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MEASURING THE SUCCESS OF THE VISIT ARCTIC EUROPE

The final report

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“The success of VAE”-slide

Appendix 1. Incoming tourists to VAE airports

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1. Logframe matrix as a method

In order to measure the success of the project, Logical Framework Matrix is used as a method of this measurement. It is a part of Logical Framework Approach (LFA), which is a planning and implementing tool for development projects which EU has required from its funded projects since 1993. LFA is about background analysis of stakeholders, challenges, objectives and strategy, kind of a planning process which ends up to logical the framework matrix (LFM) as a result (Table 1). It highlights the objectives of the project, the activities to reach these objectives, resources required, assumptions and risks in implementing and measurement of the progress. (Alila, Jokelainen, Nurminen, Paukkala & Penttinen, 2003; Loogisen viitekehyksen lähestymistapa; Rasimus, 2011.)

Table 1. Logical framework matrix.

<i>Hierarchy of objects</i>	Performance indicators	Source and means of verifications	Assumptions and risks
Overall objectives			
Project purpose			
Intended results/outcomes I) Functional networking and cooperation II) R&D activities III) Improved accessibility IV) Concept development, marketing & communication V) Project management			
Project activities	Resources		

(Rasimus, 2011, p. 3; VAE LogFrame Matrix).

The focus of this rapport will be in the verification of those performance indicators. The assumptions and risks nor project activities and resources won't be covered. Visit Arctic Europe, or VAE will do a follow-up for five years so the project partners are going to continue the measurement. If not mentioned otherwise, the information reported in this rapport is from the project personnel. First up, the overall objectives.

2. Success indicators of the project

2.1 Logical framework matrix of Visit Arctic Europe

Table 2. VAE LogFrame matrix

<i>Hierarchy of objectives</i>	Performance indicators	Source and means of verification
Overall objectives: - Increased CBC networking and communication among tourism industry - New CBC tourism products and growth of sales - Improved accessibility to and within the region - Increased number of visitors - VAE II	- VAE area is well known unified tourism destination - Growth of the CBC business model among tourism industry - Growth on turnover among participating SME select - 7 % growth on overnights - accessibility - VAE II	- turnover of the tourism field in VAE regions -> statistics and taxation income - incoming tourists from target regions -> overnight statistics - VAE II decision
Project purpose: Northern-Scandinavia is an attractive integrated tourism destination with common vision	- Internationally recognised arctic destination, from tour operators point of view - Increased number of overnights also on shoulder and low-seasons, in selected market areas - Documented Increase of turnover among VAE participating SMEs	- VAE project final report - Project statistic, agreements with tour operators - Practice to report impact to SME turnovers
Intended results/outcomes:		
I) Functional networking and cooperation	- CBC interactions between VAE actors - CBC benchmarking - Scheme for the VAE CBC workshops and meetings - Common understanding of VAE competitiveness advantages - Tour operators reference group participation	VAE result reporting: - Documentation on VAE peer-learning visits - Ideas for VAE CBC products families and themes - Reference group feedback
II) R&D Activities	- R&D activities outsourced - Monitoring and - Evaluation guidance - Tourism trend study - Mapping the CBC obstacles - Customer Mobile behaviour	Tender documentation, project reporting delivered products by the R&D provider: - VAE LFA and M&E guideline for self-monitoring - Trend study - Report on mapped obstacles - Mobile behaviour study report
III) Improved accessibility	- Accessibility Toolkit demonstrating destination potential for transport carriers and other actors in the VAE region	- Published toolkit delivered to stakeholders, free access, electronic version - VAE map of inter destination transport connections and

	<ul style="list-style-type: none"> - VAE Internal travel-chain model in the VAE regions introduced - Meetings and negotiations with flight companies, tour-operators and transport carriers in selected market areas - Agreements or negotiations on new routes 	<ul style="list-style-type: none"> schedules corresponding to travellers needs - Meeting and travel reports - Signed agreements on new connections and/or routes
IV) Concept development, marketing & communication	<ul style="list-style-type: none"> - Travel packages in 10 Arctic themes - VAE companies provides services for the CBC travel packages - Step by step approach to use digital marketing - Promotion campaign planned and is taking into account the different targets and concepts 	<ul style="list-style-type: none"> - VAE travel package published and available for tour operators - Reported SME partnerships on VAE - Digital marketing solutions based on tour operators marketing plans - Agreements with tour operators
V) Project management	<ul style="list-style-type: none"> - Organisation and management structure - Practises for the regular communication among VAE partners, SMEs and other involved parties - Management and steering group meetings - Clear documentation and reporting system 	<ul style="list-style-type: none"> - VAE partnership agreements - VAE communication guidance and instructions - Internal intranet at place (Joiqu) - VAE management and regular reports in Joiqu: VAE personnel, VAE companies, working group, steering group

(VAE LogFrame Matrix.)

2.2 Northern-Scandinavia is an attractive integrated tourism destination with common vision

All the indicators of this matrix have been formed in mission 1, a study part of the research and development section in the matrix, by UNI Consortio. As seen in Table 2, the overall objectives of this project are: increased CBC (cross-border collaboration) networking and communication among tourism industry, new CBC tourism products and growth of sales, improved accessibility to and within the region, increased number of visitors and VAE II. Performance indicators to these are: VAE area is well known unified tourism destination, growth of the CBC business model among tourism industry, growth on turnover among participating SME select, 7 % growth on overnights, accessibility and VAE II. Indicators are verified with turnovers of the tourism field in VAE regions, overnight statistics and VAE II decision. The project purpose, or the concrete aim of the project is to make Northern-Scandinavia an attractive integrated tourism destination with common vision. Indicators to this are: internationally recognized Arctic destination from tour operators point of

view, increased number of overnights also on shoulder and low-seasons in selected market areas and documented increase of turnover among participating SMEs. These are verified with project's final report, project statistics and agreements with tour operators, as well as with practice to report the impacts to SME turnovers. (VAE LogFrame Matrix.)

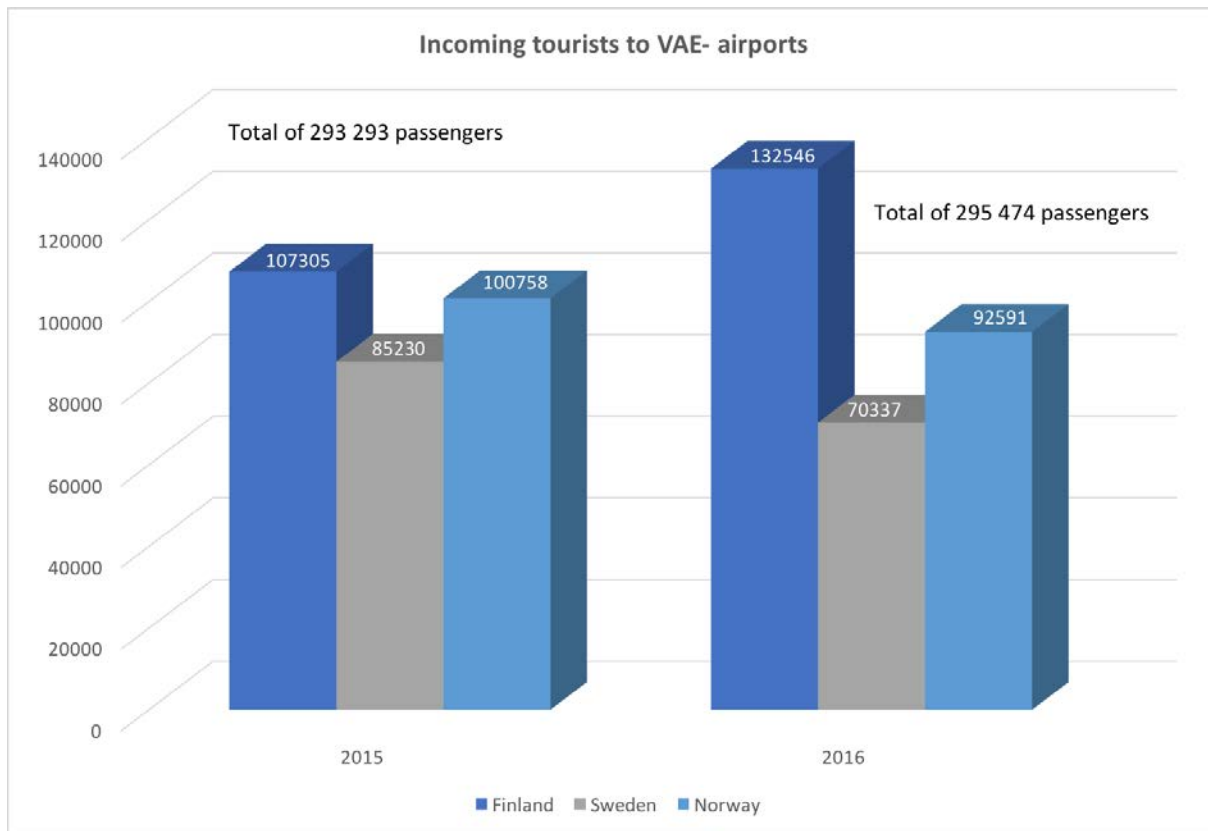
Project partners have decided to continue to VAE II. Planning is in process and its content, budget and application are almost done. The decision concerning the funding will be given in May 2018 the latest. The project personnel is working on the final report at the moment and deadline for that is at the end of the April 2018. All this information will be passed to partners with a briefing so they are able to continue the monitoring. Partners have the agreements with tour operators in their possession.

Information about Finnish Lapland and incoming international tourists was gathered from Visiittori.fi, where the access was given by the project personnel. The statistics there are formed by Tak Oy, using for example information from Statistics Finland. The service is very easy to use and the numbers concerning only airports in Finnish Lapland, per month from 2015 to 2017 were gathered from there. For Swedish Lapland statistics of Swedavia and "Transportstyrelsen" were helpful and for Northern Norway "Statistikbanken" by Statistics Norway. The arctic Europe of the VAE project covers Enontekiö, Ivalo, Kemi-Tornio, Kittilä and Rovaniemi airports in Finland, Arvidsjaur, Gällivare, Kiruna, Luleå, Skellefteå and Pajala in Sweden. Kiruna and Luleå are managed by Swedavia, and the other airports are in non-governmental ownership (Om oss; Swedavia äger och driver....). In Northern Norway, Alta, Bardufoss, Bodø, Evenes, Kirkenes, Lakselv and Tromsø airports belong to the VAE project.

2.2.1 Incoming passengers to VAE airports

The number of incoming passengers on international flights has grown during the VAE project as in 2015 total of 107 305 passengers arrived at Finnish VAE airports and in 2016 the number was 132 546. In Swedish Lapland and Northern Norway the numbers have gone down in one year. In 2015 85 230 passengers arrived at VAE airports in Sweden and in 2016 it was 15 000 passengers less. Northern Norway greeted about 100 000 passengers in 2015, but next year only a bit less than 93 000. These numbers contain arriving passengers on international scheduled and non-scheduled flights. Even Rovaniemi attracts tourists year-round, Kittilä has the biggest share of about 40 % of all arriving passengers in Finnish Lapland just with the help of winter months. In Swedish Lapland,

Luleå airport is the most popular one with its high season in the summertime. It takes over 60 % of all arriving passengers. In Northern Norway, Tromsø is the most popular one all-year-round and takes 40-50 % of all arriving international passengers yearly. (Appendix 1: Incoming tourists to VAE airports.)



Picture 1. Incoming tourists to VAE airports. Source: Incoming tourists to VAE airports (appendix 1).

In total, 293 293 passengers on international flights arrived in VAE area in 2015. In 2016 this number was 295 474 passengers, so total growth was very restrained. In Finland, the passenger figures grew 20 %, but in Sweden and Norway they came down 18 % and 9 % (Picture 1).

Finland's share of the total amount grew from 37 % to 45 %. Sweden's share cut back from 29 % to 24 % and Norway's from 34 % to 31 %. The figures of 2017 are not published yet (13.11.2017), but growth can be expected for all three countries when passengers on international flights are concerned. By October 2017, 67 774 passengers have arrived in Finnish Lapland, without Christmas season's figures. In 2016 the same number was only 43 556. (Appendix 1: Incoming tourists to VAE airports.) According to Finavia, year 2017 is going to break all records once again with a record of pre-booked Christmas charter flights. Most of these 588 pre-booked charter flights

come from the Great Britain which is one of the target markets of the VAE project. (Lapinsuursuosio jatkuu..., 2017.) Dutch tour operator Voigt Travel, one of the tour operators involved in the project, launches charter flights from Amsterdam to Kiruna Sweden in February 2018 in cooperation with the DMO Swedish Lapland. Marketing efforts of VAE project are thereby beginning to affect after three years, also in Northern Sweden. (Nytt charterflyg från..., 2017.) Same Voigt Travel launches summer charter flights to Skellefteå Sweden in triangulation with Rovaniemi Finland in June 2018 (Stor chartersatsning till..., 2017). For Sweden and Norway, the statistics are updated to September 2017. At VAE airports in Sweden, 65 019 passengers arrived by September 2017, when in 2016 it was only 57 157. Airports of Northern Norway had 91 153 passengers in 2017, but in 2016 by September the number was 72 798 passengers on international flights. (Appendix 1: Incoming tourists to VAE airports.)

The project is interested in also the nationality of the arriving passengers on international flights per month and per airport. Unfortunately Finland and Norway are not publishing this type of information. In Sweden they only publish this information by nationalities and quarters concerning Kiruna and Luleå airports managed by Swedavia. Transportstyrelsen divides passengers in to Europeans and others per month. Neither of them divides arriving and departing passengers, so these figures contains both. From Belgium to Kiruna, arrived and departed 20 passengers in January-March 2015, but in 2016 the corresponding number was 74. Year 2017 this quarter shows 30 passengers. Most passengers, from project's target markets, were from the Great Britain which arrived at and departed from Kiruna. In 2015 this meant 5833 passengers focusing on January-March and October-December quarters. Next year was better, total of 6787 passengers. The first quarter stays at the same level with the year 2015. The number of German passengers has been increased at Kiruna and Luleå airports sixfold from 51 to 294 passengers 2015-2016. Most of them arrived at and departed from Kiruna during January-March. Luleå airport has been pretty quiet when project's target markets are concerned, but 2017 is looking a bit better. In April-June quarter 117 Swiss passengers and 231 German passengers have arrived at and departed from Luleå. At the beginning of the year 180 British were recorded. (Appendix 1: Incoming tourists to VAE airports.)

In winter months of 2015 nearly 21 000 European passengers arrived at/deperted from Arvidsjaur. In 2016 growth was almost 23 % compared to last year as passenger figures show 25 738. Based on the statistics beginning of the 2017 there will be some growth as well. More Europeans arrived at/deperted from Skellefteå than Arvidsjaur, nearly 29 000 passengers and they were recorded more evenly throughout the year with a peak in the summer months. In 2016 the figures dropped and only

15 000 Europeans arrived at/departed from Skellefteå. Year 2017 is again looking better, already 21 777 European passengers by September 2017. Differently from other airports, other nationalities outside Europe arrived at/departed from Skellefteå, especially in 2015 there were 5200 passengers in the spring and autumn. The number of 2016 stayed in 600 passengers in the beginning of the summer and there is no growth expected in 2017 as by September 2017 the number is zero passengers. Pajala airport seemed to be Christmas favorite in the statistics as 3667 European passengers arrived at/departed from Pajala in 2015 and next year there were 4096 passengers. (Appendix 1: Incoming tourists to VAE airports.)

2.2.2 Overnights in VAE region

Registered overnights in Finnish Lapland by project's target markets were collected once again from Visiittori.fi: registered overnights in Lapland. The figures contain overnights in registered accommodation properties, hotels, motels, guesthouses, inns, holiday villages and camping sites. (Visiittori.fi.) For Swedish Lapland the information was gathered from Statistics Sweden and the figures were from statistics database selecting "Näringsverksamhet", "Inkvarteringsstatistik", "Månad, preliminär statistik" and "Gästnätter för samtliga hotell, stugbyar, vandrarhem, campingar, förmedlade privata stugor och lägenheter efter region och hemland. Månad 2008M01-2017M08". (Statistiska centralbyrån.) The numbers contain overnights in hotels, holiday villages, guesthouses, camping sites, private cottages and apartments. For Northern Norway, statistics bank of Statistics Norway was useful by selecting first "Transport og reiseliv", "Reiseliv" ja "Overnattningar" and then "alle overnattingsbedrifter, overnattingar, etter gjestene sitt bustadland". (Statistik sentralbyrå.)

Overnights by international tourists were registered in Finnish Lapland 1 026 788 in 2015 and the year next almost 186 000 more, 1 213 689 overnights, which means 18 % growth. Target markets formed about 46 % of the total both years. The overnights of the Austrians and the Luxembourgers have stayed about the same 2015-2016, but the overnights formed by other target markets have grown. The most grew the overnights by the Chinese, the Americans and the British tourists. The Chinese overnights grew about 50 % between 2015-2016, the American overnights nearly 40 % and the British about 24 %. The summer and autumn in Finnish Lapland interested the Chinese tourists more in 2016 as in May-October their overnights increased 87 % compared to 2015. October as a month interested the British more in 2016 than 2015, with 835 overnights more. Tourists from the Netherlands stayed in Lapland in April almost a double more in 2016 than in April 2015. The Americans got excited from the winter as in November-December 2016 nearly 150 % more

registered overnights than in winter 2015. (Appendix 2: Registered overnights by international tourists.)

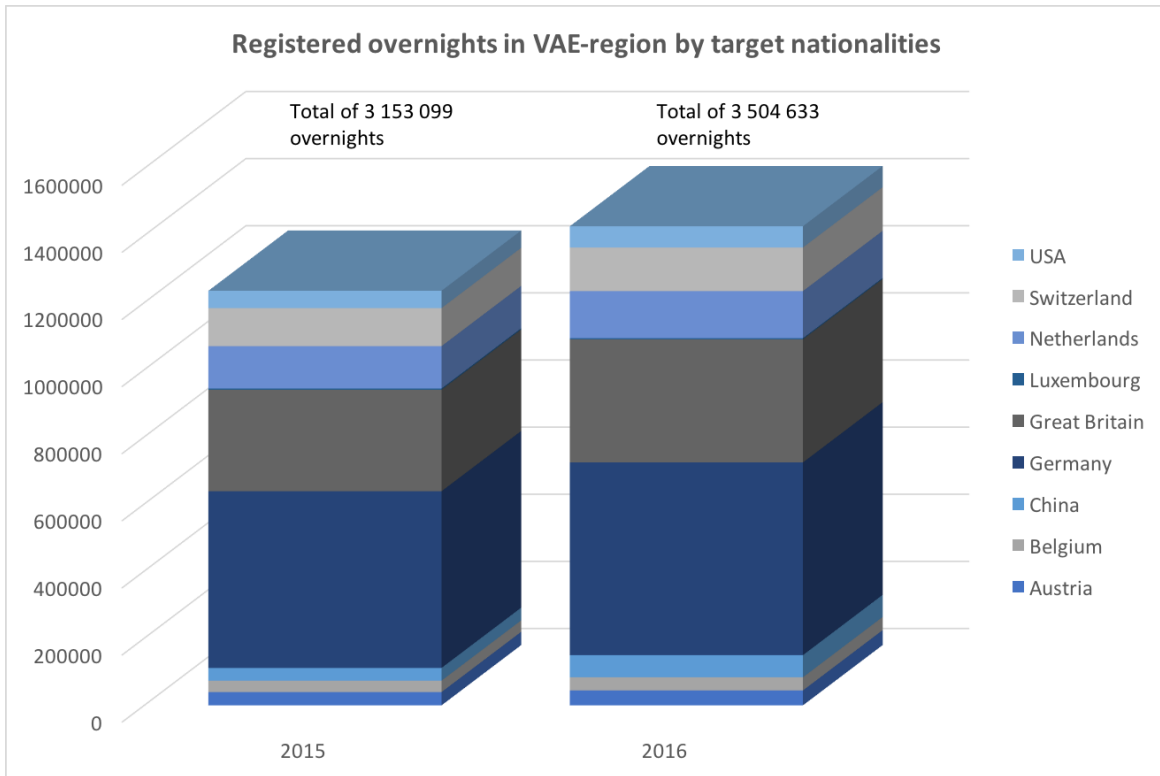
In Swedish Lapland (Norrbotten and Västerbotten) there is no similar growth in overnights as in Finland. In 2015, 1 090 510 overnights by international tourists were registered and in 2016 2 % less, 1 065 643 overnights. VAE target markets formed about 23-25 % of all overnights. Overnights by the Chinese tourists grew 33 %, the Germans 13 %, even quantitatively they were registered 18 508 overnights more than 2015. Otherwise the overnights by target markets have stayed about the same, or even went down a bit like the overnights of the Austrians, the Netherlands and the Americans. The Austrians stayed more in Västerbotten in the summer 2016 than in 2015.

Overnights of the Chinese decreased in Västerbotten in 2016 with almost a half compared to 2015, when in Norrbotten nearly 3900 overnights more were registered by the Chinese. Overnights by the German tourists were registered much more in the summer months in Västerbotten, when in Norrbotten the Germans stay evenly throughout the year. In Västerbotten the number of overnights by the Luxembourgers collapsed in 2016 compared to 2015, but the numbers grew in Norrbotten. In the summer months of May-August, overnights by the Swiss were registered 81 % more in 2016 than 2015. In Norrbotten the winter months were busier and the number of overnights in the summertime was decreasing. (Appendix 2: Registered overnights by international tourists.)

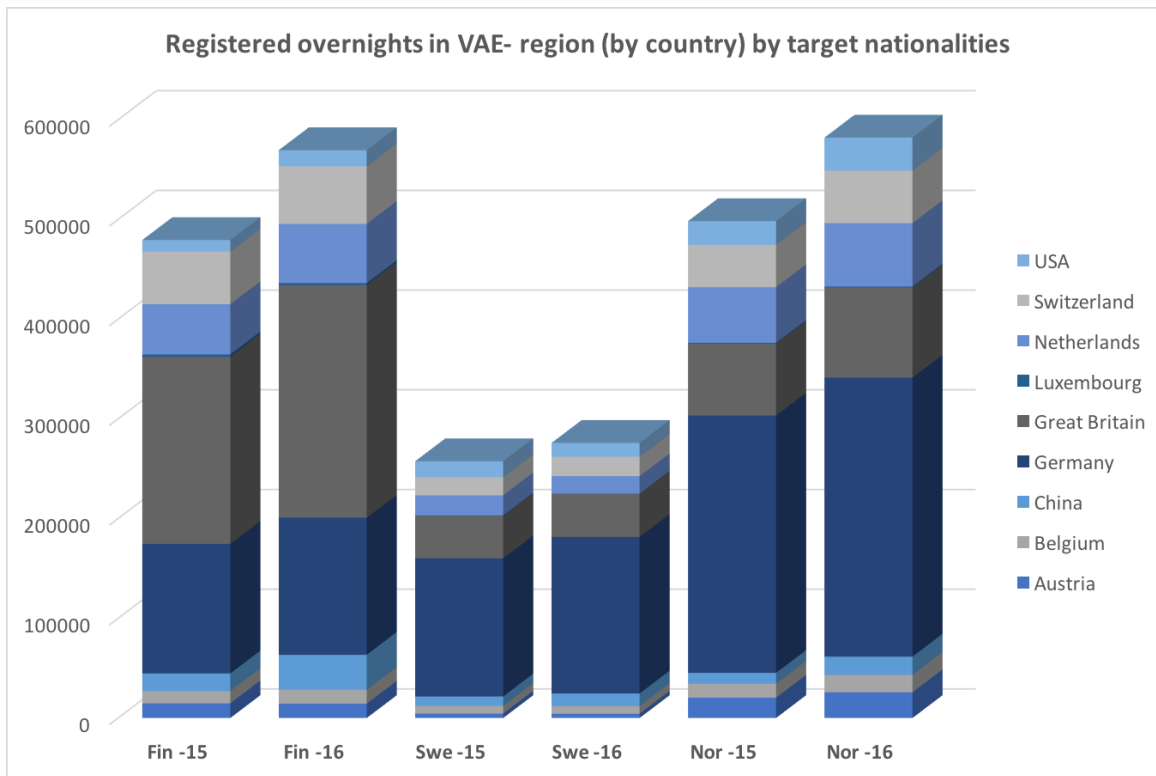
The overnights in Northern Norway by international tourists have increased 18 % in one year 2015-2016 like in Finnish Lapland. In 2015, 1 035 801 overnights were registered and in 2016 1 225 301 overnights. The target markets formed about 48 % of the total, so the biggest share of all three countries. The German overnights have been quantitatively registered the most, 21 636 overnights more in 2016 than 2015, but percentage growth was only 8 %. Instead, the overnights by the Chinese tourists have grown 68 % and the Americans by nearly 40 %. The Germans stayed the most in Nordland in 2015-2016 and the overnights were divided quite evenly throughout the year in all three counties. The British stayed the most in Troms. The Austrians, the Belgians and the Netherlands stayed the most in Northern Norway in the summertime 2015-2016, same as other nationalities. (Appendix 2: Registered overnights by international tourists.)

The registered overnights by international tourists in whole VAE area grew from 3 153 099 to 3 504 633 overnights, about 10 % from 2015-2016. Target markets formed about 39-40 % of the total (Picture 2). The overnights by the Austrian tourists grew 11 % from 2015 to 2016, the Belgians 13 %, the Chinese 43 %, the Germans 8 %, the British 18 %, the Dutch 10 %, the Swiss 13 % and the

Americans 19 %. The overnights by the tourists from the target markets grew in total of 14 %: from 1 235 294 to 1 427 520 overnights. In Picture 3 the overnights have been divided by country both years and the smaller share of the Swedish Lapland can be seen when the overnights by the tourists from the target markets are concerned. (Appendix 2: Registered overnights by international tourists.)



Picture 2. Registered overnights in VAE region by target nationalities. Source: Registered overnights by international tourists (appendix 2).



Picture 3. Registered overnights in VAE region (by country) by target nationalities. Source: Registered overnights by international tourists. (appendix 2).

The year 2017 seems very promising as well when registered overnights are concerned. By 13th of November 2017 the statistics have been updated until August 2017. In Finnish Lapland, the overnights by international tourists have already in August 2017 reached the level of overnights worth the whole year 2012, which means about 955 000 registered overnights. In August 2016, this figure was 753 291 and in 2015 666 411. The “collapse” of Swedish Lapland seems to be temporary as by August 2017, the number of August 2015 have been broken so there will be growth in overnights. In August 2017, they registered in Northern Sweden 971 740 overnights, in 2016 the number was 918 799 and 2015 it was 929 140 overnights by international tourists. In Northern Norway the overnights are growing steadily towards the end of the year 2017. By August 2017 they have registered already 1 136 720 overnights by international tourists, in 2016 the figure was 1 035 846 and 2015 it was 888 193. Overnights by the Chinese tourists have grown remarkably as in Finland: by August 2017 23 141 overnights registered, when it was 18 308 at the end of the year 2016 and in 2015 10 873. (Appendix 2: Registered overnights by international tourists.)

2.2.3 The average daily consumption

The average daily consumption by tourists has not been researched in just Finnish Lapland or Northern Norway at all. Visit Finland has done Visitor Survey 2016 which concerns whole Finland. According to the survey foreign tourists spent daily 60 euros on average in 2015. From the project's target markets, the Chinese spent the most, 143 euros daily. The Americans spent 74 euros, the British 62 euros, the Germans 45 euros, the Dutch 66 euros, the Belgians 63 euros and the Swiss 75 euros. The average consumption grew in 2016 to 69 euros. The Chinese spent 152 euros, the Americans 80 euros, the British 78 euros, the Germans 54 euros, the Dutch 71 euros, the Belgians considerably less, 54 euros and the Swiss 98 euros. (Visit Finland Visitor Survey 2016, p. 33.)

Table 3. Average daily consumption

Tourists average daily consumption in Finland	2015 €	2016 €	Tourists average daily consumption in Norway	2015 NOK	2016 NOK
American	74	80	American	3220	3630
Belgian	63	54	Belgian		
British	62	78	British	2510	2505
Chinese	143	152	Chinese		3275
Dutch	66	71	Dutch	921	1260
German	45	54	German	1500	1720
Swiss	75	98	Swiss	1905	2195

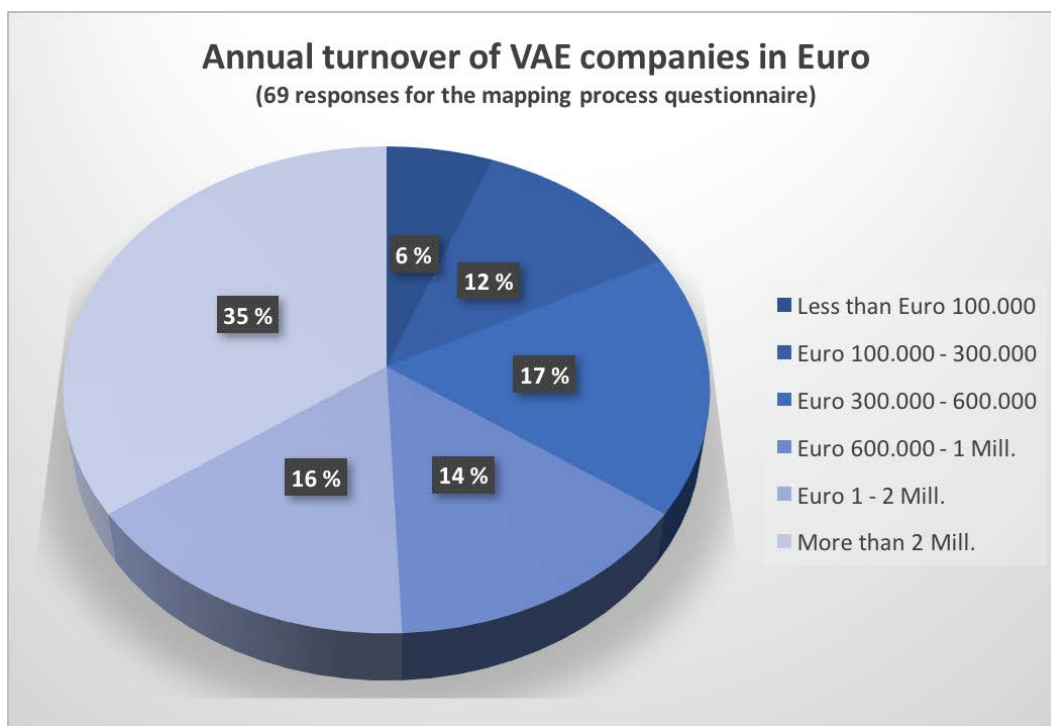
(The 2015 Tourism Survey, p. 29; The 2016 Tourism Survey, p. 41; Visit Finland Visitor Survey 2016, p. 33.)

Innovation Norway estimated that foreign tourist spent in Norway 1855 crowns (NOK) on average daily in 2015. The Germans spent 1500 crowns, the Dutch 921 crowns, the British 2510 crowns, the Americans 3220 crowns and the Swiss 1905 crowns. (The 2015 Tourism Survey, p. 29.) In 2016, they estimated it to be 2240 crowns. The Germans spent 1720 crowns, the Dutch 1260 crowns, the British 2505 crowns, the Americans 3630 crowns, the Swiss 2195 crowns and the Chinese 3275 crowns. The estimated figures concern tourists on holiday who stay one or more nights in commercial accommodation and/or on Hurtigruten. (The 2016 Tourism Survey, p. 41.) The daily consumptions in Finland and Norway are presented in Table 3. In Swedish Lapland, the average

consumption is estimated to be around 1300 crowns daily per tourist. As the figures are inadequate, they are not compared nor analyzed more in this report.

2.2.4 Tour operator sales and turnovers

For now, the sales figures are published for summer 2016, winter 2016-2017 and summer 2017 by the tour operators in this project. The new travel packages created within the project had goals for summer 2016 with 8419 tourists and for winter 2016-2017 with 20 545 tourists. Reported figures in travel packages marketed in cooperation were 8485 tourists for the summer 2016 and 21 079 tourists for the winter 2016-2017. Both goals were therefore reached. For the summer 2017 12 339 tourists were documented. Tour operators registered 86 848 overnights in the summer 2016 within the travel packages and 130 974 overnights in the winter 2016-2017. The summer 2017 had 124 402 overnights. All sales figures are not public but according to the project director VAE project in cooperation with the tour operators has generated a customer flow which is around 40 % of the total growth in the overnights in VAE area between winters 2015-2016 and 2016-2017.



Picture 4. Annual turnovers of the VAE companies in Euro.

Picture 4 is representing the results of the mapping process questionnaire from the VAE companies regarding their annual turnovers. So far there are no new numbers but a new questionnaire will be sent in connection with VAE II, which is not going to be fully comparable but it will generate new

knowledge about the possible change in turnovers. Half of all the respondents have over one million annual turnover or more. Otherwise turnovers in the field of tourism are not published very comprehensively nor precisely in certain areas by certain industries. Some estimates regarding Finnish Lapland by Statistics Finland seem quite positive: accommodation and restaurant industry from 350 million euros in 2015 to 387 million euros in 2016 and travel services which contains transport services from 280 million euros in 2015 to 306 million euros in 2016 (Lapin suhdannekatsaus 2016; Lapin suhdannekatsaus 2017). Because of the inadequate numbers, indicators are verified instead of turnovers with volume and overnights.

So, the indicators of the project purpose, Northern-Scandinavia is an attractive integrated tourism destination with common vision, are: internationally recognized arctic destination from tour operators point of view, increased number of overnights also on shoulder and low-seasons in selected market areas and documented increase of turnover among participating SMEs (VAE Log Frame Matrix). The goals of the tour operator sales were reached, at least for the first winter and summer so the development seems quite positive. The overnights by international tourists grew 10 % in VAE area and the overnights by the target markets grew 14 % in one year (Appendix 2: Registered overnights by international tourists). The total growth of the arriving international passengers was very low as the airports in Finnish Lapland raised and the airports in Swedish Lapland and Northern Norway decreased the percentage total change. Year 2017 seems better though for every country involved. (Appendix 1: Incoming tourists to VAE airports.) The possible evaluation and comparison of the turnovers in the tourism field is postponed to VAE II.

2.3 Functional networking and cooperation

The intended results/outcomes of the project have been divided to five categories: functional networking and cooperation, R&D activities (research and development), improved accessibility, concept development, marketing and communication and project management. The performance indicators for the functional networking and cooperation are: CBC interactions between VAE actors, CBC benchmarking, scheme for the VAE CBC workshops and meetings, common understanding of VAE competitiveness advantages and tour operators reference group participation. These are verified with VAE result reporting which includes documentation on VAE peer-learning visits, ideas for VAE CBC products families and themes and reference group feedback. (VAE LogFrame Matrix.)

The schedule for meetings and networking looks like this: all peer-learning visits, reference group meetings and networking events.

- Kick Off Days 18.-19.11.2015 Tromsø
- Company meeting 4.-5.4.2016 Levi
- Cluster 1 meeting in 15.-16.8. 2016 Saariselkä
- Cluster 2 meeting 17.-18.8. 2016 Kukkolaforseen
- Cluster 3 meeting 24.-25.8. 2016 Ylläs
- Cluster 5 meeting 5.-6.9. 2016 Luleå
- Cluster Accessibility meeting 13.-14.9. 2016 Kiruna
- Company meeting 21-23.9. 2016 Kiruna
- Cluster meetings 2.-5.10. 2016 Tromsø
- Sales Workshop 6.-8.6. 2017 Luleå
- Final Seminar 21.-23.11.2017 Rovaniemi

Five VAE peer-learning visits have been documented, in Saariselkä Finland, Kukkolaforseen Sweden, Ylläs Finland, Tromsø Norway and in Luleå Sweden. Reference groups were collected from tour operators and cluster meetings were about dividing the VAE companies in smaller groups so cross-border cooperation would develop and it would be easier to build the trust. In Saariselkä there was discussion about the safety, accessibility and seasonal change, when in Sweden they focused more to the product development. In Ylläs the conversation developed from company presentation to the issue of low seasons and of course, accessibility as in other meetings. In Luleå there was discussion about accessibility and low seasons once again, the main challenges of the area. The rapports of the meetings can be found in Joiqu where everyone involved in the project has access to. (Cluster meetings, Joiqu.)

Feedback has been collected from reference group meetings and sales workshops as stated in the logframe matrix. Tour operators have been attending all events. 10 arctic themes by VAE are: Arctic Feelgood, Arctic Hop on Hop off, Arctic Light, Arctic Lifestyle, Arctic Adventure, Arctic Nature, Arctic Culture, Arctic Silence, Arctic Food and Arctic Active. These themes were formed and developed by a questionnaire, project personnel and working group together. They are the basis of the cross-border travel packages. (Arctic Themes, Joiqu.)

2.4 R&D activities

The indicators of this sector are: R&D activities outsourced, monitoring and evaluation guidance, tourism trend study, mapping the CBC obstacles and customer mobile behavior. They are verified with tender documentation, project reporting delivered products by the R&D provider which are: VAE logical framework approach as our method and monitoring and evaluation guideline for self-monitoring, the trend study, the report on mapped obstacles and the mobile behavior study report. (VAE LogFrame Matrix.) R&D activities have been carried out and the results have been dealt to VAE partners and companies.

The tourism trend study was published in August 2016 as "Disoriented Travellers or Disoriented Destinations? – An analysis of future travel trend studies for Visit Arctic Europe project". The research was carried out by Specialist Kyyrä from Ministry of Economic Affairs and Employment and Associate Professor Rantala from Multidimensional Tourism Institute MTI and the University of Lapland. In this study they analyzed future trends from the project's perspective. The themes for the future trends are: disoriented travellers, responsible wellness, mobile, sharable living and sharing economy. (Kyyrä, Posio, Rahikainen, Rantala, 2016, p. 2, 3 ja 14.) The analysis of digital tourism was made by Researcher Gelter from Luleå University of Technology. It was published in May 2017 as "Digital tourism - An analysis of digital trends in tourism and customer digital mobile behaviour for the Visit Arctic Europe project". In this research Gelter studied current and future digital travel trends which might affect the tourism in the VAE area. (Björk, Gelter & Posio, 2017, p. 2.)

The research concerning CBC was published in April 2017 as "Cross-border cooperation - An analysis of challenges and obstacles for cross-border cooperation in the Visit Arctic Europe area". It was written by Professor Heimtum from the Arctic University of Norway UiT, University Lecturer García-Rosell from University of Lapland and Researcher Gelter from Luleå University of Technology. One of the project goals is to develop VAE area to a well-known, unified and high-quality tourism destination which is internationally recognized and manages to compete with other similar destinations. The goal of this research was to analyze the challenges and obstacles of the successful development of VAE cross-border packages. They interviewed service providers like transportation companies, international tour operators and tourists as well.

2.5 Improved accessibility

Improved accessibility is measured with Accessibility Toolkit demonstrating destination potential for transport carriers and other actors in the VAE region. Other indicators are: VAE internal travel-chain model in the VAE regions introduced, meetings and negotiations with flight companies, tour operators and transport carriers in selected market areas and agreements or negotiations on new routes. Published toolkit is delivered to stakeholders, as free access electronic version. Other sources of verification are: VAE map of inter destination transport connections and schedules corresponding to traveler's needs, meeting and travel reports as well as signed agreements on new connections and/or routes. (VAE LogFrame Matrix.) The Accessibility Toolkit has been delivered to the project partners and companies, as well as the VAE map. Meeting and travel reports are documented and covered in the final VAE report. Signed agreements are now part of the VAE II plan, the project acting like the author of the initiative.

2.6 Concept development, marketing & communication

Indicators for these intended outcomes are: travel packages in 10 arctic themes, VAE companies provides services for the CBC travel packages, step by step approach to use digital marketing, promotion campaign planned and is taking into account the different targets and concepts. These are verified with: published VAE travel package and available for tour operators, reported SME partnerships, digital marketing solutions based on tour operators marketing plans and agreements with tour operators. (VAE LogFrame Matrix.)

By 13th of November 2017 tour operators have created 267 new travel packages and 78 of them are cross-border packages. Partnerships has been formed but not reported. Using VAE companies has been a precondition in the tour operator agreements and they have covered whole VAE area in their product range. Tour operators have used 15-60 VAE companies in their packages depending on the tour operator. For digital marketing solutions, two researches in R&D activities –section have been carried out. The first one was already mentioned: "Digital tourism – An analysis of digital trends in tourism and customer digital mobile behavior" by Researcher Gelter.

The other one is by WSP and it is a comprehensive statement about customer experience in the VAE area which includes benchmarking of digital solutions and information platforms: an analysis,

comparison, recommendations, relevant tools and trends both for the tourism industry and the VAE project as well as the relevant benchmarking of information platforms of the project's perspective. It contains also suggestions for digital information and transaction platform and specifications for destination data from digital perspective. Destinations data means in this case all the information customer can look for with the help of the platform. Finally, the study presents an introduction of an outline of tourism and accessibility platform for the VAE project and recommendations for quick fixes and pilots as well as represents understanding of behavior design approach to travel chains and concepts for improving customer experience in travel chains. Otherwise joint digital marketing solutions have been a bit tricky subject in this project as not all service operators have their own web shop. It has required and it will require tight cooperation with tour operators and we will see in the future where do that lead. It is still an on-going process. 12 joint marketing contracts have been signed between project partners and tour operators which define key concepts, campaign requirements and the project's requirements for the cooperation.

2.7 Project management

Project management performance is measured with: organization and management structure, practices for the regular communication among VAE partners, SMEs and other involved parties, management and steering group meetings and clear documentation and reporting system. These are verified with: VAE partnership agreements, VAE communication guidance and instructions, internal intranet Joiqu and VAE management and regular reports in Joiqu for VAE personnel, VAE companies, working and steering group. (VAE LogFrame Matrix.)

Partnership agreements have been signed between all three project partners and project director. The agreements include for example details about the responsibilities and key actions, budget, usage of the money and publicity. What comes to VAE communication guidance and instructions, the completion has been decided to move to VAE II. An external evaluation of the project has been made and reported by Oxford research. They evaluated the organization and project management, expediency, performance of the project, efficiency and effectiveness regionally, nationally and internationally. The project got really high marks of the evaluation. Joiqu is the project's intranet, offering different information for different stakeholders. For companies Joiqu offers newsletters, R&D reports, accessibility reports and information about cluster and networking meetings.

For the personnel, it holds team meeting documents in addition to the above. Working group and steering group have access to meeting documents, all the material regarding tour operators, R&D and accessibility. Accessibility team can get all material they need for their work.

3. The success of Visit Arctic Europe

So, what did Visit Arctic Europe accomplish, for now? First of all, it will likely to lead to phase two called VAE II. In phase two it is possible to finalize the unfinished and grab new challenges already known or picked up from the feedback collected. For example, turnovers in the tourism field and the comparison of those, as well as making a practice out of reporting turnovers will be tackled in VAE II. Signed agreements concerning new routes/connections are also part of VAE II plan. The completion of VAE communication guidance and instructions will be finalized later in the project, in phase two.

Both partnership agreements and 12 joint marketing agreements were signed and tour operator sales targets were reached, at least for the first summer and winter. Visit Arctic Europe and tour operators created 267 new travel packages which 78 of them are cross-border packages. Tour operators use 15-60 VAE companies in their packages depending on the TO. Meetings and events were organized according to the schedule and feedback was collected and documented. All research and development activities have been carried out and the results have been dealt as agreed, as well as the Accessibility Toolkit and the VAE map. Intranet Joiqu has been established and in use for passing all the information to the different stakeholders.

What comes to tourism figures and statistics, in one year 2015-2016, 20 % more international passengers arrived at the airports of Finnish Lapland. Overnights by international tourists were registered 10 % more in the whole VAE region. Registered overnights by the tourists from the target markets grew 14 %. Year 2017 is looking very good for all three VAE countries. The project was evaluated externally by Oxford research and performed really well. VAE won also in Arctic Award 2017 first place in category 1; Overcoming the critical mass (Arctic Award 2017).

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