

NORDIC TOURISM PLAN 2025-2030



CONTENTS

PREFACE BY THE CHAIRMANSHIP 2024	3
TOURISM IN THE NORDICS AND BEYOND	5
NORDIC TOURISM PLAN 2025-2030	8
BACKGROUND FOR THE NORDIC TOURISM CO-OPERATION	15
ABOUT THIS PUBLICATION	20

This publication is also available online in a web-accessible version at:
<https://pub.norden.org/politiknord2025-709>



Photo: Jeff Sheldon / Unsplash



Photo: Robin Skjoldborg /
visitdenmark.dk



Photo: Travellingdede /
Shutterstock

PREFACE BY THE CHAIRMANSHIP 2024

At a time when the world is facing major challenges, few regions are better equipped to show the way forwards than the Nordic Region. Our unique natural and cultural heritage, our common values, and our long tradition of intergovernmental co-operation provide opportunities and obligations to shape the sustainable tourism of tomorrow.

Although the Nordic tourism and hospitality industry is strong, it is having to face new challenges. The impact of climate change on our natural resources, changing travel patterns, and increasingly rampant global competition are all putting pressure on our ability to adapt, innovate, and communicate. At the same time, we're seeing how interest in the Nordic Region as a destination is growing internationally, driven by the pursuit of authentic experiences, untouched nature, and sustainable travel destinations.

With this joint plan, the Nordic countries are taking further steps towards deeper co-operation within the tourism and hospitality industry. We're joining forces to develop the Nordic Region as a leading destination for sustainable tourism. Our aim is to create a tourism and hospitality industry that not only generates economic growth and jobs, but also actively helps to preserve and strengthen our natural and cultural heritage for future generations.

The plan is based on three fundamental principles:

- Sustainability must permeate every aspect of tourism development
- Innovation and digitalisation must propel the industry's competitiveness
- Cross-border co-operation must strengthen the Nordic community

We're united in our belief that sustainable tourism can be a force for positive change. By sharing our knowledge, resources, and experiences, we can build a tourism and hospitality industry that contributes to the fulfilment of the global sustainable development goals while also strengthening the Nordic Region's international competitiveness.

Together, we will demonstrate that it's possible to combine economic growth with environmental and social responsibility. We invite all stakeholders in the Nordic tourism and hospitality industry to get involved in this key initiative for our common future.

For the Nordic Council of Ministers

Ebba Busch, Sweden's Minister for Energy, Business and Industry



Photo: Tina Axelsson /
imagebank.sweden.se



Photo: Peter Gudella /
Shutterstock



Photo: Christoffer Strange /
goboat.dk

TOURISM IN THE NORDICS AND BEYOND

Tourism is positioned at the extreme end of both the local and the global. It permeates economic, social, cultural, and environmental conditions at all levels. Globally, the economic impact of tourism is significant and growing. The pandemic and subsequent economic downturn put a dent on the growth curve of the tourism industry globally, but in 2023 the contribution of the travel and tourism sector to global GDP stood at 9,1%, which is only 4,1% below the 2019 level.^[1]

The size and economic importance of the tourism sector varies somewhat in the Nordic countries, but the industry is of central importance throughout the region. This is of course due to the economic impact of the industry, but also to the multifaceted impact of tourism on other economic sectors, as well as on local communities and on the environment.

The Nordic Tourism Plan acknowledges that there are no easy solutions when it comes to policy and development in the tourism sector. Tourism is a complex sector representing several industries, where it can be challenging to identify and align common goals and interests. Any policy on tourism and frameworks for collaboration must therefore deal with the complexity of the sector and the many converging interests which the industry in all Nordic countries represents

1. World Travel & Tourism Council. 2024. Note that the provider of the statistics is not an official organization.

The social and environmental impact of the tourism industry may be hard to evaluate in absolute terms, but the impact is significant and undeniable, and social and environmental parameters remain central to regional and national tourism policy. The extent of the impact of tourism onto the local backdrop makes it important that public policy and governance of the sector is proactive and relevant and that effective measures and tools to develop the industry and its destinations are in place.

While tourism poses challenges to local communities and the environment, it has important potential for creating economic growth and development. The positive impact of tourism on local economies and communities can be significant and it is important that measures to develop the industry pay particular attention to the ways in which tourism can contribute positively or even regeneratively to local economies and environments.

The Nordic tourism sector itself is also susceptible to global changes and trends. Among the most evident trends are changing demographics among travellers and the emergence of new markets, digitalization, and new and disruptive business models, as well as a range of social, cultural, and environmental challenges.

In 2023, [Nordic Innovation](#), mapped the biggest challenges for Nordic tourism. In a project involving 300 representatives from Nordic tourism businesses and other stakeholders, participants were asked to identify key challenges to innovation and improvement in the tourism industry in the Nordics. Key challenges identified, concerned seasonality and workforce, complexities of switching to sustainable business models as well as hurdles related to environmental issues, digitalisation, and transportation. Moreover, issues such as diversity, equity and inclusion were also identified as challenges with potential to be turned into opportunities.

Key challenges to be addressed by the Nordic Tourism Plan 2025-2030, are in alignment with the challenges identified by the Nordic Business Ministers in their policy for the business sector, the collaboration program for the period 2025-2030:

- Reaching national and international environmental goals
- Global competition
- Technological and digital development
- Geopolitical challenges
- Demography and societal trends

In tackling and addressing challenges faced by the tourism sector, the Nordic Tourism Plan will contribute to the overall strategy of the Nordic Business Ministers.

The Nordic Tourism Plan acknowledges that there are no easy solutions when it comes to policy and development in the tourism sector. Tourism is a complex sector representing several industries, where it can be challenging to identify and align common goals and interests. Any policy on tourism and frameworks for collaboration must therefore deal with the complexity of the sector and the many converging interests which the industry in all Nordic countries represents.

Purpose of the Nordic Tourism Plan 2025-2030

The purpose of the Nordic Tourism Plan 2025 - 2030 is to strengthen Nordic tourism cooperation and support and facilitate growth in the tourism industry in the region. The Nordic Tourism Plan is a strategic document which is aligned with and supports the overall strategy for Nordic cooperation in the business sector and the objectives of Vision 2030. Activities carried out as part of the plan should complement national tourism strategies and provide Nordic added value.

The operating environment for the tourism industry can be improved by ensuring competitive and effective framework conditions in the Nordic countries. This requires a more structured collaboration between Nordic policymakers to develop and implement tourism related policies, including the development and implementation of Nordic and international best practices. Through creating and sharing knowledge, the tourism sector can better understand and meet current and future needs and expectations, while developing sustainable and competitive products and services. The Nordic Tourism Plan should contribute to closer Nordic cooperation on how to make and keep Nordic destinations sustainable, competitive, innovative, and attractive.



Photo: Yadid Levy / norden.org



Photo: Marie Ullnert /
imagebank.sweden.se



Photo: Laura Vanzo /
visitfinland.com

NORDIC TOURISM PLAN 2025-2030

Focus areas for Nordic Tourism Collaboration and recommendations

The Nordic Tourism Plan 2025-2030 consists of three main sections; Competitive Nordics, Attractive Nordics, and Innovative Nordics. Sustainability is a cross cutting theme in all the three sections and an underlying premiss for the plan and the recommendations made for future collaboration. Together with sustainability the priority areas for cooperation are factors that strengthen the competitiveness of Nordic Tourism.

Sustainable tourism in the Nordics

Sustainability within tourism is simultaneously a critical challenge and an opportunity for the Nordic region. As tourism grows, so does its environmental, economic, and social impact, necessitating a comprehensive and collaborative approach to ensure a balance between development and preservation. Working towards sustainability in tourism requires a balanced approach, addressing environmental, economic, and social impacts. Through collaborative efforts, innovative solutions, and a commitment to sustainable practices, the Nordic region can lead the way in creating a tourism industry that benefits all.

The objective of the recommendations made in the Nordic Tourism Plan is to address the following facets of sustainability in Nordic tourism:

Environmental impact

Tourism contributes to carbon emissions, particularly through transportation. Mitigating these effects is crucial in the fight against climate change. Additionally, tourism can disrupt natural habitats, threatening biodiversity. Effective resource management is essential, for instance concerning water and energy consumption in high-traffic tourist areas. Implementing sustainable practices can help protect the nature and natural landscapes that attract visitors to the Nordic region.

Economic Considerations

While tourism bolsters local economies, an overreliance on the sector can create vulnerabilities, as experienced during economic downturns or pandemics. Ensuring economic resilience involves diversifying local economies and improving job quality within the tourism sector. Workers must receive fair wages and work under decent conditions to maintain the industry's sustainability and attractiveness as an employer.

The dual role of the platform economy, increasing flexibility to work vs. uncertainty about income, is recognized as a characteristic of labour conditions in tourism. Seasonal fluctuations pose significant challenges, with peaks and troughs in tourist numbers affecting local economies and environments. Measures to promote year-round tourism can help mitigate these effects, providing more stable economic benefits and reducing environmental pressures during peak seasons.

Social and Cultural Impact

Tourism can displace local communities, disrupt traditional lifestyles and lead to the commercialisation of culture and the erosion of cultural heritage. Managing visitors to avoid overtourism is essential to prevent social and environmental stress, ensuring that the presence of tourists does not degrade the experience for both visitors and locals. When managed with consideration of local interests, tourism can enhance wellbeing of local communities and indigenous people, provide jobs, increase service offering for residents and support the appreciation of local culture and heritage.

Policy and Governance

Robust regulation and effective enforcement are vital for promoting sustainable tourism practices. Policymakers must collaborate with businesses and communities

to create and enforce standards that protect the environment, support local economies, and preserve cultural heritage. Such collaboration ensures that sustainable tourism is a shared goal for all stakeholders.

FOCUS AREA 1 – Competitive Nordics

Resilience is essential for profitable business activities and for the competitiveness of the tourism sector, especially in crises like those experienced in recent years. The actions taken to increase competitiveness should be efficient and appropriate for tourism businesses of all sizes. Strengthening knowledge-based decision making, facilitating the transition to sustainable development and growth, and supporting skills development of the tourism workforce are all important elements in relation to the strengthening the competitiveness of the tourism sector. Collaboration and close networking between policy and decision makers, national and regional tourism organisations, tourism businesses, and other tourism stakeholders are a prerequisite for the actions and for sustainability and competitiveness of the sector across the Nordic region.

Priorities for cooperation:

Comparable and comprehensive statistics and data

Comparable and comprehensive statistics and data are essential tools for strategic planning, management, and decision-making in the tourism sector. They provide a foundation for evidence-based policies and initiatives that contribute to the sustainable growth and competitiveness of the Nordic tourism industry. A more structured collaboration is proposed to improve the quality and comparability of data for national policymaking, simultaneously providing possibilities for increased data sharing and common Nordic statistics and analysis projects. Enabling increased data sharing will also accelerate the creation of valuable sustainable solutions. In addition to data, it is important to share more informed insights and perspectives on new phenomena, weak signals and emerging trends. This would facilitate preparedness for global crises and enable early intervention in smaller issues across the Nordic region.

Transition to sustainable development and growth

Climate change will have a significant impact on tourism and the impacts can be both positive and negative. These changes should and could be considered together. Facilitating the transition to sustainable development and growth in the tourism industry requires a multifaceted approach that involves all stakeholders, including governments, businesses, local communities, and tourists. Promoting the green transition, circular economy, responsible business practices, community involvement and empowerment as well as sustainable tourism practices among tourists are of equal importance for Nordic collaboration.

Skilled workforce

Tourism generates employment opportunities and serves as a catalyst for economic growth and diversification. A skilled workforce is an essential asset for the Nordic tourism sector. It contributes to service excellence, customer satisfaction and safety, destination image, and overall industry competitiveness. Investing in the education, training, and professional development of the workforce is essential for sustaining and enhancing the region's tourism industry. At the same time, skills supply is one of the tourism industry's biggest challenges and after Covid, the industry faces a shortage of labour across the region. Working together in the Nordics, on developing employee wellbeing and competence could help improve long term growth of the sector.

FOCUS AREA 2 – Innovative Nordics

Over the last decades, global trends and new digital technologies have transformed the tourism industry in the Nordic region. Innovation based on digital technology has facilitated the emergence of new and disruptive business models which have changed the way businesses operate as well as the way clients and markets respond. These changes are driven by what have become internationally dominant companies and countless other technology and data-driven businesses capitalising on opportunities within tourism. Technological innovation and use of new technologies are, however, no less important to the vast array of smaller tourism businesses throughout the region.

Digital innovation can strengthen local economies and capabilities and increase the value of customer experience and the value of products and services offered. The importance of social media and interactive digital services in reaching new and niche markets will only grow in importance in future years.

Supporting the industry's ability to adopt emerging technologies can play a significant role in achieving sustainability. There are important opportunities in

using digital technology to increase safety and to control traffic and overcrowding. Technology can enhance data collection and management, leading to more informed decision-making. Smart digital solutions can guide tourists towards more eco-friendly choices. Efficient use of data, digital technology and AI are crucial to counteract seasonality. AI and emerging technologies enable streamlining and improving the quality of operations and services as well as scaling sustainable and circular business models in the Nordic tourism industry. Emerging technologies can play a crucial role in solving ecological challenges, and in working towards increased, equity, and social inclusion.

With data at the core of business models, concerns related to cybersecurity and secure data management become more central. These concerns should be addressed in order to leverage the potential of digital technologies for the increased competitiveness and sustainability of the industry.

Priorities for cooperation:

Scaling existing green and sustainable solutions

A big potential lies in scaling existing, green, and sustainable, solutions throughout the Nordics and beyond, rather than developing new pilots. Rapid implementation of solutions and technologies that are ready for market will increase the speed of change towards Vision 2030. Scaleup of existing solutions is essential in the Nordic tourism industry where the startup scene is fragmented and where a relatively large proportion of enterprises are SMEs with limited capacity for technological innovation.

Strengthening smart destinations

To increase the sustainability, attractiveness and competitiveness of Nordic destinations, efforts should be continued to lift and encourage new and disruptive digital ideas, with focus on smart destinations. Cross-sectoral innovation cooperation, in particular with technology developers, is needed to increase the speed of the transition. Increased digital tourism requires strengthening tourism industry ecosystems, where best practices can be shared and where arenas are created for the pooling of knowledge and resources, innovation collaboration and scaling.

FOCUS AREA 3 – Attractive Nordics

In the international market, the Nordic region is often regarded as a distinctive and inspiring destination characterized by common ideas and values. Even though the characteristics of the different countries vary, this shared image creates a dynamic and positive appeal for the Nordic region.

International competition is intensifying with more nations investing increasingly in the promotion of their own countries and destinations. Through a balanced and proactive promotion strategy, based on the development of more sustainable, regenerative, and authentic tourism products, the Nordics will be able to continue to attract visitors while preserving their unique identity and values. Working collaboratively to strengthen the Nordic region as a unified, appealing, and sustainable destination is the key to facing growing competition and maintaining the position of the Nordics as a prominent tourist region with a dynamic and attractive tourism industry on the global stage. The appeal and attractiveness of destinations must be achieved through strengthening environmental and social sustainability, wellbeing of local communities and through making the tourism sector an attractive workplace.

Priorities for cooperation:

Destination development to benefit local communities

An attractive tourism industry should have an enabling and positive impact on local communities and take account of the needs of both visitors and residents. It is important to explore residents' sentiments towards tourism and develop tools that empower residents to participate in tourism development and contribute to the regeneration of natural and cultural resources of destinations. This can e.g., be achieved through involving residents in destination management, the development of visitor strategies and responsible marketing of tourism destinations.

Attracting tourists through responsible marketing

It is important to continue collaboration on attracting more sustainable type of tourists to the region. This refers to tourists travelling outside peak-season and outside hot-spots, tourists who stay for a longer time and those interested in local products and experiences while being respectful of local values. To achieve results in attracting the more sought-after visitors, more product development and more promotional activities are needed towards both the travel trade and end-consumers. This must be achieved with more creativity and in a more efficient manner than our competitors do.

Attracting partners in other sectors

Due to tourism's intersectoral nature, there is huge potential in the collaboration of the tourism sector with other sectors. More awareness could e.g., be given to the Nordic region as a travel destination for food and culture travel, a collaboration which could benefit the image and exports of both the food and culture sectors. Another intersectoral potential can be found in further developing business tourism, through stronger focus on attracting congresses and conferences related to strongholds within Nordic business sectors, such as e.g., such as energy, life science, digital services and fintech. In addition to the thematic collaboration, the cross-border cooperation between tourism service providers and enforcement and rescue authorities is essential in facilitating e.g., cross-border service providing.



Photo: Vidar Nordli-Mathisen /
Unsplash



Photo: Simon Paulin /
imagebank.sweden.se



Photo: KimKimsenphoto / iStock

BACKGROUND FOR THE NORDIC TOURISM CO-OPERATION

In 2017 the Nordic Business Ministers (MR-N) decided to prioritise tourism as one of the focus areas for Nordic cooperation. To facilitate increased and a more strategic cooperation at the Nordic level, the ministers decided that a Nordic Tourism Plan should be developed. The Plan for Nordic tourism cooperation 2019-2023 was published in 2019 (The Nordic Tourism Plan). The plan was intended to support national tourism strategies and policies and to address national and regional challenges, while also supporting sustainable growth in the tourism industry in the region.

In 2016 Nordic tourism policy officials initiated an informal group to strengthen their cooperation on strategic issues in relation to tourism in the region. The group developed the first Nordic Tourism Plan decided on by Nordic Business Ministers (MR-N) in 2017.

The Nordic Tourism Working Group (NTWG) was formally established in 2019 to oversee implementation of the Nordic Tourism Plan. NTWG was also given a mandate to operationalise the plan and oversee Nordic tourism cooperation in relation to the plan. This includes proposing projects and activities for funding to implement the plan. The group also has a role in developing and proposing policy recommendations regarding tourism in the context of The Nordic Council of Ministers. The group reports to the Nordic Committee of Senior Officials for the Business Sector (EK-N). Projects and actions proposed by the group are primarily funded through the annual budget of EK-N.

In 2021, under the Finnish presidency of the Nordic Council of Ministers, the Business Ministers committed to financing at least 20 MDKK to tourism activities during the period 2021-2024. This commitment has been instrumental in securing financing for the implementation of the plan.

Vision 2030

The Nordic region will be the most sustainable and integrated region in the world by 2030. This is the ambition of Vision 2030, adopted by the Nordic Council of Ministers and the Nordic Prime Ministers in August 2019. As the Nordic Council of Ministers renews its strategy for the period 2025-2030, the key strategic goals for Vision 2030 remain unchanged: A green Nordic Region, A Competitive Nordic Region and A Socially Sustainable Nordic Region.

As part of the renewal of the overall strategic plan for the implementation of Vision 2030, the Nordic Business Ministers have also renewed the strategic priorities for the business sector. The new strategy, or collaboration program, which is aligned with Vision 2030, and endorsed by the Nordic Business Ministers on 4th October 2024, describes the political priorities and objectives for the business sector for the period 2025 – 2030. The foundation of the new strategy rests on three key strategic objectives;

1. The green and digital transition must be accelerated
2. The Nordic region as a leader in sustainable business models and circular economy
3. Stronger regional and global market opportunities for Nordic Businesses

The Nordic Tourism Plan is intended to strengthen Nordic tourism cooperation under the auspices of the Nordic Council of Ministers for Business (MR-N), and thereby enable and ensure sustainable growth in the tourism industry in the region.

Organisational structure and implementation

The Nordic Ministers for Business (MR-N) form a part of Nordic Council of Ministers for Sustainable Growth (MR-Growth) and are the highest decision-making body for Nordic co-operation on business policy. Under the auspices of MR-N, the Nordic co-operation on business policy is facilitated by the Nordic Committee of Senior Officials for Business Policies (EK-N). In addition, [Nordic Innovation](#), an organisation under the Nordic Council of Ministers, which initiates and funds activities that support MR-N/EK-Ns policy objectives.

The formal responsibility for implementation of the Nordic Tourism Plan 2025-2030 lies with MR-N/EK-N. The Nordic Tourism Working Group (NTWG) is established by EK-N and receives its mandate from the committee. NTWG will continue to have the mandate to oversee the implementation of the tourism plan and to co-ordinate activities under the auspices of the Nordic Council of Ministers for Business (MR-N). Furthermore, the group will facilitate co-ordination between the Nordic countries on issues regarding Nordic tourism and serve as a voluntary advisory group for Nordic committees and organisations on tourism matters. The group will report to MR/EK-N on the implementation of the plan and on achieved results. This includes identifying and proposing necessary analytical work and identifying and proposing projects to be financed.

The Nordic Tourism Plan 2025-2030 will primarily be put into practice through the annual budget of the Nordic Committee of Senior Officials for Business Policies (EK-N) and through Nordic Innovation.

Activities undertaken to implement the plan should complement policies and programmes on tourism, in the countries and create Nordic added value. Initiatives to implement the plan must have clear ownership as well as a clear assignment of responsibility. National ministries responsible for tourism and national tourism institutions/agencies are expected to contribute to the implementation of the plan. Individual countries, i.e., ministries, institutions, and the like, can take a leading role in relation to individual activities and projects.

Cross-sectoral cooperation

The Nordic Council of Ministers' policy program for Vision 2030 puts particular emphasis on cross sectoral cooperation to achieve synergies and a stronger impact in the implementation of its activities and programmes. The tourism industry encompasses particularly many inter-sectoral touching points and cross cutting interests, including environmental, cultural, social, and technological considerations.

Cross-sectoral co-operation is also crucial to leverage the potential of scaling existing solutions throughout the Nordic tourism industry. The benefits to be gained from cross-sectoral cooperation involving the tourism sector are therefore particularly relevant and important and it is expected that the implementation of the Nordic Tourism Plan will involve significant cross-sectoral initiatives.

Target group

The primary target group for the Nordic Tourism Plan are national authorities, policy makers and government institutions, while keeping a strong focus on tourism enterprises and the industry as the end beneficiary of the plan and its recommendations for actions. A primary objective of the plan is to increase collaboration between public organisations that work within tourism for the benefit of the tourism industry

Communication

Communicating on the role, impact and possibilities of tourism is an important part of increasing public knowledge and raising the political profile of the sector. Communicating on results achieved through Nordic tourism cooperation and the results of projects and programs set in motion to effect positive change is therefore an important part of operationalising the Nordic Tourism Plan. Communication on the Nordic tourism cooperation communication should take place in collaboration between NTWG and NCM, using the official channels of the Nordic Council of Ministers.

To support communication on the Nordic tourism collaboration, NTWG has initiated Nordic Tourism Seminars, involving representatives from the industry from all the Nordics. There is also continuous need for increased cooperation and dialogue between the tourism sector, policy makers and other relevant stakeholders to strengthen knowledge of the meaning and role of tourism in the Nordics and facilitate better policy coordination between different economic sectors, ministries, and other public authorities.

Evaluation of the cooperation

In 2023, NTWG proposed that Nordic tourism cooperation should be evaluated with the objective of gathering learnings and providing input for improving the cooperation and to give direction for a new Nordic Tourism Plan. The external evaluation was conducted in the fall of 2023 by the Danish consultancy firm [Norion Consult](#).

Key takeaways from the evaluation are that the Nordic tourism cooperation has been successful in implementing projects in alignment with the Nordic Tourism Plan. According to the findings of the evaluation, the cooperation has yielded significant national and Nordic value, particularly through increased networking and cooperation, and through contributing to placing the tourism industry on the Nordic political agenda. The evaluation calls for strengthened co-operation on sustainable tourism and encourages NTWG to put more focus on issues related to circular economy and the strategic use of statistics, data, and analysis. The Nordic Tourism Plan for the period 2025 – 2030 draws on valuable insights from the evaluation and builds further on the experience and knowledge exchange developed by NTWG since the start of the Nordic Tourism Collaboration in 2019.

ABOUT THIS PUBLICATION

Nordic Tourism Plan 2025–2030

PolitikNord 2025:709

ISBN 978-92-893-8183-3 (PDF)

ISBN 978-92-893-8184-0 (ONLINE)

<http://dx.doi.org/10.6027/politiknord2025-709>

© Nordic Council of Ministers 2025

Cover photo: Clive Tompsett/imagebank.sweden.se

Layout: Agger Grafisk Design

Published: March 2025

Nordic co-operation

Nordic co-operation is one of the world's most extensive forms of regional collaboration, involving Denmark, Finland, Iceland, Norway, Sweden, and the Faroe Islands, Greenland and Åland.

Nordic co-operation has firm traditions in politics, economics and culture and plays an important role in European and international forums. The Nordic community strives for a strong Nordic Region in a strong Europe.

Nordic co-operation promotes regional interests and values in a global world. The values shared by the Nordic countries help make the region one of the most innovative and competitive in the world.

The Nordic Council of Ministers

Nordens Hus

Ved Stranden 18

DK-1061 Copenhagen

pub@norden.org

Read more Nordic publications on www.norden.org/publications