



Bridging outdoor recreation and nature-based tourism in a commercial context: Insights from the Swedish service providers



Lusine Margaryan^{a,*}, Peter Fredman^b

^a Department of Tourism Studies and Geography, Mid Sweden University, Kunskapens Väg 1, 83125 Östersund, Sweden

^b Department of Ecology and Natural Resource Management (INA), Norwegian University of Life Sciences, Universitetstunet 3, 1430 Ås, Norway

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ABSTRACT

This paper investigates how outdoor recreation demand is reflected in the commercial tourism supply. We bring together the demand and the supply perspectives as well as the domestic and international dimensions, i.e. linking outdoor recreation with nature-based tourism. The data is collected through a nation-wide survey among nature-based tourism providers, catering to both domestic and international markets in Sweden. Four major data-driven avenues of commercializing outdoor recreation are discussed (*Winter/Nordic*, *Summer/Active*, *Summer/Relaxing* and *Extractive*) and further profiled against external variables, such as types of business operations, international markets or seasonality. The findings offer a new insight into the patterns of the commercial supply of nature-based tourism in Sweden, while also building on the previous research and history of outdoor recreation. Evident commercial importance and domestic popularity of such ordinary outdoor activities as cycling on roads, swimming, jogging, picnicking or hiking outside mountain areas are linked to changes in leisure and lifestyles noticed previously. Commercialization of outdoor recreation, a snapshot of which is presented in this study, is discussed as an ever-expanding and diversifying process, observed both in Sweden and globally.

Management implications: From a management perspective it is important to know that the provision of nature-based services, specialized equipment and organizing events in nature are the top-selling services by the nature based tourism operators, all of which have been described as important indicators of commodification of outdoor recreation. Important drivers of a new demand are- the observed trends of growing preference for shorter, more intense and high quality holiday,- the growing demand and acceptance of higher accessibility and facility density- the disconnection from nature as a result of changing lifestyle and growing urbanization.

1. Introduction

It has been widely observed that outdoor recreation (OR) is becoming increasingly commercialized (Aasetre & Gundersen, 2012; Bottenburg van & Salome, 2010; Cousins, Evans & Sandler, 2009; Duffy, 2015; Fredman & Heberlein, 2003; Fredman, Lundberg, & Wall Reinius, 2014; Gössling & Hultman, 2006; Keul, 2014; Mosedale, 2015; Sandell & Boman, 2014; Varley & Semple, 2015). Simply put, natural phenomena and activities in nature which were not perceived as a product before or, in other words, were not commodified, increasingly become part of the market (Keul, 2014; Fredman, Wall-Reinius, & Grundén, 2012). Already in the 90s, Wearing and Wearing (1992) noted that even such a simple outdoor activity as jogging was being transformed by the commerce, fashion, technology, media and other businesses into a multi-million dollar industry. There has been a shift away from a simple non-commercial outdoor recreation culture

towards a more sophisticated demand-driven commercial sector with new forms of recreation and a prospering outdoor retail industry, spawning myriads of businesses (Buckley, 2000; Backman, Arnegård, & Sandell, 2011; Fredman, Stenseke, & Sandell, 2014).

While much has been written on the changing nature of OR demand, i.e. changing preferences and behavior patterns of recreationists, comparatively less research attention has been paid to the commercial supply of this sector, especially in the Nordic context (Fredman & Tyrväinen, 2010; Lundmark & Müller, 2010). In addition, less research attention has been paid to non-resident outdoor recreationists, i.e. tourists, comparing to the data existing on domestic OR participation (Fredman, Boman, Lundmark, & Mattsson, 2012). The OR demand and supply have rarely been brought together to see how one is reflected in the other. There are several possible reasons for this, e.g. OR occurs both in non-commercial as well as commercial context; the commercial provision of OR caters to both domestic and

* Corresponding author.

E-mail addresses: lusine.margaryan@miun.se (L. Margaryan), peter.fredman@nmbu.no (P. Fredman).

international tourist markets, which already falls into the research domain of nature-based tourism. The concepts of OR and nature-based tourism, contiguous but dissimilar, often stem from different streams of literature and fail to overlap, being scattered throughout various disciplines (Pröbstl & Haider, 2013). The main aim of this paper is to bridge these two perspectives in the commercial context. The case of Sweden presents a unique opportunity to successfully do this, since the domestic outdoor recreation is strong enough to be the driving force of the commercial nature-based tourism provision, which is not the case in many parts of the world. *The objectives of this paper are the following: a) to analyze how the demand for OR is reflected in the commercial supply b) to bring the much-needed attention to the structure of nature-based tourism supply by looking at the case of Sweden.*

The modes of engaging in OR in Sweden have also been changing. While OR has traditionally been associated with rather simple and ordinary activities (e.g. hiking, biking, boating), supported by public authorities through investments in infrastructure and popularization of this lifestyle, the more recent development shows significant diversification and specialization of this sector (Backman et al., 2011; Fredman, Lundberg, & Wall Reinius, 2014; Fredman, Stenseke, & Sandell, 2014; Fredman, Stenseke, Sandell, & Emmelin, 2014; Sandell & Sörlin, 2008). On the other hand, Sweden experiences annual growth of international tourist arrivals, with a significant share coming to engage in nature-based activities (Tillväxtverket, 2015a, 2015b), thus stimulating local businesses. In this context, we see an opportunity to bridge the demand and the supply perspectives as well as the domestic and international dimensions of the OR, which is a unique contribution of this study. This approach also sheds more light on the patterns within the nature-based tourism supply, which has not been comprehensively analyzed in Sweden, apart from several studies using relatively small-scale or convenience samples.

2. Literature review

2.1. Defining outdoor recreation and nature-based tourism

Outdoor recreation can simply be defined as leisure recreational activities occurring outdoors in urban and rural environments (Jenkins & Pigram, 2004). The long local tradition of OR, in its Nordic understanding of *friluftsliv* (open-air life), is characterized by simplicity, focusing on being outside in the landscape, with the intention of general well-being and nature experience, without the need for competition (Aasetre & Gundersen, 2012; Fredman, Lundberg, & Wall Reinius, 2014; Fredman, Stenseke, & Sandell, 2014; Fredman, Stenseke, Sandell, & Emmelin, 2014). It is sometimes argued that OR and the Nordic *friluftsliv* are not entirely interchangeable and former does not fully capture the spirit of the latter (Aasetre & Gundersen, 2012; Beery, 2011; Fredman, Lundberg, & Wall Reinius, 2014; Fredman, Stenseke, & Sandell, 2014; Fredman, Stenseke, Sandell, & Emmelin, 2014; Sandell & Sörlin, 2008; Varley & Semple, 2015), while other authors do not differentiate between these concepts (e.g. Wolf-Watz, 2015). According to the survey among the Swedish population, the most typical activities to represent OR are hiking in the mountains or forests, kayaking and bird-watching (Fredman, Lundberg, & Wall Reinius, 2014; Fredman, Stenseke, & Sandell, 2014; Fredman, Stenseke, Sandell, & Emmelin, 2014). Motorized activities were perceived as the least typical. Even though the non-motorized activities remain at the heart of the OR, the list of activities performed in nature for recreation purposes is growing.

Since the commercial activities in nature are enjoyed not only by the local recreationists but also long-distance travelers, the concept of nature-based tourism (NBT) also needs to be discussed. Recent literature suggests that NBT is a rather broad concept which may include virtually all types of tourist activities as long as they happen in relatively unmodified, undeveloped natural areas, outside one's home

environment (Fennel, 2012; Saarinen, 2014). In fact, NBT can include the whole tourism spectrum, ranging from mass tourism, adventure tourism to small scale ecotourism, but narrower definitions also exist (Lundmark & Müller, 2010; Newsome, Moore & Dowling, 2013; Saarinen, 2014; Valentine, 1992; Fennel, 2012). Differences and similarities between the concepts of OR and NBT have been extensively addressed in Emmelin, Fredman, Sandell, and Lisberg Jensen (2010) and Fredman, Lundberg, and Wall Reinius (2014), Fredman, Stenseke, and Sandell (2014) and Fredman, Stenseke, Sandell, and Emmelin (2014).

Even though there has been some critique calling for the abandonment of futile taxonomical and terminological efforts in favour of focusing on the practices and experiences (Weiler, 2012; Buckley & Coghlan, 2012), improving theoretical and conceptual understanding of these phenomena and their boundaries is still important. Multiple OR and NBT typologies have been suggested based on the analysis of both demand and supply, emerging from empirical data as well as conceptual generalizations. Nevertheless, despite multiplicity of definitions, it can be concluded that *friluftsliv*, OR and NBT all converge in the area which includes relatively simple, straightforward and non-competitive recreational activities in nature. By taking the perspective of the supply side, we these concepts together, since the businesses commercially provide their services indiscriminatorily to both domestic recreationists and international tourists. In this paper, the companies commercially providing leisure activities in nature are referred to as 'NBT companies', according to the established terminology (Fredman & Tyrväinen, 2010).

2.2. When outdoor recreation becomes commercial

Commercialization happens when a certain phenomenon becomes a commodity, i.e. is assigned a commodity status and integrated into the market economy. It is a condition under which an object or experience becomes evaluated primarily in terms of its monetary (or symbolic) exchange value (O'Connell, Potter, Curthoys, Dymont, & Cuthbertson, 2005). Gómez Baggethun and Ruiz-Pérez (2011) suggest that commodification process in the context of nature takes place through four main stages: economic framing, monetization, appropriation, and commercialization. Commercialization, therefore, can be understood as the final stage of commodification, when the commodified phenomena become readily available for mass consumption on the market. In other words, we can talk about commercial OR when recreational activities in nature are organized with the help of specialized service providers, involving monetary transactions.

Leisure is commodified when market becomes the main avenue to access leisure resources. Three stages of this process are suggested (Butsch, 1984): the pre-commodity era; the phase of commodification in which leisure participants lose control of the means of 'leisure production'; and the final phase, in which the leisure itself becomes shaped by the demands of the capitalist leisure industry. Within the Marxist tradition, this process has been criticized as yet another way of creating a docile consumer, whose main 'freely chosen' leisure activity is consumption (Butsch, 1984; Rojek, 2005). This may result from e.g. losing the access to the means of participating, i.e. access to the places, knowledge, skills, materials or technology used in a particular activity. This 'deskilling' or 'alienation of leisure' (Butsch, 1984) implies progressive dependence on commodities, transforming leisure participants into consumers. Similar processes have been described in various leisure activities, ranging from music production (Patterson, 1975), adventure (Cloke & Perkins, 2002), mountaineering (Johnston & Edwards, 1994) to hobby airplane modeling (Butsch, 1984). Commodification can be seen in professionalization of various services (an exchange of safety, knowledge and skills for money), growth in marketing and sales of specialized equipment or transformation of backcountry experiences into sports and media-covered spectator events (O'Connell et al., 2005; Sandell & Boman, 2014).

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