

# Outdoor recreation in the nature-based tourism domain: Insights from an International Delphi survey

Peter Fredman<sup>1</sup>, Jan Vidar Haukeland<sup>2</sup>, Liisa Tyrväinen<sup>3</sup>, Dominik Siegrist<sup>4</sup>, Kreg Lindberg<sup>5</sup>

<sup>1</sup>Norwegian University of Life Sciences, NMBU: [peter.fredman@nmbu.no](mailto:peter.fredman@nmbu.no), <sup>2</sup>Institute of Transport Economics, Norway, <sup>3</sup>Natural Resources Institute Finland, <sup>4</sup>University of Applied Sciences Rapperswil, Switzerland, <sup>5</sup>Oregon State University, USA

## Background

While recreation in the outdoors has a long tradition in the Nordic region under the “friluftsliv” parasol, changes in recreation behavior the last decades point at increasing commercialization through the “outdoor” and “nature-based tourism” industries (Buckley, 2000; Elmahdy et al., 2017; Margaryan & Fredman, 2017). What used to be close-to-home and not-for-profit activities has increasingly developed into commodities for trade, representing significant commercial values. Understanding this change is crucial for the future development of both the outdoor recreation and nature-based tourism sectors. Hence, this study uses experts’ opinions to analyze what outdoor recreation activities have a potential to develop into new or existing commercial products in a nature-based tourism context.

## Delphi survey design

The Delphi method is a structured communication technique that involves exploratory qualitative research, soliciting opinions from experts in several consecutive questionnaires with controlled feedback (Landeta, 2006). This method is well suited for complex problems involving uncertainty, including tourism (e.g. Donohoe, 2011) and recreation (Austin et al., 2010).

The current survey, undertaken in 2017-2018, had three rounds of questions, one with open-ended questions (Round 1) and two with close-ended, Likert scale questions (Round 2 and 3). The first round targeted activities people do in the outdoors for recreation and asked the experts which ones they think will increase and/or decrease in terms of participation rates. The second round focused on the activities experts identified as increasing in the future, and concerned the potential to develop commercial products offered by the nature-based tourism sector within the next 10 years. The questions in the third round were identical to the second: Responses to the second round were reproduced together with the average response across all experts in each country. Respondents could then see how their answers compared with the other experts, and in light of this consider their answers with an opportunity to make changes.

### Expert panels

The study included 70 experts in Norway, Sweden, Finland, the European Alps region and Western United States. In order to capture the diversity of the recreation sectors, experts are from a range of private and public domains: National or regional ministries; regional tourism associations; tourism marketing organizations; nature-based tourism companies and associations; outdoor industry (equipment, clothing); outdoor recreation organizations; academia and consultants; special interest media; and youth organizations.

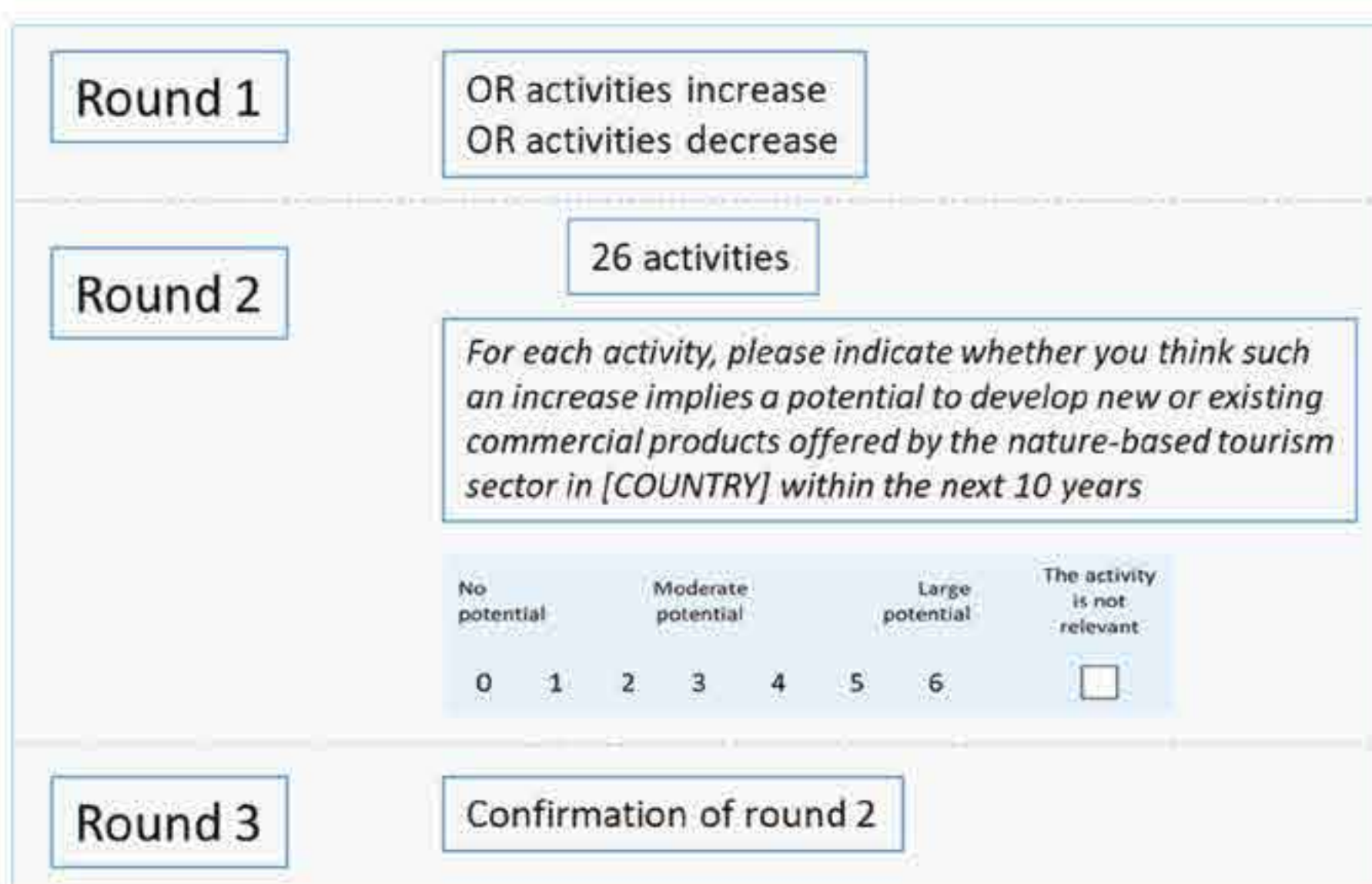


Figure 1. The Delphi survey design.



Photo: Hampus Fredman

## Results

Table 1 provides an overview of the activities experts thought will increase within the next 10 years mentioned by two or more experts in each country respectively. Biking and hiking are the most frequently mentioned activities in all countries. The biking activity is the most diverse, including traditional biking on roads as well as mountain biking, biking in wilderness, biking with accommodation and food, winter biking, fat-biking, and e-biking.

Looking at all five countries, results show that eight activities – which seems to be a “cut-off” number as the next set of activities score 4 or higher in only two countries. Based on this measure, activities with the largest potential to develop new or existing commercial products are: mountain biking (on trail/ off trail); electric bikes (e-bikes); nature photography; hiking/ backpacking/ trekking; wildlife watching; sport events in nature; cycling (on road/ path); and kayaking/ canoeing (flat water).

Table 1. Considering the many different activities people can do in the outdoors for recreation in [COUNTRY], which activities do you think will noticeably increase in terms of participation?

NORWAY	Freq	SWEDEN	Freq	FINLAND	Freq	EUROPEAN ALPS	Freq	WESTERN USA	Freq
Biking	12	Biking	11	Biking	7	Biking	9	Biking	5
Hiking	10	Hiking	8	Hiking	4	Hiking	7	Hiking, walking, backpacking	4
Skiing	9	Running (in wilderness)	4	Canoeing, kayaking	2	Skiing	4	Distance running, trail running	3
Kayaking, paddling	6	Skiing	3	Fishing	2	Nature excursions	3	Paddling	3
Fishing	5	Kayaking	3	Frisbee golf	2		Photography	2	
Bird watching	3	Multisport (swimrun)	2	Husky, reindeer rides	2		Motorized activities	2	
Friluftsliv	2	Skating (in wilderness)	2	Nature photography	2				
		Bird watching	2						

Hiking also represents several different sub-categories such as walking, trekking, hiking with accommodation and good food, soft hiking and backpacking. Skiing was mentioned by at least one expert in all countries, but significantly more so by experts in Norway and the Alps. This is yet another activity that comes in many versions, such as downhill, cross-country, randonee, off-piste and back-country skiing.

### Activities with commercial potential

Table 2 shows the scores from the third and final (confirmatory) round of surveys, where the experts indicated to what degree increasing activities implies a potential to develop new or existing commercial products offered by the nature-based tourism sector in each country respectively. Figures in bold have an average score of 4 or higher (from the six-point scale), representing a moderate-large commercial potential.

Table 2. Average scores from the third and final (confirmatory) round of surveys.

	Norway	Sweden	Finland	Alps	US	TOTAL	Score ≥ 4 <sup>1</sup>
Mountain biking (on trail/ off trail)	4,4	4,8*	4,7*	4,8*	4,7*	4,7*	5
Electric bikes (e-bikes)	4,6*	4,5*	4,4*	5,4**	3,9*	4,6*	4
Nature photography	4,8*	3,8	5,7**	4,1	4,3	4,5*	4
Hiking/ backpacking/ trekking	4,7*	4,9*	4,4	4,9*	3,6	4,5*	4
Wildlife watching	4,9*	4,2	4,6*	4,3*	4,4	4,5*	5
Sport events in nature (marathon, trail run, triathlon, orienteering etc.)	4,0	4,3	4,0*	3,7	4,4	4,2	4
Cycling (on road/ path)	4,8*	4,2	4,0*	4,4	3,6	4,2	4
Kayaking/ canoeing (flat water)	4,3	4,3*	4,6*	2,8	4,9*	4,2	4
Fishing	4,5*	3,9	5,0*	2,6	3,5	3,9	2
Cross-country skiing/ backcountry skiing	4,1	3,8	4,4*	3,6	3,3	3,9	2
Snowshoeing	3,9	3,3	4,1	4,4	3,1	3,8	2
Trail running	3,6	4,4	4,0	3,0	3,3	3,6	2
Rafting/ kayaking (whitewater)	3,6	3,2	3,4	2,8	4,9*	3,6	1
Ski touring/ Alpine touring/ randonee	4,7*	3,5	2,5	3,8	3,1	3,5	1
Paddleboard/ stand-up paddling	3,5	2,9	4,0*	2,4	4,5*	3,5	2
Motorhome/ Campers	3,7	3,5	3,6	2,8	3,4	3,4	0
Rock climbing/ bouldering	4,1	3,5	2,7	3,1	3,4	3,4	1
Animal-based snow sledging/ sledding/ riding (horse, reindeer, etc.)	4,0	3,7	3,9	2,4	2,7	3,3	1
Ice-skating on natural waterbodies	3,1	3,8	4,6*	2,8	2,0	3,2	1
Mountaineering	4,1	3,6	1,9	3,3	3,0	3,2	1

<sup>1</sup> Number of countries with an average score of 4 or higher.  
\* Over 50% of the experts indicate “large potential” (5 or 6).  
\*\* Over 80% of the experts indicate “large potential” (5 or 6).