JOIN THE PRESERVOLUTION!

A sustainable tourism development strategy for the Faroe Islands towards 2025
A preservolution is a new perspective on tourism and it is something we need to talk about. We need to talk about it because tourism affects every one of the 50,000 inhabitants that call our 18 North Atlantic islands their home. The joint sum of our nature, our distinct culture and our people is our most vital resource. It is our responsibility to preserve this resource; for us, our visitors and for future generations.

We also have a desire and responsibility to welcome visitors to experience our beautiful islands and distinct culture, and to help our tourism industry grow in a sustainable and responsible manner.

In other words, we wish to preserve by evolving. The key to the preservation of our nature and culture, and to the prosperity of our tourism industry, lies in moving forward in the right direction. This strategy is a framework for how we should go about achieving that goal together, for the benefit of the people of the Faroe Islands and our visitors.

More than just a strategy, we see this as a bigger idea: a tourism preservolution. It is an evolution and a solution, with preservation at its core. An entirely new way of thinking about tourism. We consider it the most important task for us as a destination and country in the years to come.

This is our opportunity to shape a prosperous and sustainable tourism industry from the get-go. That is our utmost responsibility and we need to start now.

This strategy is our call for you to join the preservolution.
CONTENTS

JOIN THE PRESERVOLUTION! 2

ABOUT THE TOURISM DEVELOPMENT STRATEGY 6

THE 4 CORNERSTONES TOWARDS 2025 14
#1 Quality over quantity 18
#2 Tourism for all of the Faroe Islands, all year round 24
#3 Knowledge and professionalisation 30
#4 A common legislative framework 36

THREE MARKS OF SUCCESS FOR 2025 42
About the tourism development strategy 2025
The strategy’s main objectives included generating DKK 1 billion in tourism-related revenue, securing 200,000 bed nights and employing 1,000 full-time equivalents in the Faroe Islands by 2020. With an average annual growth in tourism of around 10% since then, this mark of success is already within reach.

With this in mind, it is time to set our sights on a future beyond 2020. Within the last few years, the Faroe Islands has developed from being small dots in the North Atlantic with little global awareness to a destination on the bucket list of travellers from all over the world. Political prioritisation, successful destination marketing, increased accessibility to the country, a general growth in tourism worldwide and increased interest and demand for Nordic destinations have all played a part in putting the Faroe Islands on the global map.

Tourism in the Faroe Islands is doing well. Getting to and from the islands is now easier and cheaper. Restaurants, hotels and experience-based tourism products have sprung up across the country. Faroese society has become more diverse and vibrant, and tourism has influenced the lives of many in a positive way. The industry is optimistic, and tourism is expected to continue its growth and eventually become a significant new economic engine for the Faroe Islands.

In 2013, Visit Faroe Islands launched a new tourism strategy. Its aim was to turn tourism into a key industry in the Faroese economy; an industry that developed sustainably, with consideration for the people, environment and economy. This continues to be our vision today.

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With this growth comes the responsibility to preserve our fragile nature and strengthen our distinctive culture. While the economic benefits of tourism are desirable and a goal in itself, tourism is not solely about numbers; it is also about adding non-material value to a society and its people, and about ensuring that our country continues to develop as an interesting place to live, both for those already here and for those living abroad who are considering to move home. Growth is only a good thing if it happens sustainably, with the unique nature and culture of the islands, and the needs of the Faroese people, as its principal beneficiaries. Instead of trying to halt an inevitable development, tourism should be used as a tool to create a better society for all Faroe Islanders.

We need to recognise that to stay the same sometimes requires the need to move forward. This recognition is very much at the heart of the new task ahead for Visit Faroe Islands and the rest of the industry: a Faroese preservation that works to develop tourism in order to preserve our country and to continue to live up to our promise of being unspoiled, unexplored and unbelievable, as defined in the Visit Faroe Islands brand.

We recognise that this is a challenging task. Tough choices lie ahead if we wish to shape and maintain a sustainable tourism development that does not push our nature and environment past their limits. If we are to succeed, we need to get businesses, authorities and locals to help turn our preservation from an idea into a movement.

At Visit Faroe Islands, we commit to being the frontrunners of this movement and to being a leading voice, not only in the marketing and branding of our destination, but also in managing it responsibly.

We commit to continue to develop our tourism industry and to recognise the unique opportunity we have of shaping an entire industry with the needs, desires and lifestyle of the Faroese people as its focal point. An industry with low entry barriers, stationary jobs and revenue streams that flow back into Faroese society.

But we also insist on moving beyond talking about tourism as merely an opportunity. We need to talk about it as a responsibility that stretches further and wider than just the industry and something we hope that everyone, together with us, will live up to.
Visit Faroe Islands gathers tourism statistics annually. At the time of writing, the newest tourism revenue statistics are from 2016. We also conduct surveys that provide information about visitors’ behaviour, opinions and satisfaction with their visit.

### Total number of bednights (excluding Airbnb)

<table>
<thead>
<tr>
<th>Year</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
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<tbody>
<tr>
<td>Value</td>
<td>132,265</td>
<td>139,250</td>
<td>159,167</td>
<td>159,759</td>
<td>174,809</td>
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Source: Hagstova Føroya

### Tourism revenue (in DKK million)

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<tbody>
<tr>
<td>Value</td>
<td>384</td>
<td>421</td>
<td>460</td>
<td>523</td>
<td>588</td>
<td>606</td>
</tr>
</tbody>
</table>

Source: Hagstova Føroya

### How satisfied are you with your visit to the Faroe Islands?

1 = Very unsatisfied
2 = Unsatisfied
3 = Neutral
4 = Satisfied
5 = Very satisfied

- **How satisfied are you with your visit to the Faroe Islands?**
- **How much do you agree with the statement that the Faroe Islands is “unspoiled, unexplored, unbelievable”, as defined by tourists in 2012-13?**

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</thead>
<tbody>
<tr>
<td>Value</td>
<td>19,9%</td>
<td>21,2%</td>
<td>17,0%</td>
<td>12,0%</td>
<td>9,6%</td>
<td>12,0%</td>
</tr>
</tbody>
</table>

Source: Gallup survey, August 2018, 483 tourists questioned after visit to Faroe Islands

Visit Faroe Islands’ brand, “unspoiled, unexplored, unbelievable”, is based on feedback from tourists.

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Visit Faroe Islands’ brand, “unspoiled, unexplored, unbelievable”, is based on feedback from tourists.
Four cornerstones leading to 2025

CORNERSTONE #1
Quality over quantity

CORNERSTONE #2
Tourism for all of the Faroe Islands, all year round

CORNERSTONE #3
Knowledge and professionalisation

CORNERSTONE #4
A common legislative framework
Methodology

To ensure a long-lasting, consistent strategic approach towards 2025, and to ensure we make the right decisions with the Faroese nature and inhabitants in mind, we have formulated four strategic cornerstones that will serve as a set of guiding principles moving forward. These cornerstones will enable us to develop a prosperous and sustainable tourism industry in the years to come.

We recognise that it is neither feasible nor desirable to set a strict and unwavering course for the next seven years, as too many potential game-changers and disruptions can come in the way. Therefore, the four cornerstones are accompanied by annual action plans that lay out concrete initiatives and projects from year to year.

The four cornerstones are formulated with the UN’s 17 sustainable development goals in mind.

We have particularly focused on goals 8.5–8.9, 11.3–11.a, 12.6–12.b

METHODOLOGY: This tourism strategy is based on an extensive body of research, preparation and background knowledge, including but not limited to:

/ Three focus group sessions
/ Three qualitative surveys with a total of 1,396 respondents
/ Workshops with the Faroese tourist information centres
/ A number of in-house meetings, workshops and lectures
/ A study trip to Iceland
/ About 100 meetings with 200+ individuals from businesses, organisations and public institutions
/ Review of other countries’ tourism strategies and development plans
/ Current and past visitor surveys, annual economic key figures, annual reports and surveys among the Faroese population
Quality over quantity
We strongly believe that the Faroe Islands has room for more visitors interested in discovering our breath-taking nature, interacting with the Faroese people and experiencing our growing array of authentic tourism products. But we also recognise that the Faroe Islands is not a destination for everyone. An increasing number of visitors only makes sense if we manage to get more value from each visitor and to attract the right type, all year round. This will ensure a more sustainable and responsible growth, where tourism pays better dividends to society. A solution is to put emphasis on quality-conscious tourists that wish to interact with locals and take part in authentic tourism experiences, and who are willing to pay for these services.

The 2025 vision

In 2025, the Faroe Islands is even more connected to the world and tourism on the islands has increased. Locals and visitors alike experience a sustainable destination that continues to live up to its core brand promise. With preservingolution as our guiding principle, we have succeeded in attracting visitors from a broad spectrum across geography, segments and interests that feel a sense of community with the uniqueness of the Faroe Islands. When measuring success, we look more at tourism’s overall contribution to society than the volume of guests we have, underlining our focus on quality. The Faroe Islands, being a small island community, has a limited carrying capacity. Underlining our focus on quality over quantity, we have put a limit on the size of cruise-ships allowed ashore in the Faroe Islands in 2025. Instead, we have managed to achieve a more value-based partnership with the cruise industry, meaning smaller ships, longer stays and a bigger economic contribution to society.

Visit Faroe Islands has evolved into a leading destination management organisation that successfully integrates destination marketing and destination management. Our marketing efforts have evolved from only creating awareness and cultivating demand to also increasing focus on removing barriers on the path to purchase, longer stays, repeat visitors and shoulder seasons. An increasing emphasis on MICE-related tourism is an important part of this work. These initiatives have helped us attract visitors best suited to the Faroe Islands as a travel destination and country.
Key initiatives towards 2025

/ We will formulate a joint manifesto for sustainable tourism development with as many industry co-signatories as possible. The manifesto will serve as a tool for creating industry-wide consensus, clarity and visibility around sustainable tourism development with quality experiences and products grounded in a common vision of the uniqueness of the Faroe Islands.

/ We will actively work to define a limit on the size of cruise-ships allowed into the Faroe Islands and to find the right balance between the number of port calls, visitor segmentation and cruise liners, and stronger value propositions.

/ We will work to promote quality products and experiences across the Faroe Islands through support funds, guidance and advice. All projects that Visit Faroe Islands supports will be quality-assured, based on the principles of sustainability and the specific Faroese DNA.

/ We will formulate a strategy for developing and implementing certification programmes for parts of the Faroese tourism industry to ensure consistently high quality and competitiveness in relation to foreign entities.

/ We will launch new marketing initiatives that – to a greater degree – take destination development into consideration. There will be a shift in marketing approaches, reflecting Visit Faroe Islands’ overall organisational evolution from destination marketing organisation to destination management organisation. Marketing initiatives will focus – to a higher degree – on repeat visitors, longer stays, MICE visitors and stretching tourism to all seasons.

/ Working with key players within business promotion and entrepreneurship, we will establish a network of businesses whose purpose is to facilitate development of new, quality tourism products. Our role will be to inspire and advise businesses looking to expand or get started within tourism.

MICE visitors

Spend three times as much per day compared to leisure tourists (DKK3,300 per day, according to Visit Denmark statistics, 2018)

Travel during shoulder seasons

Contribute with knowledge and networks

CORNERSTONE

#1

KEY PARTNERS:
The Faroese Government, municipalities, Atlantic Airways, Smyril Line, SAS, Víkerkstarrů (incubator), Vinnuframi (incubator), incoming agencies, bus & taxi companies and the restaurant, hotel and retail industries.

23
Tourism for all of the Faroe Islands, all year round
Despite the relatively small size of tourist numbers in the Faroe Islands, the greatest congestion of people is in Tórshavn, the capital, which serves as a natural base for many visitors because of its concentration of hotels and restaurants. However, a new tendency has emerged in recent years, where outlying areas and small islands receive an increased share of a growing industry. Our solution is to support this trend with a dual purpose: to enable as many Faroese in as many different locations as possible to benefit from tourism all year round, and to prevent future visitor pressure points in certain locations. This will be accomplished through development initiatives as well as marketing initiatives, including a focus on the MICE segment which means an increase in visitors during shoulder seasons. A stable income from tourism all year ensures job stability across the country and strengthens the industry’s economic durability.

Internal collaboration among industry players around a common preservation purpose is the only viable way forward for a small destination with global outreach. A team effort will ensure the distribution of information to visitors, both onsite and online, with the intention of spreading visitors across locations and seasons.

The 2025 vision

In 2025, visitors to the Faroe Islands have more and better opportunities to explore the islands seamlessly, aided by accurate information, a functioning tourism infrastructure and public transport as a real alternative to cars.

At the heart of this success lies a new structure within tourism that focuses on a clear distribution of roles and tasks across regions, municipalities and information providers. With a closer coordination and new, regional networks, we have managed to create a more organised and better-coordinated destination, where regions collaborate and differentiate what they have to offer in relation to one another.

Visit Faroe Islands has a crucial role as national facilitator and coordinator and is instrumental in establishing and developing regional tourism networks and forums that serve as engines for localised tourism development.

Which part of the country did you stay in?

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tórshavn or Suðuroy</td>
<td>17.6%</td>
</tr>
<tr>
<td>Norðoy</td>
<td>11.3%</td>
</tr>
<tr>
<td>Nólsoy</td>
<td>4.4%</td>
</tr>
<tr>
<td>Vágur, Mykines</td>
<td>28.2%</td>
</tr>
<tr>
<td>Eysturoy</td>
<td>24.6%</td>
</tr>
<tr>
<td>Norðoyggjar</td>
<td>19.5%</td>
</tr>
<tr>
<td>Sandoy, Hestur, Koltur</td>
<td>2.1%</td>
</tr>
</tbody>
</table>

Source: Gallup survey, August 2018, 483 tourists questioned after visit to Faroe Islands.
Key initiatives towards 2025

/ We will take part in strengthening local tourist information centres, focusing on digitalisation, improved mutual coordination and distribution of roles, and establishing new networks and forums for collaboration. A part of this process will be developing a new and more flexible organisation within the tourism industry, together with municipalities and tourist information centres.

/ Working with relevant municipalities in an ongoing process, we will optimise and develop the tourism infrastructure in select locations already at risk of visitor pressure during the high season.

/ We will ensure better wayfinding by developing a new master concept for signage that aims to convey effective and coherent information. We will also put greater emphasis on ensuring all visitors receive information about how to behave as a tourist in the Faroe Islands, especially when travelling in nature.

/ We will optimise infrastructure in the fells by mapping existing road and path networks to ensure an organised and smooth flow of traffic.

/ Working with municipalities, we will formulate plans to support regional tourism development across the country, particularly focusing on outlying areas and smaller islands.

/ We will establish a collaborative forum for infrastructure and transport along with Strandfaraskip Landsins (Public Transport Company) and Landsverk (Public Infrastructure Company), ensuring that Faroese infrastructure is well prepared for a growing tourism.

/ Through marketing, we will spread visitors across the Faroe Islands by formulating a visual concept that communicates differences between various islands and regions, their hallmarks and what they have to offer. This information will also be found on Visit Faroe Islands’ new event and tour calendar, www.whatson.fo.

Key partners:
The Faroese Government, municipalities, tourist information centres, landowners. The Environment Agency, Association for Outlying Islands, Landsverk (Public Infrastructure Company), SSL (Public Transport Company)

Which islands did you visit?

<table>
<thead>
<tr>
<th>Island</th>
<th>% Visited</th>
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<tbody>
<tr>
<td>Fugloy</td>
<td>9.4%</td>
</tr>
<tr>
<td>Suðuroy</td>
<td>8.1%</td>
</tr>
<tr>
<td>Viðoy</td>
<td>15.5%</td>
</tr>
<tr>
<td>Borðoy</td>
<td>24.4%</td>
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<tr>
<td>Kunoy</td>
<td>24.4%</td>
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<tr>
<td>Kalsoy</td>
<td>22.2%</td>
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<tr>
<td>Streymoy</td>
<td>50.3%</td>
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<tr>
<td>Nólsoy</td>
<td>17.0%</td>
</tr>
<tr>
<td>Mykines</td>
<td>17.7%</td>
</tr>
<tr>
<td>Kollur</td>
<td>1.7%</td>
</tr>
<tr>
<td>Hestur</td>
<td>2.3%</td>
</tr>
<tr>
<td>Sandoy</td>
<td>12.0%</td>
</tr>
<tr>
<td>Skúvoy</td>
<td>2.3%</td>
</tr>
<tr>
<td>Stóra Dímun og Lítla Dímun</td>
<td>0%</td>
</tr>
<tr>
<td>Streymoy</td>
<td>14.4%</td>
</tr>
</tbody>
</table>

Source: Gallup survey, August 2018, 483 tourists questioned after visit to Faroe Islands

A stable income from tourism all year ensures job stability across the country and strengthens the industry’s economic durability.

/ We will formulate plans to support regional tourism development across the country, particularly focusing on outlying areas and smaller islands.

/ Through marketing, we will spread visitors across the Faroe Islands by formulating a visual concept that communicates differences between various islands and regions, their hallmarks and what they have to offer. This information will also be found on Visit Faroe Islands’ new event and tour calendar, www.whatson.fo.
Knowledge and professionalisation
A solid foundation of knowledge is a prerequisite for continued tourism development in the Faroe Islands that aims to follow the principles associated with a preservolution. Better knowledge about our guest’s behaviour, our destination and our own services and products will prepare Faroese tourism operators for their role as hosts, and will ensure that they remain competitive in relation to international brands and businesses. Knowledge is integral in ensuring that we find the right solutions to shape a more sustainable tourism. Moreover, the professionalisation of the tourism industry is imperative in upholding a high standard of quality tourism products. In 2025, the Faroe Islands is far better at welcoming and accommodating visitors willing to pay for quality products and experiences across the entire sector. It is also easier than ever for local businesses to benefit from tourism, regardless of location. We have succeeded in this field because we have managed to cultivate a far more professional tourism industry through competence development, knowledge sharing and education, thereby creating a fertile breeding ground for increased tourism revenue, higher interest from investors and a more sustainable economy. Furthermore, we now possess more precise knowledge about the number of visitors, types of visitors and accommodation visitors use, revenue (private and public) and the digital behaviour of our guests, all of which can be used to adapt our strategy and products.
Key initiatives towards 2025

/ We will calculate the economic impact of tourism in the Faroe Islands using better key figures, including the estimated daily spend of visitors, estimated revenue from MICE and the total tax revenue generated by tourism (regionally and nationally). We will work to acquire numbers that outline how many visitors use other types of accommodation, such as Airbnb, in order to keep an eye on their effects and ensure they continue to benefit tourism.

/ We will work to establish the tourism carrying capacity of the Faroe Islands, focusing primarily on vulnerable locations at risk of visitor pressure issues during the high season.

/ In collaboration with others, we will organise a wide array of competence development initiatives with the aim of supporting start-ups and professionalising the tourism industry.

/ We will map the digital behaviour of our visitors before, during and after their stay in order to better adapt what we have to offer and our digital information and marketing to their demands. Digital insights also play a key role in alleviating future pain points of visitor pressure and recreational use of our nature areas.

/ We will continuously acquire and publish relevant analysis and facts about tourism in order to qualify and clarify debates and debunk myths about tourism, both abroad and in the Faroe Islands. Furthermore, we will conduct annual public surveys about the locals’ attitude towards tourism development in the Faroe Islands, enabling us to be more proactive and focused in our tourism initiatives.

Key partners:

Data and insights: Hagstovan (Statistics Faroe Islands), Vága Floghavn (Vágar Airport), TAKS (Faroese Tax and Customs Authority)

Competence development and education: Vanufardin (incubator), Ferðaerðahúsið (incubator), Handisskúlin/ Miðnám Vestmanna (College), Ferðavinnufelagið (Tourism Association), Kunningarstovurnar (tourist information centres)

Digital behaviour: Telecommunication companies, Fjarskiftiseftirlit (Telecommunications Authority)

The professionalisation of the tourism industry is imperative in upholding a high standard of quality tourism products.
A common legislative framework
We recognise the need to take action to safeguard our primary tourism product: nature. Our natural splendour is the most significant factor that influences travellers when deciding to visit the Faroe Islands. The current legislation concerning nature protection and access to nature is outdated and dysfunctional, as it does not include the necessary tools for sustainable regulation of nature.

The creation of a new legislative framework, enabling both the sustainable use of and access to our nature, is imperative and pressing. This is a prerequisite for implementing effective systems that will enable a sustainable, well-organised and transparent tourism with regards to payment, information and safety. Faroese nature must remain accessible and unspoiled alongside an ongoing tourism development.

Tourism is a complex and dynamic industry with many different interests and focus areas that deal with nearly all Faroese authorities. An effective tourism management requires extensive coordination and collaboration across municipalities and ministries. It also requires political action and new legislation, if our tourism is to remain sustainable and maintain public support over the long term.

The 2025 vision

In 2025, the Faroe Islands is a trailblazer when it comes to sustainable tourism management and nature protection. We have achieved this status through new legislative action that has ensured a sustainable tourism development, beneficial to the Faroese nature. This has also been achieved through our shared manifesto (as mentioned under cornerstone #1) as a strategic and sustainable benchmark for businesses across the industry.

With preservolution as its guiding principle, the Faroe Islands has a new, clear framework for nature preservation, and regulations for recreational and business-related use of our nature now exist. Furthermore, the first protected areas or national parks have been established with special limitations, designed to protect vulnerable animal life and nature. Lastly, strategic focus on sustainable cruise tourism in the Faroe Islands has been put into motion, ensuring that our destination attracts cruise ships and quality-conscious visitors with higher economic potential and a more sustainable footprint.

Faroe Islanders want new legislation

How much do you agree with this statement: We need new legislation that introduces a common solution with regards to the use of and access to our nature.

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<td>2</td>
<td>11.75%</td>
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<td>3</td>
<td>14.50%</td>
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<td>4</td>
<td>15.75%</td>
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<td>5</td>
<td>45.75%</td>
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<tr>
<td>Don’t know</td>
<td>26.75%</td>
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Source: Spyr survey, July 2018, 400 Faroe Islanders across the country questioned.
We will advocate for the introduction of a Nature Preservation Fee on all types of visitors to the Faroe Islands. This money will fund a National Nature Preservation Foundation that reinvests the money in sustainable and nature-preserving projects and activities across the Faroe Islands.

We will advocate for a democratisation of the Faroese travel tax of DKK 65 to all types of travellers with no exceptions. Currently, only about half of visitors to the Faroe Islands are subject to the travel tax, with cruise passengers being exempt. The income should be earmarked for investment in tourism infrastructure.

Key initiatives towards 2025

- We will work for better, more contemporary regulations for access to and use of our natural areas, including shared guidelines for hikers and landowners with clear rules for collection of access fees.

- We will be an active, supporting partner in the process of developing and implementing a joint system for the use of and access to our nature. This system will be beneficial to our nature, tourism and agriculture, and function as a foundation for better information and safety in nature.

- We will actively support the prioritisation of nature and animal preservation, in laws and in practice.

Key partners:
The Faroese Government, The Faroese Parliament, environment agencies, Búnaðarstovan (Agricultural Association) and farmers’ associations.

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Three marks of success for 2025

To ensure that we stay the course in the years ahead, we have formulated a set of clear, key objectives that closely reflect the value added to society, our visitors and our locals.

2025 MARK OF SUCCESS 1

DKK 1.5+ billion in socio-economic revenue
2016 Baseline: DKK 606 million

Because tourism’s economic contribution to society remains integral to us. A growing tourism will result in a growing number of jobs created, tax revenue and investments that would otherwise have been impossible to achieve.

2025 MARK OF SUCCESS 2

90% of visitors agree with our brand promise
2018 Baseline: 86.6%

Because we wish to keep the Faroe Islands “unspoiled, unexplored and unbelievable.” Measuring success via more generic metrics, such as overall satisfaction or intention to recommend, is not enough and is not in line with our central promise to the Faroese. We want visitors to continue to agree with our brand promise in the future.

2025 MARK OF SUCCESS 3

>80% of citizens see tourism as a net positive
2018 Baseline: 66%

Because local support for tourism is a key element for the future success of our industry. We want locals to recognise the material and non-material value of tourism, and that it is a force for good in our society.
JOIN THE PRESERVOLUTION!