vi forståelse for deg som ikke ønsker å være med på undersøkelsen, men da håper vi du gir oss beskjed om dette slik at vi kan slette deg fra lista.

Derfor setter vi pris på om du kan velge ETT av følgende alternativer:

- A) Du ønsker å svare på undersøkelsen: Følg linken under - har du allerede startet, fortsetter den der du slapp.
- B) Du driver ikke med naturbasert reiseliv: Send ordet UTENFOR som svar på denne e-posten.
- C) Du har lagt ned virksomheten: Send ordene LAGT NED som svar på denne e-posten.
- D) Du vil ikke være med på undersøkelsen: Send ordene IKKE MED som svar på denne e-posten.
- E) Du har allerede svart: Send ordene HAR SVART som svar på denne e-posten.
- F) Annet: Send oss dine kommentarer/spørsmål som svar på denne e-posten.

[LINK]

Med vennlig hilsen,

Stian Stensland (stian.stensland@umb.no)
Knut Fossgard (knut.fossgard@umb.no. tlf 918 41799)
Universitetet for miljø- og biovitenskap, Ås

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