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Nature Based Tourism Trends: An Analysis of Drivers, Challenges and Opportunities

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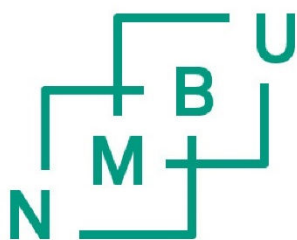
Master in Nature-based Tourism
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Foreword

This thesis is written in the two-year master program *Nature Based Tourism* at the faculty *Environmental Sciences and Natural Resource Management* at the *Norwegian University of Life Sciences (NMBU)*.

This work would not have been possible without the work members of the BIOTOUR research program and access to their data sets. This thesis is a part of the research program, and will hopefully prove useful for future work on the subject.

I would like to thank my supervisor, Peter Fredman (NMBU), and my co-supervisor, Jan Vidar Haukeland (NMBU), for their contribution to the thesis; literature, good advice, patience, and understanding. Finally, I would like to thank my friends and my three children and husband for their invaluable support through thick and thin.



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Abstract

Nature based tourism is one of the fastest growing areas of the tourism industry in the world. Nature has been a key attraction in Northern countries, such as Norway, Sweden, and Finland for decades. Therefore, the commercial initiators have interest in focusing their innovation and product development in correlation with emerging trends and viability prospects.

This proposed research aspires a structural approach for identifying the trends in nature based tourism, in Norway, Sweden, and Finland, with the potential largest impact on commercial opportunities. Followed by an analysis of their underlying drivers, associated challenges, and opportunities by means of an explorative Delphi method.

The highest-ranking tourism experience trend for Norway was to *experience local culture and locally produced products*. For Sweden, the top trend was *nature experiences and high quality services and facilities*. And finally, for Finland, the top trend was *physical activity and fitness in nature*. Additionally, drivers, challenges, and opportunities for these trends were presented.

Each country seems to have its own focus on the range of nature based tourist activities. Norway with a high focus on outdoor recreation, Sweden on luxury and soft adventure and Finland on health and wellness.

This research is a part of the BIOTOUR research program, funded by the Norwegian Research Council. One of the main objectives of the BIOTOUR programme is to identify trends in nature based tourism, and the challenges and opportunities these trends may present. It is a cooperation between researchers in Norway, Sweden, Finland, Switzerland and The United States, for investigating the development of nature based tourism in coming years (www.nmbu.no/biotour).

Keywords: Nature based tourism, Delphi Method, trend forecasting, BIOTOUR

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1.0 Introduction

People have been travelling and visiting places away from home for a long time. This involves both embarking on a journey to discover new destinations as well as returning to known places. Modern tourism has evolved in many ways because of urbanization of Western Europe around 1750. With a growing class of free labour, the wheel of tourism was slowly set in motion. At this time people moved from land-bound positions to working in factories. In the factories, people received more leisure time, as well as higher wages. Before this change, there had been only a small elite, such as monarchs and religious leaders, that had the possibility to travel (Mason, 2011; Middleton & Hawkins, 1998). With positive economic growth and ever-improving transport, tourism as an international industry still growing.

Tourism has been defined by the World Tourism Organization (1995) (UNWTO), a specialized agency by the United Nations, as “the activities of person travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes”. Tourists can be both international and domestic visitors. In addition, tourists can be categorised further, based on the activities they are seeking. The adjectival can be anything ranging from city tourism and music tourism to wellness tourism or wildlife tourism. An area must find its strength and keep up with the times to maintain its status. One tourism form which has been most rapidly gaining status and popularity in recent years is nature based tourism (Fredman & Haukeland, 2017; Tyrväinen et al., 2014; Weaver et al., 1999).

Without a conclusive definition, nature based tourism has been used to describe tourist activities which happen in nature and outside of one’s daily surroundings (Fredman et al., 2009). Consequently, nature based tourism is divided into many kinds of tourism branches. These branches involve both domestic and international tourists, travelling on holiday or for work, taking part in either commercially planned activities or making their own plans (Fredman et al., 2009). As the possibilities are many, it is important for policymakers, as well as commercial actors, to follow trends to focus their efforts on activities with presumably growing popularity.

The study of future trends has been popular in tourism studies. These studies help both the tourist industry as well as policymakers to prepare and more quickly adapt to the ever-changing climate of tourism. These trends can include the sheer number of tourists that are

expected to visit a destination, or as detailed as what activities tourists are likely to engage in or look for. So far, these studies have mostly been so-called quantitative forecasts, based on data from past and present. These forecasts are often an interpolation or simulation of numerical data (Bauernfeind et al., 2010). Although less used in historical perspective, qualitative foresights have also been used for the same purpose (Güel, 2012).

Qualitative data, for future forecasting, can be obtained with various approaches. The most common tools are scenario design, trend analysis and the Delphi method (Güel, 2012). These tools are mostly based on the judgement and belief of experts in their field of study. This data can be used to manage and form a strategic vision for a tourist destination. By gathering and analysing qualitative data from tourism experts, a prediction can be worked out about how trends will develop over time. The aim of this thesis is to do just that. This brings up the following problem statement.

1.1 Aim and research question

The aim of this thesis is to identify the trends in nature based tourism in Norge, Sweden and Finland, which have the most impact on commercial opportunities. The research question is:

“Which trends in nature based tourism, in Norway, Sweden and Finland, have biggest the impact on commercial opportunities?”.

Followed by a description of the background of these trends by answering:

- What are the drivers affecting the trends?
- What are the challenges related to the trends?
- What are the opportunities presented by these trends?

This proposed research aspires a structural approach for identifying the trends, based on data from a Delphi study. Followed by an analysis of their underlying drivers, associated challenges and opportunities by means of an explorative Delphi method.

This research is a part of the BIOTOUR research program, funded by the Norwegian Research Council. One of the main objectives of the BIOTOUR programme is to identify trends in nature based tourism, and the challenges and opportunities these trends may present. It is a cooperation between researchers in Norway, Sweden, Finland, Switzerland and The

United States, for investigating the development of nature based tourism in coming years
(www.nmbu.no/biotour).

2.0 Theory

To be able to analyse the results of the Delphi method, one must first review and define earlier studies on the topic. It is important to map out the definitions and the meaning of the terms presented by the expert panel. The selection of topics presented below; nature based tourism, future studies and trends, is considered a natural background for the research topic. The more specified selection of topics; the *main trend themes for this thesis*, is inspired by previous work done in the BIOTOUR research program, presented by (Johansen, 2017).

2.1 Nature based tourism

The tourist industry, worldwide, has been estimated to account for about 10% of the gross domestic product. Nature based activities and recreation has been reported as one of its fastest growing sectors. Although there is a general lack of conclusive data to support such reports, it underscores and recognizes the importance of nature based tourism, especially where there is lack of motivation for nature preservation (Balmford et al., 2009). Nature based tourism is defined as any travel during which a traveller appreciates the nature or the environment. It is a broad term which includes a wide range of tourism experiences, all associated with nature (Roxana, 2012). Another definition is presented by Valentine (1992), where he concludes that nature based tourism consists of experiences that are dependent on nature, that are enhanced by nature and experiences for which a natural setting is incidental. Those who seek out nature based tourism activities are described as being interested in nature and being physically active (Pennington-Gray & Kerstetter, 2002). The definition used for nature based tourism, adopted in this thesis, is presented by Fredman et al. (2009); “Nature-based tourism reflects visiting natural areas outside one’s ordinary place of residence”. It is considered sufficiently widely defined for covering all the aspects of nature based tourism discussed in this research, that is, activities, nature and society in general. In Figure 1, Fossgard and Stensland (2013) have presented in a schematic way, how nature based tourism is positioned in relation to the elements.

With growing interest amongst tourists, nature based tourism is gaining economic status and attracting more entrepreneurs (Fredman & Tyrväinen, 2010). It has become the go-to solution for providing economic possibilities in nature near rural areas, where small-scale tourism businesses seem to thrive better than conventional industry (Brouder, 2013; Margaryan, 2017). The natural resources, used by these tourism businesses, are often public areas, with

properties that are indivisible and non-excludable, free and incidental. In addition, in Sweden and Norway, the Right of Public Access makes it difficult for initiators to prevent others from entering nature areas, or to charge entrance fees (Margaryan, 2017; Sandell & Fredman, 2010). The concept of commercialization can be used for describing the utilization of nature or culture to a tourism product. This applies to the wide scale of tourism activities, ranging from specialized adventure tourism to soft adventure tourism (Margaryan, 2017).

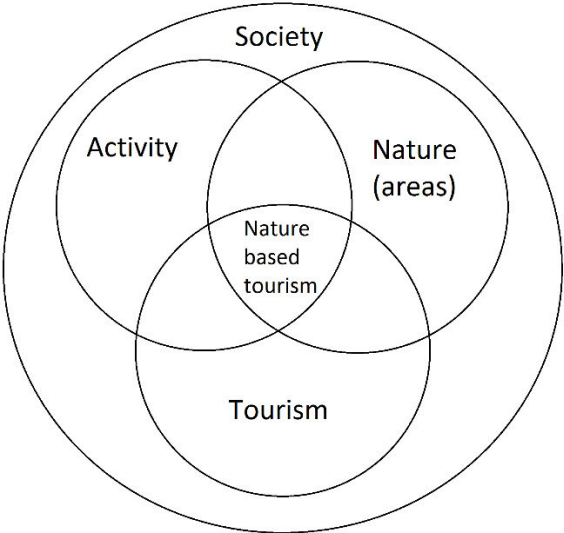


Figure 1: Nature based tourism in relative position to activities, nature and tourism (translated from Norwegian) (Fossgard & Stensland, 2013).

2.2 Trends

A trend, a general direction in which something is developing or changing, can be defined by their sheer magnitude of impact on society and the duration of the trend. The internal, or external, factors which affect these trends are defined as drivers.

2.2.1 The concept of gigatrends

The term gigatrend is used for structural changes in the very foundations of civilisation, often over a period of over 10 years, up to 100 years (Taucean, 2012). These changes have in common that they affect everyone, some without them even knowing. Scientists have identified a few of these trends. Climate change is a very hot topic these days and has all the characteristics of a gigatrend. It changes habitability of areas, weather patterns and the way people consume and behave (Jones, 2011). Change in core values of beliefs and ethics are

social and cultural gigatrends. Demographic shifts, such as birth-rate, age and geographic distribution are gigatrends. Major technological inventions and global economic dynamics are also considered gigatrends (Hjalager et al., 2015). The emergence of Brazil, Russia, India and China as economic powers, is considered an example of economic gigatrend (Jones, 2011).

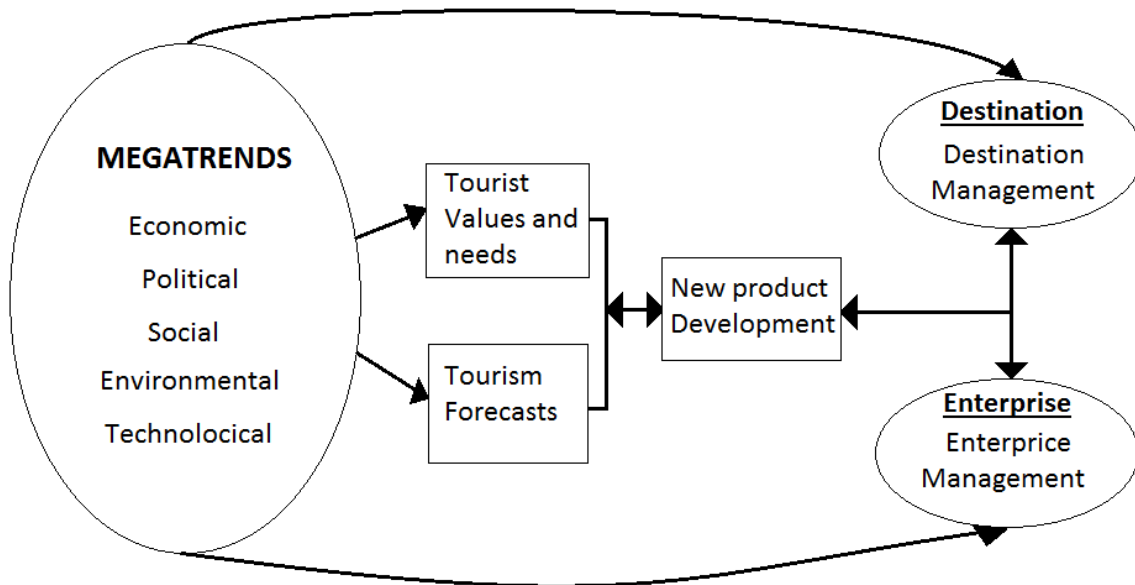


Figure 2: A model explaining the influence of megatrends on tourism (Dwyer et al., 2008).

Megatrend is a term inspired by John Naisbitt (1982, cited by (Taucean, 2012)). It is a pattern that decides how people decide to live their lives. The term is often used for a trend that extends up to 10 years. Megatrends can be economic, political, environmental, technological, demographic and social. In the model in Figure 2, one can see how these patterns affect the tourism industry. The model explains how megatrends influence tourism. The megatrends affect a tourist's values and needs and are predicted with forecasts. It affects both destination and enterprise management and leads to new product development (Dwyer et al., 2009).

Megatrends are often a result of a change triggered by a gigatrend.

Paradigms are methods for understanding how society works. It is a distinct set of concepts or thought patterns, including theories and research methods. Political views and ideology are examples of paradigms (Hjalager et al., 2015). Paradigms change and they influence how, for

example, enterprises are operated, both through new political regulations or ideas on a management level.

2.2.2 Megatrends

The following is an account of the megatrends, and their related sub-trends, that influence nature based tourism in this research (Buckley et al., 2015; Dwyer et al., 2008; Dwyer et al., 2009; Elmahdy et al., 2017).

2.2.2.1 Economic trends

There is a steady growth in the world economy, and it is expected to continue through coming years (United Nations, 2017). Increased prosperity and income will have a big influence on the possibility to travel and result in growing demand for nature based tourism, both domestic and international (Elmahdy et al., 2017). Studies have shown that there is a link between household income and expenditure on a vacation (Fredman, 2008). One can, therefore, assume increased income for tourism businesses in coming years and that affluent tourists are the most lucrative marketing group. Affluent tourists are more likely to seek out quality services and activities (Elmahdy et al., 2017).

Economic growth in emerging economies, such as Brazil and China, will bring more tourists from distant cultures to Europe. Exotic nature resorts, which previously only high-class tourists visited, are now occupied with the growing middle class of in countries of emerging economies. So far, destination management has developed with the norm of predictable behaviour of Western tourists. With emerging markets, destination management must adapt to changing behaviour, demands and expectations of the tourist masses. This holds true especially for wildlife preservation, where disturbing of wildlife is strictly prohibited, and less experienced tourists can cause conflicts with the more experienced with a wrong approach (Buckley et al., 2015; Elmahdy et al., 2017).

The sharing economy is also affecting the tourism industry. It allows tourists to access services and accommodation without the involvement of convenient business enterprises. The price in the shared economy is usually lower, which allows tourists to spend more on, for example, recreation and restaurants. Studies show that the peer-to-peer interaction produces a net economic gain for the local tourist industry, by bringing in more tourists (Elmahdy et al.,

2017). Finally, fuel costs are said to have a significant effect on tourism demand on both domestic and international markets (Buckley et al., 2015).

2.2.2.2 Political trends

World politics, war, terrorism and political turbulence, affects tourism. The Nordics benefit from having a secure and safe image in world politics. Border regulations, such as the Schengen agreement, can help open new tourist markets, by allowing tourists to pass through borders with more ease. The introduction of China's Approved Destination Status, has resulted in the fact that China is expected to become the world's largest outbound market by 2020 (Dwyer et al., 2009; Elmahdy et al., 2017; Johansen, 2017).

2.2.2.3 Environmental trends

Climate change and tourism are fundamentally connected, due to the reliance on countless tourism products on natural resources and the weather. There is a growing realization throughout the world community that human activity has affected air and ocean temperatures, precipitation distribution and intensity and wind patterns. This development can lead people to pay more attention to nature and feel induced to interact with it before it is ruined (Frost et al., 2014). "The natural environment and climate conditions are very important in determining the viability and attractiveness of a region as a tourist destination" (Dwyer et al., 2009). Nature based tourism is sensitive to extreme weather events, such as hot winters or cold summers (Buckley et al., 2015). Winter tourism in northern regions is threatened by climate change, whereas summer tourism might get strengthened (Dwyer et al., 2008). However, with increased precipitation, more frequent fog can cause problems for some nature based activities (Elmahdy et al., 2017)

Nature based tourism is dependant on planning and utilization of land. Agriculture, forest degradation and urbanization are factors which commonly decrease the quality of nature based activities and the experience of visitors. Studies have pointed out the need to have a parallel between nature based tourism and recreation and nature conservation in national environmental policies for protecting nature ((Fredman & Haukeland, 2016) (cited by (Elmahdy et al., 2017))).

2.2.2.4 Technological trends

With advancing transportation technology, a way of travel is getting both faster, cheaper and more convenient. This makes all travel a lot easier and brings remote places closer to big markets. Low-cost carriers have helped the development of less known destinations. Environmental issue, such as emissions of greenhouse gasses, might affect the aviation industry in the future. Stricter regulations may have negative effects on destinations such as Norway, which is far from markets. Technological infrastructure to handle tourist traffic must be present to prevent environmental damage, and the consequent degradation of the destination (Elmahdy et al., 2017).

Bridge and road construction is considered one of the main reasons for the emergence of tourism in peripheral areas. Studies have shown that poor road net and transportation infrastructure is hindering tourism development in peripheral places. Good road connections are especially important for tourists travelling on their own in peripheral places, as they will prefer to use cars (Elmahdy et al., 2017; Lund & Jóhannesson, 2014).

Outdoor equipment is also a subject of technological trends. The equipment and clothing are becoming more expensive and specialized for each activity, empowering the user with increased safety and comfort. Equipment development is allowing tourists to access places that were out of their reach before. Generally lighter equipment makes it easier for a bigger group of tourists to use it. This applies to anything from bikes to climbing gear (Elmahdy et al., 2017).

Information and communication technology (ICT) has had a big impact on tourism. New technology allows tourism operators to minimize operating costs while adding value to the experience of the customer. The internet and new booking systems, social media and online reviews, have an impact on the industry. ICT also allows operators to analyse consumer behaviour and the customer to easily customize his service and experiences (Dwyer et al., 2008). Social media is important for sharing experiences with other travellers. Electronic word of mouth is an important factor which influences destination image and tourist's perception and travel motivations (Elmahdy et al., 2017).

2.2.2.5 Social trends

Growing world population will result in increased demand for nature based tourism. The world population is expected to grow by approximately one billion within the next 10 years alone (United Nations, 2017). The dramatic increase in demand for nature based tourism, will result in increased stress on natural resources and land use and cause challenges for the nature based sector. It is also changing markets and tourist behaviour. Crowding in natural areas reduces the quality of the experience (Elmahdy et al., 2017). Household composition is also changing. Families are getting smaller and the age of women at childbirth is increasing. Coupled with increased free time and income, this results in families and couples that have more free time and money to spend on travel and recreation. Those who do not have children are prone to choosing more risky activities and with the described change in family compositions, demand for family-friendly activities is therefore expected to decrease (Tangeland et al., 2013).

The world population is ageing due to higher life expectancy and decreased fertility rates (United Nations, 2017). The new generation of elderly is healthy and in shape, ready to participate in outdoor activities. They still need recreation and services that fit their needs. This applies to trails, accommodation and other services. The elderly are likely to prefer hiking and other less energy demanding activities (Elmahdy et al., 2017). They also focus on health and well-being. In nature based therapy there will be more emphasis on preventive therapy, through meditation, exercise and other spa therapies and treatments, rather than healing (Frost et al., 2014). Studies show that nature based activities can have measured positive effects on physical health and well-being (Song et al., 2017).

Younger generations are increasingly participating in sports activities and seeking sporting holidays. This includes activities which promote fitness and health. Sporting events are also attracting more tourists, although they are mostly dominated by men. This means that both younger and older generations are seeking more active holidays (Elmahdy et al., 2017).

Urbanization is increasing at a steady rate. Currently, about 70% of the population in developed countries live in urban areas. Within a generation, most of the world population will be living in urban areas. This will increase the desire for escaping crowded cities and spaces, resulting in further demand for nature based tourism as tourists will be seeking peace and quiet (Frost et al., 2014).

The reduction of physical activities at work, in post-industrial societies, means that physical activity at leisure time is key to living a healthy and active life. Change of work patterns also increase flexibility in travel plans, as decentralized workplaces are becoming increasingly common, allowing work to be carried out outside common office spaces and at times without any specific time barriers (Dwyer et al., 2008).

Society is becoming more feminized (Dwyer et al., 2008). Women are having a more significant influence on key decisions regarding choice of holiday. Studies show that gender plays a big part when choosing nature based activities. Women are more prone to evaluating scenery, services and products which provide convenience and experiences which give relaxing recreation (Elmahdy et al., 2017). According to Tangeland et al. (2013), men are more likely to choose activities which are perceived and experienced as masculine, and that males are generally more likely to participate in activities which are risky.

Values and lifestyle affect, for example, how people value their spare time. Growing proportion of travellers are found to set a bigger price on their leisure time. Consumers do not want to waste time on unproductive activities. They are increasingly seeking to personalize products, services and experiences so that they meet their needs and wishes; shifting from service, to experience economy, where businesses provide a memorable experience, not only services, in nature (Dwyer et al., 2008). The tourist's individualistic approach means that behaviour is driven by the need to define oneself by the products, services and experiences consumed. Furthermore, tourists are now seeking new experiences and searching untouched, unique destinations that are less known than others. This is related to growing interest for authenticity and existential authenticity, which is the need to find one's authentic inner self (Elmahdy et al., 2017). Increased environmental awareness is also a part of changing values and promotes a more ethical consumption. With increased empathy for the environment, people are willing to pay more for protecting the environment (Dwyer et al., 2008).

2.2.3 Main trend themes of this thesis

The selection of following topics is based on previous work related to the BIOTOUR project (Johansen, 2017).

2.2.3.1 Authenticity

One of the most popular trends in tourism is authentic experience (ITB, 2012). In tourism context, authenticity first linked with the matter of authenticity of objects in museums, to answer the question of whether the objects on display were authentic or not. This is called objective authenticity. Later the term was extended over to tourism experiences and toured objects. The authenticity of the experience is based on how the tourist perceives the “staged” world as real. A toured object is for example nature. With the narrow definition of objective authenticity, the tourist experience of a tour can be said to be inauthentic, irrelevant of what the tourist felt if the tour was in fact staged. Less objectively measurable is the concept of constructive authenticity. Things appear authentic because of the way they are constructed in terms of points of view, beliefs or perspectives. The concept is, therefore, a relative projection or expectation a tourist has about a toured object. These are two conventional definitions of tourist authenticity (Kim & Jamal, 2007; Ram et al., 2016; Taheri et al., 2018; Wang, 1999).

The last definition of authenticity introduced here is the inner experience of the tourist. The concept of existential authenticity was not made by tourism research but is adopted in it by i.e. Wang (1999) and Steiner and Reisinger (2006). Different from objective and constructive authenticities, which involve whether and how the toured objects are authentic, existential experience involves “personal or intersubjective feelings activated by the liminal process of tourist activities”(Wang, 1999). Meaning that taking part in tourist activities, which differ from daily routines, no matter what the activity is, triggers the authentic feeling of existence. He goes on to state that nature tourism is the subject of existential authenticity, rather than object authenticity. Wang (1999) suggests that “even if toured objects are totally inauthentic, seeking otherwise is still possible, because tourists can quest for an alternative, namely, existential authenticity to be activated by tourist experience”.

Depending on how authenticity is defined, it may prove difficult to achieve authenticity in a planned commercial tourism setting. This is because, as stated above, there is a contradiction in the terms to plan something and having an authentic experience. It is difficult to present to tourists with a cultural scenario, without it being experienced as staged. However, no matter how constructively or objectively authentic a toured object is, one must not undermine the existential authenticity of the tourist experience, especially in nature or local cultural setting (Wang, 1999). There is a growing consent from the public that their natural heritage relates to their cultural heritage and might increase with a sense of identity. This results in people

visiting nature more often, and rate its conservation and current state higher (Elmahdy et al., 2017; Frost et al., 2014). Tourists from developed countries are particularly experimental, thus willing to try new foods, attractions and products (Dwyer et al., 2009).

The trend is also linked with rural tourism, as it links together locally produced food in natural rural environment and other cultural experiences related with travelling away from urban areas and closer the farmland and vast open landscape. Rural tourism supports the economic diversity of rural areas, which are vulnerable through monotone industry, by developing additional sources of income (Dwyer et al., 2008).

2.2.3.2 International demand

Worldwide tourism is affected by numerous megatrends. Categorized as a social factor, population growth will enlarge markets and increase demand for international travel. Economic growth and prosperity also contribute to more travel. Technological development, especially within the transport section, also contributes to more international travel. New technology makes it both faster and more economical to travel, bringing peripheral areas closer to markets and giving a bigger part of the population the chance to travel. Increased environmental awareness, and environmental problems will increase demand for travelling to distant regions with prestige and clean nature. New border policies allow citizens to cross borders and visit countries which have previously been out of reach, as for example China's Approved Destination Status (Dwyer et al., 2009; Elmahdy et al., 2017; Johansen, 2017). There is a consensus in the literature that international travel will increase. Below are presented statistics which show the development of international tourists over the past few years in Norway, Sweden and Finland.

Norway

Norway has been experiencing increased international demand for tourism for the past years. One of the reasons, stated by experts in round one of the Delphi study, is the weak currency development of the Norwegian krone (NOK). This statement is also supported by other data, adding that Norway is regarded as safe, and low fuel prices as other factors increasing international demand in Norway (Innovation Norway, 2017). In the period between 2010 and 2017, the number of overnight stays increased by almost five million. The increase of foreign visitors accounts for about two million, rising to almost 10 million overnight stays, or approximately 45% of the total increase. The share of international overnight stays in Norway

has increased from a little under 28% to almost 30%. There was therefore almost 26% more international overnight stays in Norway in 2017 than in 2010 (Statistics Norway, 2018). This development can be seen in Figure 3.

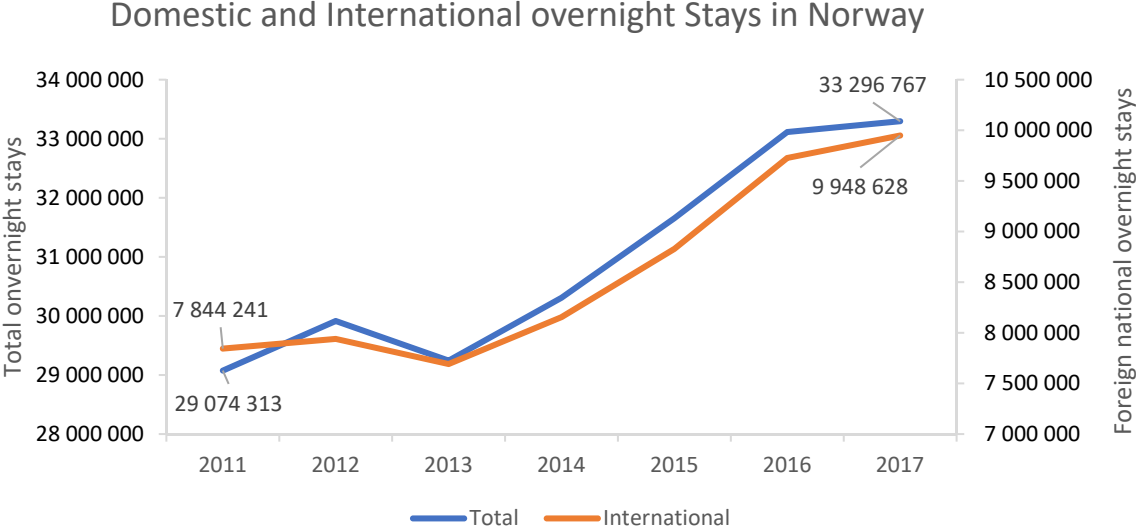


Figure 3: Number of overnight stays in Norway, and the part consisting of foreign visitors, the percentage of foreign visitors of the total sum in is parenthesis (Statistics Norway, 2018).

The tourism consumption in Norway by non-residents has also been increasing in the period. From 2010 to 2016, the increase was a little over 50%, from about 33 billion to a little over 50 billion, at the same time as the number of international overnight stays increased by about 23%. This supports the notion that tourists are spending more on recreation and services than before. According to statistics, international tourists in 2016 spent a little over half of their consumption on tourism products or about 27 billion (Statistics Norway, 2018). More detailed info is found in Figure 4.

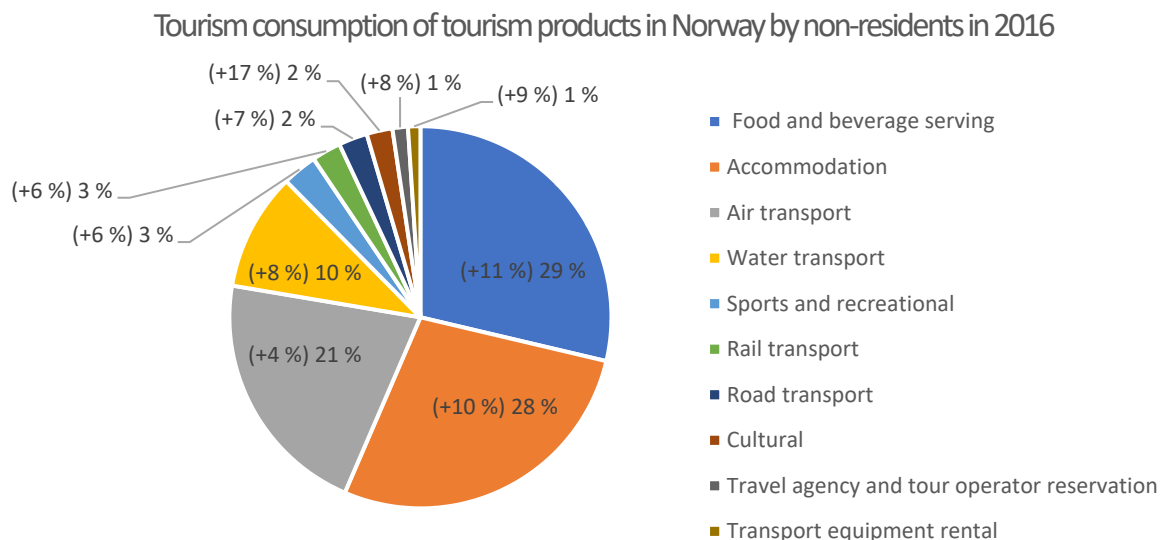


Figure 4: Consumption of tourism products in Norway by foreign tourists. Consumption of other products, not shown in the chart account for about 45% of the total consumption. Change from 2015 is in parenthesis (Statistics Norway, 2018).

Sweden

When looking at tourism in Sweden the number of international tourists visiting the country has increased significantly. The number of hotel stays has, since 1995, increased by 78%, and international guests account for 120% of this increase. The income from international tourists has been increasing as well and is the fastest growing part of the turnover in the Swedish tourist industry. From the year 2000, international tourist spending has increased by 194%, at current prices, to about 120 billion SEK. A breakdown of the expenditure can be seen in Figure 5 below. In 2016 alone the spending increased by 13%. In comparison, the total export in Sweden has increased by 84% in the same period. Tourism export has gone from accounting for 3,9% of the export in 2000 to 6,2% in 2016. Tourism in 2016 accounted for 2,69% of Sweden's gross national product (GNP), just below the energy industry (3,08%) and bypassing agriculture (1,34%) and the mining industry (0,44%) (Swedish Agency for Economic and Regional Growth, 2017). All statistics show that there has been a significant increase in international demand for tourism in Sweden.

Spending from international tourists in Sweden in 2016

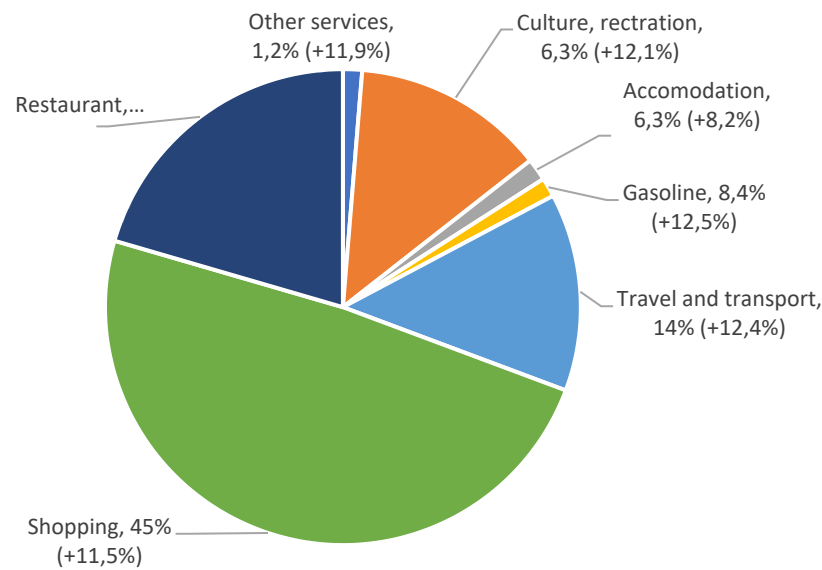


Figure 5: Graph showing spending from international tourists in Sweden 2016 divided between different categories in percentage. In parenthesis is the change from 2015. The total consumption was 119,6 billion SEK (Swedish Agency for Economic and Regional Growth, 2017).

When looking at statistics for activities, they show that in recent years, nature based activities have been slightly losing its share in the activities international tourists take part in. It is worth mentioning that even though the share has decreased, the sheer number of tourists taking part in these activities is increasing (Swedish Agency for Economic and Regional Growth, 2017). The UNWTO believes in further growth in international travel in Europe towards 2030. Since Sweden has had more growth in recent years than Europe, there is no reason to expect anything else for Sweden (UNWTO, 2018).

Finland

Over the past few years, Finland has experienced solid growth both in a number of international tourists, as well as overnight stays in accommodation establishments. In 2017, the number of international overnight stays were around 6.7 million and increased by almost a million from 2016 or about 16.8%. The number of international overnight stays have increased about 25% in the last 10 years, although there have been some periods with recession. These are linked with the international financial crisis in 2008, and then economic restrains put on Russia in the past few years, but Russians are the largest group of international tourists. Similarly, the total number of tourists visiting the country has increased by about 25% in the past 10 years, see Figure 6 below (Visit Finland, 2018).

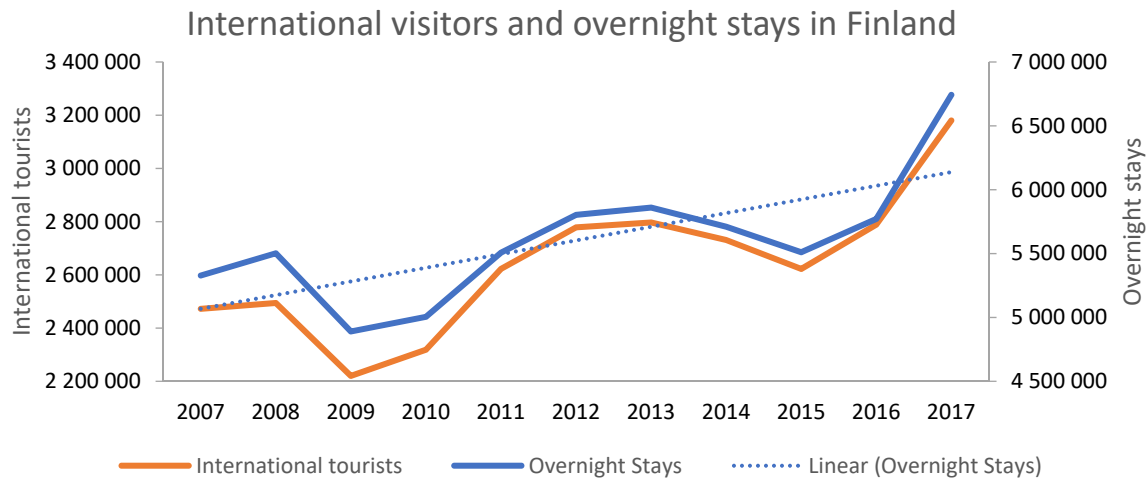


Figure 6: The graph shows the development of the annual number of international visitors in Finland and the number of overnight stays at established accommodation (Visit Finland, 2018).

There were four times more European visitors in 2017 than Asian (Visit Finland, 2018)

2.2.3.3 Sustainability and responsible travel

Sustainability is put together with the words “sustain” and “ability” and “implies a state of equilibrium in which the human population coexists in broad harmony with their natural, social and cultural environments” (Middleton & Hawkins, 1998). Sustainable development, the process towards reaching sustainability, was in the Brundtland report defined as having the ability to meet “the needs of the present without compromising the ability of future generations to meet their own needs”(World Commission on Environment and Development, 1987). This means that all improvement of quality must happen within the carrying capacity of the connected ecosystems. Consequently, a sustainable activity, in theory, should be able to continue to infinity (Middleton & Hawkins, 1998).

In the concept of tourism, this would imply to manage resources in such a way, that the needs of the current tourist, the tourism businesses as well as the tourist destinations are met while protecting the possibilities of the future. This includes cultural integrity, ecological development and biodiversity (Middleton & Hawkins, 1998). Buckley (2012) identified five key themes as insignificant for tourism; biodiversity, pollution, prosperity, peace and population. He states that even despite its significance for the industry, few tourism researchers are covering these topics, with exception of prosperity. Most of the research published is within other fields of study. According to the Brundtland report, the status of

sustainability is more of an ambition and an objective, than something which is a measurably achieved (World Commission on Environment and Development, 1987).

As sustainability is difficult to achieve, or measure and instruction of the term responsible travel has received significant attention from tourist researchers (Bramwell et al., 2008). The concept of responsible tourism is related to corporate social responsibility (Spenceley et al., 2002). The goal is to achieve good tourism business opportunities through improved holiday experiences, provide wellness to the local population, socio-economic benefits, and conservation of natural resources at the tourism destinations (Mathew & Sreejesh, 2017; Spenceley et al., 2002).

The challenges that the tourism industry needs to address to achieve sustainable development are many. It is difficult to identify all the issues relevant to nature based tourism in this study. Naming a few, mentioned in other studies, there is the behaviour of tourists and their effect on local culture and its authenticity, the destructive effect on nature through littering, excessive resource consumption and disturbing natural processes, economic leakage through foreign ownership or import of goods and pollution through the transport section. Tourism pollutes the atmosphere, oceans and drinking water. It impacts air, biota and water both directly and indirectly, with manufacturing (Buckley, 2012; Budeanu, 2007; Gössling et al., 2010). Aviation accounts for about 75% of the CO₂ emissions in tourism (Gössling et al., 2010) and tourism is expected to account for 40% of world emissions in 2050 (Cohen et al., 2014). Most attempts of tourism initiators to develop sustainability, through known practices, have proven unsuccessful (Bonilla Priego et al., 2011; Buckley, 2012).

Studies conclude that changing the behaviour of travellers, so that sustainability can be achieved, is highly improbable. They argue that a change of travel patterns, choosing more eco-friendly accommodation and picking non-polluting and more resource efficient products is not happening in practice. In addition, tourists are only willing to pay 3% more for their holiday products for being more responsible (Budeanu, 2007). The extent of the challenge is explained in Figure 7. Where tourists chose to travel, how to get there and accommodation is typically done at home and has its environmental effects outside the host destination. Then the choice of entertainment, products and services, behaviour and daily routine affects the host destination. The figure illustrates the diversity of the problems that need to be addressed, and how different types of strategies are needed to mitigate them (Budeanu, 2007).

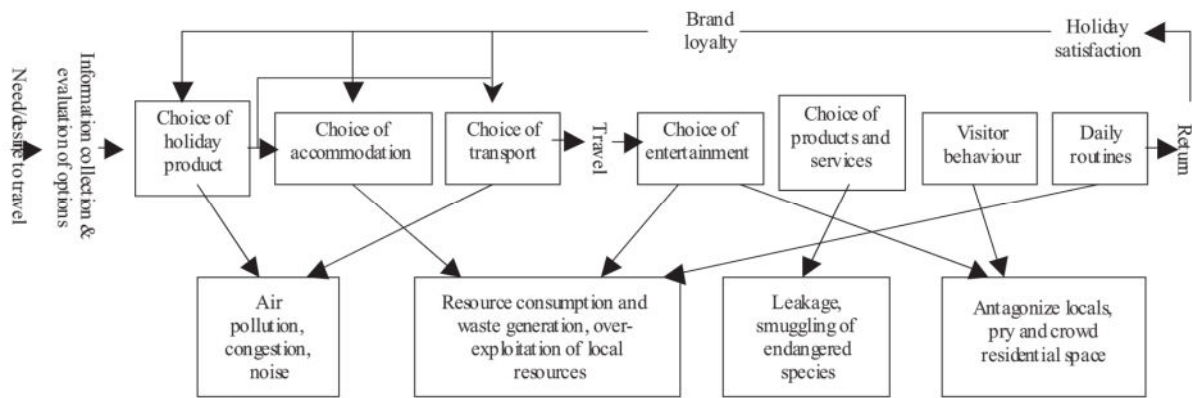


Figure 7: A flowgraph explaining examples of problems related to tourists and at what time and place they occur (Budeanu, 2007).

Although the challenges may seem overwhelming, there are some positives. Studies show that people likely to choose more environmentally friendly alternatives, providing it has the same quality and function (Mont et al., 2006). In tourism, these products are usually more expensive, so it appeals to more wealthy tourists. As to solving some of the problems mentioned above, Kornevall (2002; cited by (Budeanu, 2007)) suggests that technological advances might provide the solutions needed. He states that the adaptation of highly efficient facilities will provide sufficient reduction of impacts. As for biodiversity and intangible assets, such as culture, international initiators mention the increase of awareness of negative impacts, and increased tourist involvement in initiatives aimed at sustainable tourism as a method for reducing negative impacts (United Nations Environment Programme, 2005). In addition, in many areas, tourist revenue is a primary source for financing, and justification, for the conservation of nature (Bricker, 2013). Other measures mentioned are fines for environmentally destructive behaviour, giving tourists a feedback about the effects of their actions and rationalizing the resources available for a better distribution (Budeanu, 2007).

Destination managers are advised to shift their focus from economic growth to economic yield. The idea is to increase the value per visitor, giving a better return for the resources consumed. This would benefit social and environmental aspects at the destination and help to promote responsible travel (Dwyer et al., 2009). The demand for nature based tourism is expected to grow. As there is increased demand for natural experiences, the supply of pristine decreases. This presents the opportunity to increase the price of such experiences (Dwyer et al., 2008).

2.2.3.4 Health, fitness and well-being

Health tourism in general has been defined by the WTO as “tourism associated with travel to health spas or resort destinations where primary purpose is to improve the traveller’s physical well-being through a regimen of physical exercise and therapy, dietary control, and medical services relevant to health maintenance” (Hofer et al., 2012). Research has been done which aims at narrowing down this definition, which brings us to the terms of well-being and wellness.

The two terms are often used as synonyms, even though there is a difference, with well-being having a wider definition than wellness. One experiences well-being if life is fulfilling and worthwhile. The concept includes factors that are linked with fundamental things in life. This includes things such as food, money, freedom and services available. Well-being can be increased with for example social life and leisure activities (Konu et al., 2010; Scott & Gössling, 2015). Wellness is a more complex concept. The term was introduced by Dunn in 1959 by combining the words “well-being” and “fitness”, and with a model explaining the concept. High level of wellness is achieved with the balance of “body, mind and spirit with social environment, culture and spirituality” (Dunn 1959, cited by (Konu et al., 2010)). Another definition, presented in an update of Dunn’s model, see Figure 8, is that “wellness is a state of health featuring the harmony of body, mind and spirit, with self-responsibility, physical fitness/beauty care, healthy nutrition/diet, relaxation (need for de-stressing)/meditation, mental activity/ education and environmental sensitivity/social contacts as fundamental elements” (Mueller & Kaufmann, 2001). When parts of these relax and activity practices are undergone in relation to nature, it has led to the introduction of the term rural well-being.

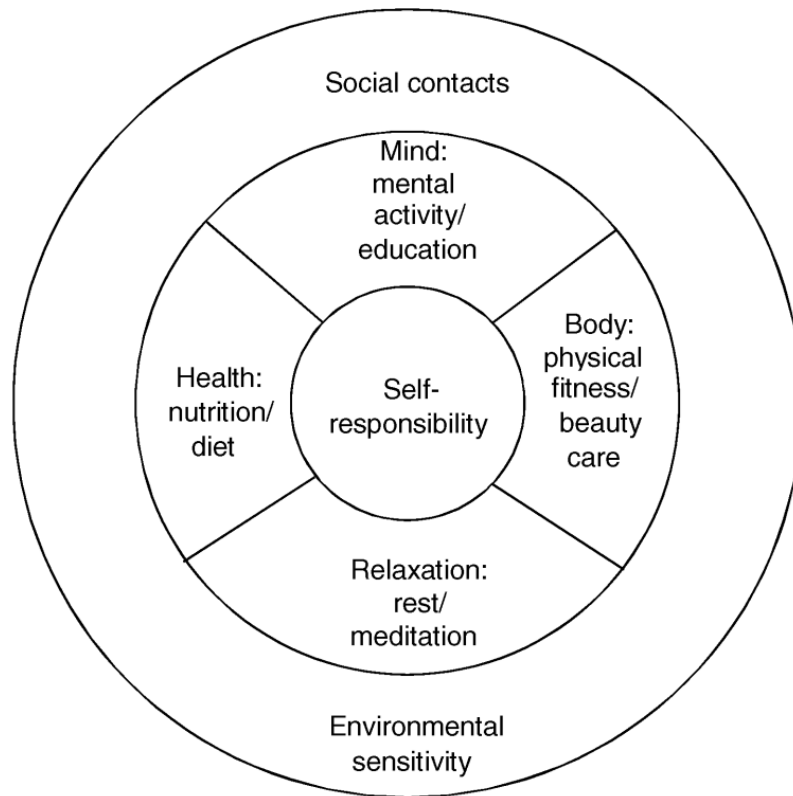


Figure 8: A model explaining the concept of wellness (Mueller & Kaufmann, 2001).

Rural well-being tourism is defined as “a form of tourism that takes place in rural settings and that interconnects actively with local nature and community resources. Based on the rural tangible and intangible, openly accessible and commercial ingredients, well-being tourism is the holistic mode of travel that integrates physical and mental wellness and health and contributes to wider positive social and individual life experiences” (Hjalager et al., 2015; Pesonen & Tuohino, 2016). According to the model presented by Hjalager et al (2015), see Figure 9, the rural environment offers a broader foundation for well-being tourism. It also acknowledges that wellness tourism does not only take place in a rural setting. The definition of the rural setting in tourism study is not conclusive either. It has been pointed out in other studies, that it can be beneficial to view it as the contrary of urban, as this gives a clearer image in for marketing purposes. It is important to emphasise that this definition of rural well-being does not distinguish between physical and psychological health.

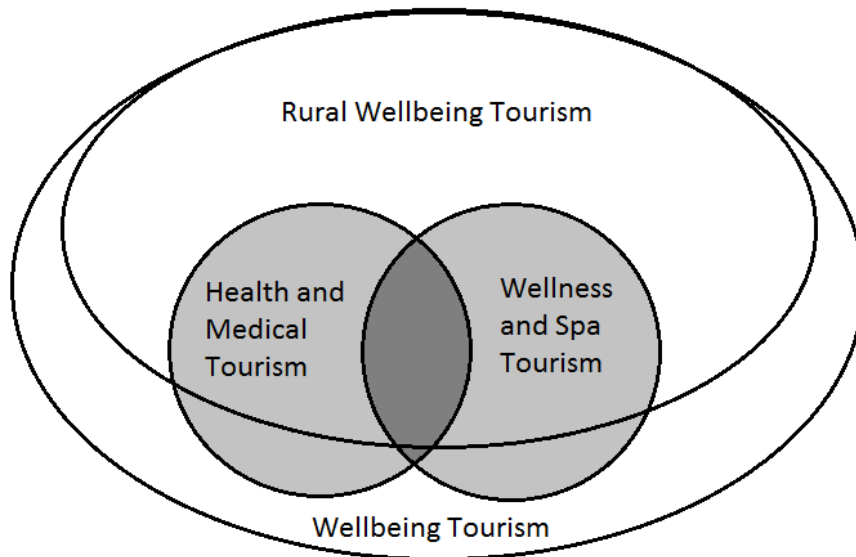


Figure 9: Rural well-being as illustrated by (Hjalager et al., 2015). It is said to take it both medical and health tourism, as well as spa and wellness tourism.

In a study performed by Konu & Laukkanen (2010), from the University of Eastern Finland, they attempted to find out what motivated people to take a well-being holiday. The focus was on the push and pull factors. According to the results, there were several factors which made people more likely to pick a well-being holiday, naming previous experience with such travel and natural sights and scenery as a few. In addition, participating in physical activity seemed to make people less likely to participate in wellness travelling, as it seems that peoples main goal, to refresh themselves, is seen to be accomplished without taking part in physical activities. Another study, which aimed at identifying activities which are connected with rural well-being, found a total of 63 activities (Pesonen & Tuohino, 2016). Furthermore, studies indicate that activities in nature, such as wandering in the forest, do have measurable positive effects on one's health (Song et al., 2017).

2.3 Future studies and predictions

There have been developed several tools which can be used for making a prediction about the future. These tools can be applied in quite wide-ranging scenarios, for different purposes and in different sectors. The aim of this prediction can be to limit doubt and risk when making plans. According to Cave (2017) forecasts and predictions “are made to support the analysis and decision process that precedes control actions”. It can, in other words, be concluded that forecasts can be used to justify present actions that are either to be affected by or going to affect future events.

In the tourism industry, future predictions have mostly been based on numerical data. One study concluded that out of 121 forecast studies in tourism that were conducted after the year 2000, only two were based on qualitative methods (Song & Li, 2008). Qualitative data most often consists of numerical data which is then either interpolated with one of many possible methods or run through a computer simulation. These predictions, that are based on quantitative data, have been called forecast, while qualitative based predictions have been called foresight (Güel, 2012). In this thesis, the data is considered qualitative, and must, therefore, be concluded as a foresight study. Uysal and Crompton (1985) used the following explanation to justify the use of qualitative approach:

“Qualitative methods of forecasting are characterized by the use of accumulated experience of individual experts, or groups of people assembled together, to predict the likely outcome of events. This approach is particularly appropriate where past data are insufficient or inappropriate for processing or where changes of a previously unexperienced dimension make a numerical analysis of past data inappropriate.”

For making a foresight prediction, there are at least two known methods that have been used in a tourism context. Mittringer (2005) used a scenario-based approach to make a prediction for Austria. When applying this method, several possible scenarios are drafted up, to get an overview of what the key factors are which affect the future, and what individual decisions have an influence in the made-up scenarios. In the case of Austria, one of the cases created was that there was now less snow because of global warming. The aim is then to have a plan made out, to know how the winter tourism can adapt to this kind of future scenario. Another research using scenarios, more closely related to the topic of this thesis, was a part of the ProWell research program. It used scenarios to predict future trends in rural wellness tourism in Finland (Hjalager et al., 2015). The process of scenario planning was presented in a model by Schoemaker (1995), see Figure 10, describing the workflow.

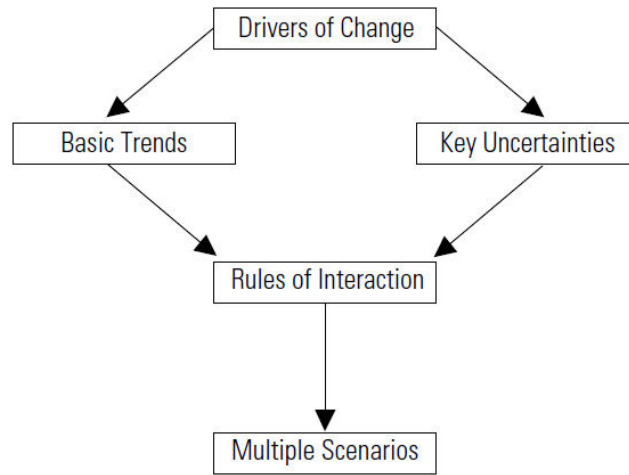


Figure 10: A model describing the workflow of scenario planning (Schoemaker, 1995).

3.0 Method

This chapter contains an explanation of and background of the methods used in the study.

3.1 The Delphi Method

The Delphi method is a qualitative approach which was established around 1950. It was developed by two mathematicians and had the goal of being a tool for foreseeing the future. The outcome of the method is carried by three factors; knowledge, speculation and opinion. Knowledge is supposed to be backed with proof, whereas speculation has none. The opinion is supposed to glue together the knowledge and the speculations and is only partly supported by evidence (Szpilko, 2014). The method syndicates the knowledge, experience and views of experts in order to reach an enlightened agreement on a compound issue (Veal, 2006).

The application of the method is as follows. First, a small panel puts together a questionnaire about a given topic. The survey is then sent out to experts in their field, who answer the questionnaire. The answers are sent back to the panel which processes the answers. Based on these answers, the questionnaire is reformed and sent back to the experts. This process describes the different phases of the method. First is the phase of gaining a fundamental understanding of an issue through discussion in the small panel. Then there is the interaction with the experts and get their view. If the views of the expert group differ a lot from the original panel, then phase three is about finding the reason for the inconsistency between the panel and the expert group. Phase three is not always necessary. The fourth and last phase is the final evaluation of the results after all the answers and feedback have been assessed (Linstone et al., 2002).

The Delphi method has been used in tourism studies. In a study of the uses of Delphi in 46 different tourism forecasting, there were mostly three kinds of research identified; event forecasting, the forecasting of tourist demand and the forecasting of future trends. The study revealed that the method seemed to give good, yet conclusive, results. The most common problem was the selection of experts to the panel, where no standard practice for selection has been developed. Nor has any optimal size of the expert panel been concluded. Most of the research presented some basic statistics to achieve consensus, but further research on more advanced statistics to examine the consensus is encroached (Lin & Song, 2015).

The Delphi method was applied in the European context to predict the development of the activity of walking. A topic, in some sense, related to nature based tourism. The aim of the study was to recognize a consensus as to what the next ten years would hold in the way of planning, image, status, attitudes, policy and behaviour. In Delphi research the experts are anonymous, but in a more innovative approach, the research team was in direct communication with the expert. Their conclusion was that this in no way invalidated the research method, which was seen as giving consensus results (Tolley et al., 2001).

3.2 The Delphi method applied in this thesis

The purpose of the BIOTOUR Delphi study is to identify the trends in nature based tourism which will affect the countries studied, within the timeframe given. The expert panel consists of experts from Norway, Sweden, Finland, the Alp region and the USA. The Delphi method has proved efficient in predicting future trends and is therefore applied in this study (Johansen, 2017; Lin & Song, 2015; Tolley et al., 2001).

The layout of the study is to base round one on open questions were the experts are asked to give written answers. The process for round one is described as exploratory and is beneficial for gathering as much information as possible from the expert panel (Miller, 2001). When applied by Green et al. (1989), this approach proved useful in ensuring that elements, which were not discovered with literature review, were revealed. This provides the study with a lot of wide-ranging info about the research subject, which will be used for interpretation of the results of next phase of the study (Green et al., 1989). For round two closed questions were assembled, based on the findings in round one. Round three is supposed to confirm the findings in round two. Schematic layout of the study is described in Figure 11. This thesis is based on data from round one and round two.

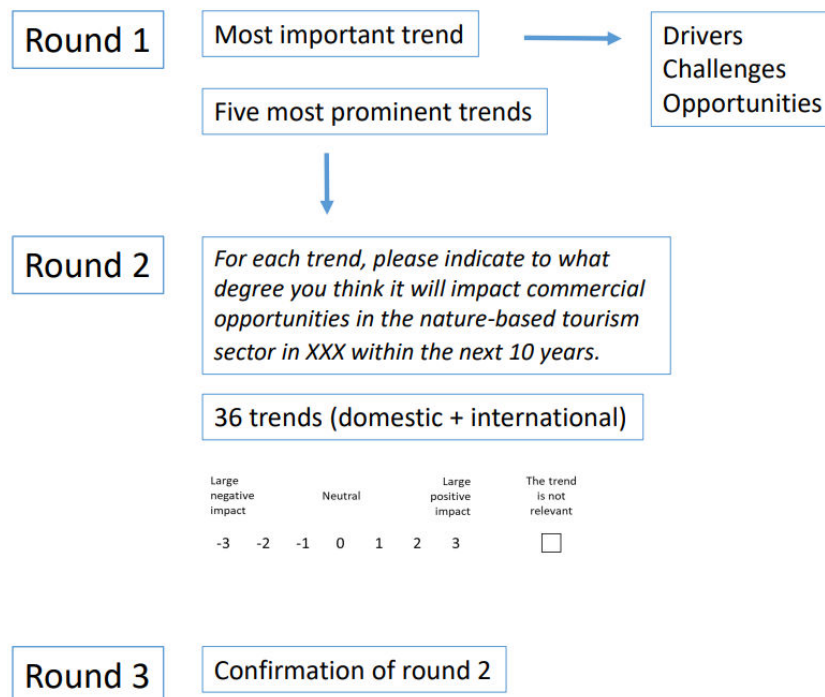


Figure 11: A schematic overview of BIOTOUR Delphi study. This thesis is based on data from round one and two.

3.2.1 Round one of the Delphi study

As described in Figure 11, in round one of questioning of the BIOTOUR study, the expert panel was asked to name five of the trends in nature based tourism they believed would be *most prominent* in their country in the next 10 years. The question is open and gives room for writing quite a lot of text for each trend in this top five list. After naming these five trends, they were asked to mark which one of these would be *most important*. The most important trend was the subject of the in-depth follow-up questions. In the first follow-up question, the experts were asked to name five drivers for the development of the trend, affected by economic drivers, technological drivers, environmental drivers, social/cultural drivers, political drivers and if needed, other drivers. Then there were two further questions with the possibility of naming five opportunities and five challenges this trend presented to the destination country in question in relation to market demand, tourism businesses, public infrastructure, impacts on local communities and finally management of natural resources.

The results of this analysis have been presented and published in a thesis by Heidis Johansen, called *Trends in nature-based tourism in Norway, Sweden and Finland: A qualitative*

analysis. In her work, she ranked up the most important trends, based on her interpretation of the answers given by the experts in round one of the Delphi method (Johansen, 2017). As described earlier, the next step was to restructure the questionnaire, based on the experience from round one, and then send it back to the expert panel.

3.2.2 Round two of the Delphi study

In round two of the BIOTOUR Delphi study, the questionnaire was changed to closed questions, as originally planned. The goal of round two was to measure the potential for business development regarding the trends extracted from round one. From round one, the total of 36 was extracted from the expert answers. This work also inspired report on trends, based on literature review, written by Elmahdy et al. (2017). These trends were divided into domestic and international trends, based on the answers given by each national expert panel, and the additional trends mentioned by other experts.

The Questionnaire sent to the Norwegian, Swedish and Finnish experts were slightly different, in terms of which trends were called domestic and which were called international – but in total the same 36 trends were to be assessed. The questions asked were as follows, with naming either Norway, Sweden or Finland, based on the nationality of the expert:

1. The following trends were identified by Norwegian/Swedish/Finnish experts to be the most prominent in nature-based tourism in Norway/Sweden/Finland within the next 10 years. For each trend, please indicate to what degree you think it will impact commercial opportunities in the nature-based tourism sector in Norway/Sweden/Finland within the next 10 years (negatively or positively). If you don't think the trend is relevant to the nature-based tourism industry in Norway/Sweden/Finland, mark the box to the right of the scale.
2. In addition to the Norwegian/Swedish/Finnish trends shown above, the following trends were identified by international experts to be the most prominent in nature-based tourism in their countries within the next 10 years. For each trend, please indicate to what degree you think it will impact commercial opportunities in the nature-based tourism sector in Norway/Sweden/Finland within the next 10 years (negatively or positively). If you don't think the trend is relevant to the nature-based tourism industry in Norway/Sweden/Finland, mark the box to the right of the scale.

The experts were asked to rate trends on a scale from -3 to +3, based on to what degree the trend would impact *commercial opportunities* in the expert’s home country. Furthermore, it was possible to mark the trend as not relevant. In addition, the experts were asked to rank the commercial potential of listed activities, but these results are not a subject of this thesis.

3.2.3 Processing of the answers from round two

As the questionnaire in round two consisted of a list of trends that were to be ranked from -3 to +3, it was possible to measure the importance of each trend. This was done by multiplying the rank by the number of answers, see example below in Table 1. The higher the score, the more important. The weight for the trend in the example below is calculated as follows $8*1+2*6+4*3-1*1=31$. The total number of answers for this trend was 19, so the mean weight is approximately $31/19=1,632$. After calculating the weight, the trends were sorted in descending order, based on the weight, so that the trends with the highest scores would line up on top. If the weight of two or more trends was the same, the number of +3 ranks would decide its place if on the list. If the ranks of the trends were the same on all levels, then the overall list of the countries would determine which trends would get a higher sorting on the list.

Table 1: Example of how the weight of each trend was calculated. N is the total number of answers and NR stands for “not relevant”. The total score for each trend is called weight. There and eight who rank the trend with a plus one and so on.

Trend / Rank	-3	-2	-1	0	1	2	3	NR	n	Weight
Experience pure nature environments			1		8	6	4		19	31

The results from the questionnaire were grouped by nationality. The answers from those who are Norwegian were summed up together, then Sweden and finally Finland. All of them were asked to rank the same trends. When the total mean weight of all the answers for each county was calculated, one could see that Sweden was more generous with their ranking than the others. When adding the mean weights of each trend for each country together, this results in the Swedish answers having a bigger effect on the final ranking for the three countries combined than the others. To account for this, the trends for each country were multiplied by a factor, which resulted in the total mean weight of the trends for each country being the same. As the same factor is applied to all the trends in each county, it does not change the internal ranking of the national trends. After the mean weight of each rank had been

calculated, the trends were sorted in descending order to determine which were most important.

To deepen the understanding of the meaning behind the trends; their drivers, challenges and opportunities, the answers from the exploratory approach in round one were used. The results are therefore a combination of data from round one and round two.

This proposed research aspires a structural approach for identifying the trends in nature based tourism, in Norway, Sweden and Finland, with the potential largest impact on commercial opportunities. Followed by an analysis of their underlying drivers, associated challenges and opportunities by means of an explorative Delphi method.

4.0 Results part 1: Top trends impacting commercial opportunities

The results of round two from the Delphi questionnaire were processed as described in the method chapter above. The results are somewhat comprehensive, and consequently, only the top 5 tables will be presented here below. All the tables in part 1 of the results are based on round two of the Delphi study alone. To see the tables consisting of all the 36 trends analysed from the questionnaire, see Appendix A at the back. These are the trends, extracted from round one, ranked by the potential impact on commercial opportunities. First, the combined results for the three countries are presented, before they are broken down and introduced by each country individually.

4.1 Top trends in Norway, Sweden and Finland combined

When putting together the national trends from all three countries in the study, as described in the method chapter above, the outcome was a top 5 list presented in Table 2 below. The list is sorted based on which trend got the highest total mean weight. The names of the trends in the table are the same as they appeared in the questionnaire that was sent out.

Table 2: Top 5 trends in nature based tourism in Norway, Sweden and Finland combined.

Trend	Score
Experience local culture and locally produced products, food etc.	19,8
Increased international demand	18,9
Sustainability and responsible travel	18,8
Health and well-being from nature experiences	18,3
Physical activities in nature for health and fitness	18,2

The list in Table 2 gives an indication of what tourists will be looking for in the next decade in the three countries the research focuses on, as they are expected to have the greatest impact on commercial opportunities. Local culture and food is on top of the list and therefore expected to be the trend which will have the biggest potential. International tourists are expected to be more interested in nature based tourism. Third on the list is a trend which is much debated in another context as well; sustainability and responsible travel. Fourth and fifth on the list are health and well-being, and physical activities for health and fitness. These

two trends are difficult to separate completely, as they both handle peoples’ interest to stay healthy and nourish their bodies.

4.2 Top trends in Norway

The results for Norway are presented in Table 3 below. These results are based on answers from Norwegian experts only. In other words, this table supposedly gives a better indication of what trends are likely to have an impact on commercial opportunities in Norway alone. It also shows how the characteristics in Norwegian trends differ from the three countries.

Table 3: Top 5 trends for Norway from round 2 of the Delphi questionnaire. Trends in italic are also on the top 5 combined trends from Table 2.

Trend	Score	+3
<i>Experience local culture and locally produced products, food etc.</i>	43	9
<i>Sustainability and responsible travel</i>	39	7
Authentic nature and culture experiences	37	8
Commercial guided services or courses in nature	37	6
Personalized and exclusive experiences in nature	37	5

The first and second trend on the list are the same as in the combined list in Table 2. The third trend on the list is about the need for experiencing authentic nature and culture, and is closely related to the first trend on the list. Guided services and courses are expected to become more popular in Norway and is in fourth place on the list. Somewhat related, and in fifth place, are personalized and exclusive experiences in nature.

4.3 Top trends in Sweden

The results from round two for Sweden are presented in Table 4 below. As for Norway, this table is based on answers from Swedish experts alone. Three of these trends are not to be found in the combined results presented in Table 2.

Table 4: Top 5 trends for Sweden from round 2 of the Delphi questionnaire. Trends in italic are also on the top 5 combined trends from Table 2

Trend	Score	+3
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<i>Increased international demand</i>	46	12
Nature experiences combined with high quality facilities and services	46	10
<i>Experience local culture and locally produced products, food etc.</i>	46	9
Demand for remote and unique places	45	9
Simple and easily accessible activities (soft adventure)	44	9

As seen in both the combined table, as well as Table 3 for Norway, increased international demand is expected in Sweden, only this time it is on top of the list. In the second place, and unique for Sweden, are nature experiences that are combined with high-quality facilities and services. Third on the list is also a common feature; to experience local culture and food. The trends in fourth and fifth place are also unique for Sweden, those are the demand for remote and unique places and simple and easily accessible activities, respectively.

4.4 Top trends in Finland

The results for top 5 most popular trends in Finland for the next 10 years can be found in Table 5 below. This table is based on answers from experts in Finland alone, and therefore not affected by the answers provided by experts in Norway and Sweden.

Table 5: Top 5 trends for Finland from round 2 of the Delphi questionnaire. Trends in italic are also on the top 5 combined trends from Table 2

Trend	Score	+3
<i>Physical activities in nature for health and fitness</i>	22	4
Experience wild food (berries, mushrooms, game, herbs etc.)	21	4
<i>Health and well-being from nature experiences</i>	20	4
<i>Increased international demand</i>	20	3
<i>Sustainability and responsible travel</i>	19	3

The results for Finland stand somewhat out from Norway and Sweden since it has a striking resemblance to trends found in the combined results in Table 2, although the trends are in different order. On top of the list are physical activities in nature for health and fitness, while its companion health and well-being from nature experiences is in third place. Between these trends, in second place, is the only trend that is unique for Finland; experience with wild food. This includes food such as berries and mushrooms, which are found in Finnish nature. In fourth and fifth place are more familiar trends; increased international demand and sustainable and responsible travel, respectively.

5.0 Results part 2: Drivers, challenges and opportunities

The following chapter is based on data from the exploratory method applied in round one of the Delphi study, which is used to provide further knowledge on the top trends from round two. The trends were broken down and viewed in context to the answers given by the experts from each destination. The trends have in some instances a different meaning and background depending on which country the expert naming it comes from. The written answers from the experts in round one were used to underscore and explain the meaning of the trends, in addition to the drivers, challenges and finally the opportunities the trends present for nature based tourism in a commercial context.

In round one, the experts were only asked to mention the most prominent trends, without naming specifically the most important trend regarding commercial impact. Most of the trends named in part 1 of the results were mentioned by someone as most important, providing in-depth data for the trend. However, there is one trend for each country that lacks relevant data about drivers, challenges and opportunities from round one. These will be interpreted in the discussion chapter. In the following results, the quotes from the experts are distinguished by adding the first letter of the subject country, followed by a number, at the back of the quote.

5.1 Drivers, challenges and opportunities the top trends in Norway

The Norwegian expert panel returned 19 answers in round two. The results from the questionnaire confirm the focus on the outdoors, outdoor activities and pure nature in Norwegian nature based tourism. The Norwegian spectre for activities is wide, as the experts foresee an increase in both soft and hard adventure tourism. A detailed account of the trends is found here below.

5.1.1 Experience local culture and locally produced products, food etc.

Amongst those who travel to Norway to seek out nature based tourism, are those who are really focused and specialized in one activity or sport, and then there are “*those that are more generalists where they often want to do different nature based tourism activities, but also want to connect to the culture, the locals and getting food experiences*” (N17). According to the expert panel, the soft adventure tourists are more likely to look for and experience local culture and locally produced products, locally harvested food, the local brew and so on. The experts note that those who visit national parks are likely there to experience local food and

culture. In addition, the experts point out that increased sustainable awareness, results in tourists being more focused on preserving local culture.

Drivers

The drivers mentioned by the experts for the trend are a political strategy for developing tourism in rural areas. As there is a high focus on nature based tourism, access to governmental support for local and regional initiatives will strengthen the development of local experiences and culture. Furthermore, curiosity is named as a driver for wanting to learn and experience more about history and culture. The rural areas of Norway are said to have “*strong identity and culture*” (N20), which is attractive for tourists. The expert states that tourists wanting to get in touch with the local population will seek out local food and drinks.

Challenges

There are challenges linked with increased traffic in small towns around the country, as more and more tourists will be looking to experience authentic local Norway. The capacity, in many places, is already not good enough. This applies to road and railway, trails and facilities. There is also the risk of less quality of service with increased tourist flow. It opens the doors for less professional initiators, who focus more on quantity than quality.

Opportunities

The trend in most developed countries has been that people have been centralizing in bigger towns and cities, at the cost of the rural population. One of the reasons has been lack of job and income opportunities. As more and more tourists seek out small-scale local activities, it opens possibilities of a new source of income in smaller communities. With the correct approach, the experts see opportunities with diverse offers of service with “*Focus on quality experiences, and link activity with a connection to local context culture, people and food, not only specialized NBT activity*” (N17).

5.1.2 Sustainability and responsible travel

Sustainability is a big trend on a global scale, and Norway has a strong sustainable image. The country is “*considered unspoiled, clean and sustainable*” (N05). According to the experts, this trend is about, through its services, “*the ethical responsibility every business has to take care of nature and local cultures*” (N18). According to the expert panel, businesses that can pose a

sustainable profile will be preferred over those who do not. In addition, there will be *“increased focus on sustainability and responsibility, (and) the ethical responsibility every business has to take care of nature and local cultures”* (N18).

Drivers

As climate change becomes *“more and more visible”* (N18) tourists are going to be more driven to choose responsible travel. As it does have the tendency to be a more expensive choice, the increased economic strength of tourists is going to trigger this drive, especially amongst Asian tourists. One of the strengths of this trend is that one could say that it is more *“driven by the customers than the companies”* (N18). There is a demand for these kinds of practices amongst those who choose nature based tourist activities. It also presents a good opportunity for justifying conservation of sensitive areas, as well as promoting the need to maintain the tourist destination. Winter activities tend to have a less environmental impact and could be used to promote winter Norway.

Challenges

As the visitor numbers start to grow there will be increased *“pressure low the prices and mass tourism”* (N18). This is one of the challenges for sustainable travel that increased tourist traffic brings. According to the experts, destination management needs to *“Be able to say no when the number of tourists pass the number of how many tourists nature can tolerate - both individually but maybe more important how this is handled collectively in different areas”* (N18). The expert continues: *“Public infrastructure will have problems to get the necessary funding to keep up with increased tourism in nature. Rules/laws that (were) originally made to protect nature by hindering human interference will have the opposite effect because it is also hindering the possibility to establish a human-made infrastructure that can protect the nature”* (N18). The experts see the *freedom to roam*, or *allemannsretten*, as a problem for limiting tourist traffic for preservation purposes. Moreover, long-distance travel poses a big challenge to the sustainability as one expert states that *“In a sustainable point of view, we should probably focus more on the close markets and not so much on the faraway markets like Asia”* (N05). Finally, another expert points out the importance of evaluating what kinds of tourists the national tourist industry wants to attract, naming the importance of having tourists *“that can live up to sustainable standards”* (N20).

Opportunities

As some of the experts are worried about crowd control at a popular destination, they see sustainability as an opportunity to “*take control of the tourism through strategies and focus on sustainable development*” (N05). Some experts see increased demand for nature based tourism as an opportunity to focus marketing mostly on tourists “*that leave the most money and are the most sustainable*” (N05). The experts also point out the opportunities of creating tourist products and experiences that are certified as sustainable. In terms of keeping up the quality of destinations, the experts see the current tourism situation, with profitable companies and new jobs, as a “*good climate for using tax money to improve the infrastructure that is related to tourism*” (N18). Finally, the experts see the increase in tourism income as an opportunity to increase funding for the “*management institutions and gives the muscles to carry out necessary changes*” (N18) towards sustainable and responsible tourism.

5.1.3 Authentic nature and culture experiences

It is difficult to define authentic Norwegian nature based experience. But one expert sums it up this way:

“Tourists visiting Norway wanting to be part of the "Norwegian experience" and enjoying easy outdoors activities like sitting around a bonfire, perhaps with a cup of hot chocolate, trying sledges like the local children do, doing small/ short adventures that are far less impressive than "whale safaris" but give a simpler and more accurate picture of every day outdoors experiences” (N21).

According to the expert, there are many tourists who do not realize how much time it takes to travel in Norway, hence, local authentic activities provide “*a good market for simpler and closer to town outdoor experiences*” (N21). The trend is considered closely related to experiencing local culture and products. A more detailed account of authentic experiences is given in chapter 6, in which a detailed explanation of the trend *experience local culture and products*, a closely related trend, is given.

Drivers

According to the experts, the trend is “*easier to connect to*” and complex and spectacular outdoor activities and experiences and in addition “*cheaper and can give a good experience also for those only staying for a short while in Norway*” (N21).

Challenges

One of the biggest challenges with this kind of tourism is that people do not know what they are looking for, as they are not familiar with the Norwegian lifestyle. There is a need for extensive marketing for getting the services out there. There is also need for professional initiators, that succeed in making travellers feel that the situation is not set up. If there is a sense of organizing around the activity, the authenticity is gone.

Opportunities

Although it might seem challenging to create an authentic situation, this trend does bring many opportunities. One of which is that it can be developed near urban landscape, as the Norwegian woods and outdoor areas are also found at the border of the big towns. The wide range of activities and easy access means that there is a big market for the trend.

5.1.4 Personalized and exclusive experiences in nature

This is the Norwegian trend that lacks data about drivers, challenges and opportunities from the Delphi study. It will be therefore analysed with a literature review in the discussion.

5.1.5 Commercial guided services or courses in nature

The Norwegian experts believe that tourists are going to seek more services for their tours in near future. They foresee increased demand for guided tours and more winter tourism.

According to the experts, the Norwegian winter is *“thought of as quite extreme and wild in many of our core tourism markets. But the interest to experience the Norwegian winter is huge, and the trends we've seen in the North the later years will expand also to other regions - as long as we're able to serve the market with interesting (and guided) products”* (N04).

Furthermore, they state that adventure tourism will promote the need for guided tours and courses for *“safe travel in difficult terrain that requires technical equipment and/or special expertise. Activities, where new or old skills are developed, gives access to new heights and unique exciting experiences”* (N22). The experts point out that there will be a need for diverse tourism products as *“This trend will continue to build a gap between the extreme and the lower key outdoors activities, what was extreme seem(s) more normal today”* (N21).

As adventure tourism will get more normalized, it will push the limits for even more extreme sports. Winter tourism will increase the demand for soft winter expeditions and activities, which require guided services.

Drivers

Winter tourism is mentioned as a key element in this trend. The experts point out that one of the drivers for this trend is the tourist industry in Norway, which *“has a lot to gain from expanding their winter seasons, as most destinations and regions in Norway have their highs in the summer months”* (N04). With increased urbanization, resulting in less frequent interaction with nature, tourists interested in nature based activities will have a growing need for guided services for their adventures. It is also mentioned that *“Winter adventures, in general, have a lower impact on nature and surroundings than their summer equivalents”* (N04), which reduces the local negative impacts on nature from tourist traffic. Furthermore, with summer activities getting more normalized, *“many tourists will thrive for the more exotic and extreme activities in other seasons and environments.”* (N04). In seeking status, more demanding guided tour products give the tourist the opportunity to pose as an *“active and a sporty outdoor type (, which) gives social status and has become a very strong identity marker”* (N20).

The tourism products mentioned in the trend are generally seen as expensive, but the experts mention that *“Many Norwegians enjoy a good economy, and many visitors that come to Norway often are quite well off ... (and) spend a lot of money on gadgets, new equipment - and to a major degree, on experienced guides, courses and unique experiences”* (N20).

Indicating that both national and international economic growth is a driver for the trend. Political will to support local, regional and national initiatives, within nature based tourism, is also mentioned as a driver for the trend. Moreover, the expert points out increased *“interest for experience design and a lot of research going on in this field, that comes to good for both the providers, destinations and politicians”* and in addition that *“the providers have become better on making easy to book-packages with hotel and experiences”* (N20).

Challenges

As the Norwegian winter tourism is generally unknown internationally, *“Collaborative efforts are necessary to build and market the right products”* (N04). The winter season is short in many areas, so diverse product development is necessary. Furthermore, the weather in the

winter season is challenging both for tour operations and for travelling to the tourist destinations. It is mentioned that the Norwegian krona has been weak, but as it strengthens, tourism demand might decrease. One expert points out the challenge of informing tourists of the demanding nature at popular tourist attractions, and that it takes time and effort to reach the places they see on photos on the internet.

The expert panel is generally worried about the status of infrastructure: *“Parts of the fiords, Lofoten and a lot of other areas have totally under dimensioned infrastructure for the massive tourist traffic (with) small, narrow and dangerous roads. Lack of parking spaces on natural attractions, (and) chaos at peak times”* (N20). The expert goes on to point out the uncertainty about the persistence of ferries, flights and important connections, and whether they are only seasonal or in service year-round. Another expert points out that the tourist trails, often made by the Norwegian Trekking Association (DNT), were made with the assumption of basic capabilities of their users, whereas many of the modern tourists lack these skills (N21).

Increased tourist traffic will put stress on the relationship between locals and tourists. According to expert, there is a risk that *“Heavy tourism might overwhelm local communities. Conflicts between tourists and locals will be a bigger problem - everything from traffic jams to littering problems, people pollution and "destruction" of local pearls. Airbnb-fiction might drive local people out of the area because of rising house prices”* (N20). Moreover, growing tourist traffic will result in *“increased pressure on natural resources/environmental impacts”* (N22) and challenge *“provider’s ability to interpret sustainable development”* (N22).

Destination management at the most vulnerable places *“will need a very different and far more restrictive type of management, concerning the amount of people allowed to visit, security, information and protection of nature”* (N20). When considering that tourists will be travelling more and further into Norwegian nature, one expert emphasises that *“allemannsretten (e. freedom to roam) opens up Norway’s outback and nature to be used for recreation(N14). We are however not good enough at stressing the last part of this right, the duty to make sure you as a visitor leave the place you've visited spotless. Unless we manage to reflect the two sides of this right we may destroy some destinations because we lack the ability to enforce "limitations" on number of visitors and have no way of "charging a fee" to ensure the facilitation and caring for the natural”* (N21).

Opportunities

According to one expert, this trend has a lot of potentials, *“Especially for soft adventures for the mass market, and (for) truly unique experiences for the high-end market”* (N20). Another expert points out the opportunity of presenting packages *“that combines the adventure, lodging and food to a more holistic experience where quality is highly appreciated”* (N21), emphasising the need for local knowledge and collaboration. Moreover, the popularity of train travel is pointed out, with mentioning of the opportunities to intergrade train infrastructure into regional tourism planning, which would benefit both the locals and tourists.

An expert points out that this trend is a good opportunity for shifting focus away from cruise tourism and increasing the local economic turnover: *“visitors that arrive in smaller groups will visit more lo(c)al shops, cafés and restaurants. This type of tourism is a clear step away from cruise ships and bus tourism that has overwhelmed much of the west coast of Norway. More opportunities for local guides, equipment rent-out, (and) local businesses”* (N21). The expert continues to mention that *“The greatest opportunity of nature based tourism is to be able to take care of and safeguard what we invite people to enjoy, A greater focus on environmental friendly choices among young people will hopefully help to keep a good balance between safeguarding and enjoying nature”* (N21). Finally, increased demand for winter tourism will help *“spreading the traffic and pressure throughout the year (and) will generally be a positive effect for the local communities”* (N04).

5.2 Drivers, challenges and opportunities of the top trends in Sweden

The Swedish expert panel was the largest one with 20 participants. The Swedish experts are aware of the increased international demand for Swedish nature. In contrast to their Norwegian colleagues, they have focused more on easy activities (soft tourism), and to be able to provide luxury, preferably private, for their customers.

5.2.1 Increased international demand for nature based tourism

The results from round two of the Delphi survey show that Swedish experts believe in a further increase in international demand, and deem it having the biggest impact on commercial opportunities. In round one, it was far from being viewed as the most prominent trend, so there is limited insight provided by the expert panel on the trend. It will be given a more detailed account in the discussion chapter.

Drivers

One of the drivers mentioned is the fact that Sweden is known for clean and pristine nature, which international tourists will find attractive when deciding a travelling destination. An expert mentions that *“More international visitors that are interested in understanding the Swedes relationship to nature”* (S01). The expert panel argues that as ever-growing part of the world population is moving to towns and cities, people are going to want to get back in touch with nature in the travels. It also mentions that there is strong political will in Sweden to strengthen the nature based tourism sector, both projects and start-up companies in Sweden, as well as international marketing and promotion for the country.

Challenges

One of the challenges mentioned by the expert panel is that *“Sweden will not be able to meet international Tourists' demands”* (S01) when it comes to quality of service. The expert goes on to mention the importance of planning ahead as *“Sweden gets more international visitors the impact on local communities will be considerable. Mainly positive when it comes to being able to keep service functions that also are important for the locals, but the local communities also have to prepare for what will be needed if the number of visitors exceed the limits for what the local Community can handle”* (S01). Stress on local infrastructure with increased international traffic is also mentioned as a challenge.

Opportunities

The panel feels that the country is still relatively unknown in an international context, supposedly meaning outside of Europe, where there is still a big market to exploit. An expert points out that there is a great *“demand for Sweden's nature, and with Swedish nature tourism in the limelight, will also increase the interest in other tourism businesses”* (S02).

5.2.2 Nature experiences and high quality services and facilities

One of the Swedish trends which differ from Norway is the quality of accommodation. The Swedish expert panel expects that tourists will be seeking out high-quality facilities in coming years, as well as peace and tranquillity in unspoiled Swedish nature; an escape from the stress and noise of the busy modern lifestyle. One expert describes the trend as opening for increased demand for package tours *“with a variety of different physical activities, combined with a high degree of comfort at the accommodation, quality of food and drink, with local*

connections” (S17). They expect that a bigger part of the tourist mass will afford to pay more for their desires and that they will be wanting more well-appointed style of travel. Continuing with the same context, another expert expects tourists to increasingly seek *“peace and quiet combined with luxury. People with good income from other parts of the world will want to experience clean and pure nature and the peace and quiet it offers but without forsaking a good night’s sleep and high-quality food”* (S11).

Drivers

This is closely linked with the trend of increased international demand, as this demand could be partly driven by a growing middle class abroad, which will be able to afford a more luxurious lifestyle. One of the reasons named for increased demand for luxurious nature based tourism is social media. There is a strong ongoing trend in the world with influence through pictures on social media. A growing group of younger travellers, often called Millennials, have a personal urge to show to their followers their standard of living. In addition, there is a growing number of so-called influencers who make a living on social media. These influencers will share with their followers their travels and experiences, in a way that can both benefit themselves, with publicity and a bigger audience, and their subject of exposure.

An expert points out that increased environmental problems abroad *“will increase the need for tourists to experience something else. Swedish nature this way will get more and more exclusive and interesting”* (S11). This expert continues *“People with these high incomes will not only want to experience peace and quiet and pure water and air. They will also want to share this in social media and be able to show off some luxury they can show they afford. This is where we will need access to combine nature with local exclusive cuisine and very nice hotels/lodges”* (S11).

Challenges

One of the challenges related to this kind of nature experiences is transporting tourists from the cities, where the masses gather, and closer to the most attractive nature places and phenomena. As one expert puts it: *“You need to be creative to find your way with public transportation to more remote nature”* (S12). This goes hand in hand with the sustainable profile the country wishes to pose. If the transport method and distances are not environmentally friendly, it isn’t responsible travelling anymore. It is pointed out by some of the experts that the Swedish railroad system needs to keep up with the times, so that the

tourist industry can offer electrified and sustainable way to travel around the country, adding that *“Customers who are also willing to travel in a sustainable way will require a lot better night train alternatives”* (S11).

Marketing is also mentioned as an issue, and the *“need to find these potential customers on the international market and market our high-quality Swedish luxury alternatives”* (S11). The expert points out that this business trend might seem risky, but there is a need for *“businesses that dare to focus on a more expensive and more luxurious experience, even though offering such an alternative cost more and even though demand right now might seem low. This goes both for lodging and dining”* (S11).

Opportunities

One of the opportunities this trend brings is, therefore, publicity through social media. The exclusivity of pure Swedish nature will be one of the drivers behind this trend, as people will seek to stand out from the crowd with more unique experiences. An expert points out that *“Sweden already has a good reputation internationally. Sweden is known for good quality and security. Swedish food culture is getting more and more well-known”* (S11) so that *“Developing your business for these luxury seekers will also give you the opportunity to reach a new segment of the Swedish market”* (S11). Eco-tourism labelling is also mentioned as *“important to keep a high-quality supply of nature services”* (S02). Finally, on a more general term, making way for high-end tourists will also have a positive effect on the accessibility for other people.

5.2.3 Experience local culture and local production

As for Norway, the experts predict increased demand for local culture and production in Sweden. The experts believe that tourists will be willing to pay extra to experience local culture and take part in interactive trips. In these trips, the participant joins in on activities that you would normally have to be invited to through someone living in the area. The Swedish interpretation of this trends seems to be related to the authenticity trend, covered in the Norwegian part. One expert sees it as a *“combination of nature, culture, physical movement and social experiences (and) doing things together”* (S13). And another expert describes it as *“Learning about nature and culture in your country through experiences in nature”* (S06). Another expert also has more focus on domestic travel, describing the trend as: *“Swedes on vacation tend to spend more time exploring nature and culture (and - for example - less time*

on the beach). To feel, sense and experience nature values, landscape, untouched forests, wildlife and wilderness is becoming increasingly popular” (S02).

As mentioned earlier, cultural trends are often related to soft adventure. One expert describes it as *“(soft adventure) to explore the nature in a genuine but well-arranged way. A mix of nature, activity, culture, food”*. Another expert emphasises the tourists desire to participate in the tour: *“Increase in demand for interactive trips, where the visitors combine experiences of nature and cultural heritage. Learning more about local culture and nature. Perhaps participating in activities involving, for example, nature conservation, bird protection etc.”* (S17).

Drivers

The experts draw up the image of the modern man who has been consumed by technology and the urban lifestyle. These tourists are going to be wanting to participate in authentic local activities. In this context, trying local food is named as a popular activity. One expert describes the drivers as *“willingness to pay extra for local food, (and) for the "exclusive" experience of participating in "backstage" activities. Awareness of money contributing to local/rural development as well as nature conservation”* (S17). He goes on to describe how technology has distanced people from nature and therefore *“increasing demand in reconnecting with nature and cultural roots”* (S17). Increased environmental awareness is also mentioned as a driver, as well as urbanization, and the desire to *“learn more and have a sense of experiencing something "genuine", meeting "genuine" local people. Wanting to experience the contrast of the urban life and man-made attractions such as theme parks etc.”* (S17).

Challenges

As people travel from the urban landscape to visit the countryside, there are certain expectations people have. Referred by one of the experts as romanticising of the countryside, where he fears that *“The expectations of a natural and cultural landscape where time has stood still might not be met”* (S17). The expert continues and stresses the need to provide quality local services, but points out the risk of *“not charging enough for the experience and services given (S17)*. He also mentions the challenge when *“(local) Business underestimate the demand for natural experiences and overestimate the knowledge urban visitors have about nature and local culture”* (S17). He calls this *“home blindness”*.

Access is mentioned as a challenge, as transportation options to rural Sweden, by other means than a car, are limited. This limits access for both international tourists, as well as domestic tourists without the ownership of a private car. For this trend to be successful, an expert underscores the importance to *“to let visitors come "backstage" and a (feel) a genuine sense of hospitality”* (S17). Informing tourists that their expenditure supports the local natural resources they are using, is also mentioned as a challenge.

Opportunities

Where people seek out local food, there is often also the opportunity to meet genuine local people, who work with making the products, this gives the food tasting an extra dimension and contributes to making the experience even more authentic. Those who run a local food production for tourists should be aware of that they are of no less interest to the visitors than the product they are selling. *“More money to the management of natural resources”* (S17) is also mentioned, as well as more jobs in rural areas. The trend is also seen as presenting the opportunity to extend the public transportation network as well as placing more charging points in rural areas for electric cars.

Another expert describes an opportunity with the trend as *“new partnerships are being explored and established; primarily locally and regionally, in order to offer tourists/visitors customized "packages", including nature and culture interpretation, but also offering local (also traditional) foods and other local/regional specialities”* (S02).

5.2.4 Demand for remote and unique places

This is the trend on the Swedish top list round two, which was not mentioned as most important in round one. There is, therefore, no data available from the Swedish expert panel about drivers, challenges and opportunities. Further info about the trend is found in Discussion.

5.2.5 Simple and easily accessible activities

According to the expert panel, tourists are also going to be looking for nature based activities, in the urban landscape and in nature close to cities. These activities demand little previous knowledge or experience and are simple to perform. These are activities that are most often linked with the concept of slow travel or slow adventure. One expert describes it as *“soft adventure, where you are in nature, experience nature in a way which is not that*

adventurous” (S09). Similarly, another expert states, that “*people want to spend time in nature and try new things but it does not have to be extreme*” (S06). Some feel that nature based tourism is relatively new as a megatrend and has therefore many newcomers with little skill and experience. Another expert calls this the trend of urban outdoors, as “*More people want to use the nature close by, they don't want to go far to enjoy nature and nature activities*” (S12). The focus on soft adventure links this with experiencing local culture and products.

Drivers

An expert points out that it is important that the activities are time efficient, and easily accessible, as there is a growing feeling among tourist “*that time is precious*” (S04). The experts believe that tourists are going to have shorter stays in Sweden, and therefore there will not be enough time to take longer trips to participate in activities far away from the cities. It is also mentioned that shorter distances usually mean less expensive trips, so it will be an economic driver for the tourists. As people are going to have less time on their hands, and are therefore now willing to invest too much time in the different activities. Furthermore, it is pointed out that this trend might be driven by economic reasons as it is “*much less expensive to stay close to home instead of travelling far*” (S12).

Some of the experts feel that there are excellent facilities for these kinds of activities near cities already today, so that alone will give the trend a head start and be a driver. In addition, there is a very wide range of both cost and kind of activities that are to consider here. Choosing the easily accessible activities will also increase one’s nearness to the local population, as the population density is higher, which in return increases one’s perception of local culture.

Challenges

One of the challenges mentioned is developing outdoor activities near and in the cities, that are easy to find, and which are accessible to public transport. The experts feel that too much creativity is needed to find one’s way with public transportation to the natural areas. The fact that many tourists simply do not know what is available, even though it is within reach, is a challenge for this trend. The experts feel that it is the responsibility of the industry to work together to make the products and services more accessible for the international tourists and known to the local population. As one expert puts it: “*More and more people do not even*

know what's out there, even though it is within an hour by car" (S20). The industry need to *"find solutions that offer simple enjoyable stay and activities"* (S20).

There is a need to present a wide spectre of products in terms of price and type of activity. Another challenge, also mentioned by Finnish experts, is the clash between public space and commercial services. It might be difficult to get people to pay for something that is actually free. In areas, mostly used by locals, it is important to make signs and give out info intended for those who do not recognise the area. Locals can become "home blind" on signs and info and that way come across as unprofessional. This will undermine the experience of the tourist. This problem also motivates locals in getting creative with everyday things, such as info and path signs. This trend presents many other opportunities.

Opportunities

This trend presents opportunities for creating products for international tourists, but also the local communities. By presenting activities in the backyard of the local population, it too will be more likely in participating in these activities. This will in return make the locals healthier. As the trend is associated with quite a wide spectre of activities it brings opportunities for creative people, not necessarily involved directly with the tourist industry, to link up with service providers and get their ideas out. As one expert put it, there is a *"huge potential to be creative ... and to serve with interesting tourism businesses of all kinds"* (S12). This also opens for different initiators, and different sectors to cooperate as many different types of services might be needed to support a business concept. As a bigger mass of people will be looking to travel to the borders of cities, this trend could present authorities with the opportunity to build out public transportation infrastructure.

5.3 Drivers, challenges and opportunities of the top trends in Finland

There weren't as many participants in the expert panel for Finland as for the other two countries. There were 10 who took part in round one of the study and nine who gave answers to the questionnaire in round two. In general, the Finnish results were a bit different from both Norway and Sweden. In addition to nature and local culture, there is a much bigger focus on the health aspect of tourism, both fitness, wellness and well-being.

5.3.1 Physical activities in nature for health and fitness

The link between nature and physical activity is obvious. According to the Finnish experts, there is going to be increased demand for practising physical activities in Finnish nature. In the expert's opinion, one of the drivers for this is the Finnish nature which will attract tourists with its clean and prestige image. Furthermore, expert states that *“people want to live healthier and be in good shape. People will travel more and further when seeking new outdoor activities”* (F05).

Drivers

The increased awareness of global climate change will push people to get out to nature while it is still in the current state. The experts are looking to both Asia and Eastern countries in this context and domestic travellers. In addition, social media and *“apparel and equipment brands will increasingly encourage consumers to a healthier life and go out and enjoy nature”* (F05). Increased focus on fitness can, in other words, increase the number of people who use nature resorts.

Challenges

Increased traffic can impose some challenges to the destinations, with more strain on trails, parking lots, facilities and so on. The experts emphasise the importance of natural resource management in general, a decline in quality of the nature destinations will result in fewer tourists. Continuous maintenance and upgrades which correspond to increase of visitors are central. It is also mentioned that economic downturns affect tourism as *“changes in economic situation will have a big impact on tourism. E.g. when economic situation in Russia collapsed, the number of Russian tourists decreased notably”* (F05).

Opportunities

Trends such as this one will bring new commercial opportunities to Finland. As tourists seek out nature resorts, they will travel out to the rural countryside. This can present the local communities with a new source of income for the inhabitants. As more and more international tourists seek activities in Finland, this will increase nature awareness of the Finnish nation, which in return will also increase visits of domestic travellers. The experts hope, that with increased international tourism, part of the increased national income could be used to

improve public infrastructure. Finally, one expert hopes that “*growing number of sport & outdoor events will increase the awareness of Finland and its unique nature*” (F05).

5.3.2 Experience wild food

As this trend was not mentioned as a most important trend in round one of the Delphi study, there is no data available about drivers, challenges, and opportunities from the Finnish expert panel. It will be interpreted in the discussion chapter.

5.3.3 Health and well-being from nature experiences

This trend is closely related to the one called *physical activities for health and fitness*. The expert panel believes that the mental and physical well-being effects of nature can play a big role in the future of Finnish tourism. One expert states that “*The mental and physical well-being effects of nature will play a strong role in future. Tourism activities will benefit from the studies proving health effects of diverse natural resources (e.g. bacteria’s living in pine trees, exposure for microbes living in nature). In addition, gaining subjective well-being from nature remains important*” (F08). Another expert adds a further description of the trend as “*relaxing in nature, slow life, nature based well-being combined in a clean environment*” (F07).

Drivers

According to one expert, better health and well-being is beneficial both on an individual level, as well as national level and the preventive benefits of wellness from nature can reduce the cost on the national health system. This can be a driver for innovation and innovative cooperation between the health and tourism sector. Such a collaboration could lead to both new products, new technology and new ways of using existing technology. Another driver has emerged with wearable technology, which “*makes it possible to measure diverse health and well-being benefits*” (F08).

Shifting focus on land use is also a trend as “*Appreciation for pure nature is strong and there is also a shift in thinking e.g. how the forests should be used. Instead of seeing forest just as biomass the intangible values of forests are becoming more important. Hence it is important to combine diverse industries such as medical/healthcare, that bring diverse approaches for utilizing the nature*” (F08). The expert continues: “*In Finland, there have been a lot of discussions how people are distracted from nature and hence their resistance for different*

illnesses has decreased. Recent studies and recommendations are emphasising the exposure for nature and microbes that live in nature” (F08), stressing that there is a growing awareness amongst the Finnish populations of the importance of outdoor activities. The expert concludes by mentioning that the need for more nature based well-being has been covered by the Finnish well-being tourism strategy.

Challenges

Although there exists a specific target group for nature based well-being, an expert point out that it is important to get more fragmented marketing data about this target group. This includes info such as different needs based on national background, cultural differences and so on. He also points out the need for *“service development activities and collaboration between diverse industries. E.g. how the tourism service providers can adapt information and results from the health and technology industries”*. (F08)

The same expert states that there might also be a challenge to separate individual tourists and those who are on commercially planned tours in a publicly open forest area for well-being purposes. As another expert put it: *“how to make a business of something that is actually free of charge? who owns the fresh air?”* (F09). This applies to pathways, fireplaces and benches and another kind of facilities commonly used for well-being in nature. Furthermore, one of the challenges the increased appreciation of pure nature presents is the exploitation of natural resources and the priority and planning of landmass.

Opportunities

An important opportunity this trend can present is the demand for special competence and skills for employees at clinics, spas and nature resorts. As mentioned by one of the experts; *“There is a need for nature based well-being tourism services and these are becoming more and more appealing. The interest in nature-based well-being is connected to many trends such as slow living, holistic well-being, forest bathing etc.”* (F08). He goes on to stress that *“There are innovative tourism businesses that are looking new services for their customers (and) using local resources and environments will bring unique selling point for businesses”* (F08). This trend also brings a new opportunity for landowners to allocate their land to something else than just forestry or cultivation. With new services and products, new business opportunities might open.

5.3.4 Increased international demand for nature based tourism

The Finnish expert panel has a strong belief in increased international demand in the coming years, without any special elaboration of the meaning of the trend. The trend is considered self-explanatory in this context.

Drivers

One expert claims that *“increasing number of sports & outdoor tourists attracts more people from abroad.”* (F05) Adding that *“Finnair is opening new direct routes from central Europe to Lapland”* (F05) resulting in increased international traffic. Another example provided is that the *“igloo-houses in Lapland interest especially foreigner customers”* (F06). Moreover *“fresh water lakes and pure nature attracts more Asian tourists”* (F05). Furthermore, on more general terms, there is *“demand for unpolluted regions”* (F08) and *“Finland is regarded as a safe country from many perspectives”* (F08). Finally, *“sustainability, accountability, equality, nature”* (F04), referred to as Nordic values, are a contributor to increased international demand.

Challenges

There are also some indications that the industry is vulnerable for economic problems in other countries, as mentioned earlier. The Finnish experts mostly do not seem to distinguish between challenges related to domestic and international tourists. Apart from language problems, most of the challenges mentioned are related with crowded tourist destinations and the problems that follow.

Opportunities

Two of the experts are hopeful that the Finnish population will benefit from international tourist by *“funding infrastructure through revenue generated from tourism”* (F10). Another expert sees opportunity in using Lapland for attracting more international tourists by presenting that *“Lapland is the last wilderness in Europe”* (F02). Yet another expert points out that a *“growing number of sport & outdoor events will increase the awareness of Finland and its unique nature”* (F05). Finally, it is stated that increased international traffic presents opportunities by *“opening minds and meeting new cultures”* (F10).

5.3.5 Sustainability and responsible travel

As their Norwegian colleagues, the Finnish expert panel believes that sustainability and responsible travel will also one of the biggest impact on commercial opportunities in Finland in the next 10 years. According one to the experts, *“sustainability and responsible travel will become even more significant part of competitiveness in tourism business”* (F02) in Finnish tourism in the coming years. Another expert goes as far as insisting that *“the growth of nature-based tourism in a longer run can only be based on sustainable business. This needs to cover all angles of sustainability, ecological, economic, cultural and sociological”* (F03). In addition, tourists’ respect for clean nature and air will increase.

Drivers

One expert mentions that climate change will change tourism products, adding that *“traveller's awareness of their own impact to climate change or destination's development will grow. The demand for more sustainable, responsible and significant tourism products will increase”* (F02): He concludes by stating that *“Political decision making will have to (eventually) follow the demand from the public”* (F02). Another expert states that *“There is less and less untouched nature in the world and the strong, global urbanization makes pure nature scarce resource (and) increases the value of nature”* (F03). Finally, yet another expert points out that there can be *“lack of pure nature and air in the (tourists) countries of origin”* (F04).

Challenges

When asked about challenges, one expert mentions that *“Tourists will demand more proof of sustainability and responsibility in tourism. Each entrepreneur will need to develop their products so that these proofs will become visible”* (F02). He then shifts his focus on a sensitive area in Finland; *“In Lapland, we would need to develop low carbon tourism centres and develop more effective and flexible connective traffic”* (F02). Another expert points out the expenses of developing sustainable solutions and the start cost of adopting them: *“More ecological solutions to waste handling or electricity production often increase companies’ costs. This can be a challenge, especially if their revenues do not grow in the phase, due to controlling of demand”* (F03). He adds that *“the growth of demand must be kept in control. Ecological sustainability is risked if the demand grows too quickly. We have already a warning example in Iceland”* (F03). He then concludes the topic by stating that *“investment in*

public infrastructure also tends to be more expensive when sustainability requirements are high” (F03).

Opportunities

When considering the opportunities presented by sustainable and responsible travel, one expert expects increased use of local products: *“In tourism business the use of locally produced food and other products will increase. Circular economy will benefit the locals, which is sustainable and therefore very attractive also from the tourist's point of view” (F02).* Another expert emphasises that importance of the topic by adding that *“sustainability also guarantees the long-term growth of this business” (F03).* He then continues by mentioning that *“sustainable solutions offer also local societies opportunities to enjoy better public infra(structure) for longer time perspective” (F03).*

6.0 Discussion

In the discussion section, the results from chapter four and five will be analysed. First, the top trends in Table 2 will be analysed before the top trend which lacked data from round one will be interpreted. Finally, the top trends from Norway, Sweden and Finland will be compared.

6.1 Analysis of the top trends

The following is an analysis of the trends concluded as having most impact commercial opportunities when combining the results from Norway, Sweden and Finland. This will be done with a literature review. By choosing the five trends from this combined table, experts from all three countries will be able to find a relevant analysis for some of the top trends presented in the results for their country.

6.1.1 Experience local culture and locally produced products, food, etc.

This trend ranked highest in the combined results from round two, it was also highest for Norway and was ranked third in Sweden. Research has shown a high probability of significant opportunities regarding commercial development of tourism experiences based on cultural and natural resources of local societies. Such tourism products interest tourists which are educated, established, prosperous, well-travelled, conscious about the environment and aware of cultural traditions at the destination. Cultural tourism is diverse. It includes both small number of very specialized tourists with specific demands and bulks of tourists with a general interest in known heritage. Those who are seeking authentic experiences will put increased demand on, for example, pristine nature (Dwyer et al., 2008).

The Norwegian and Swedish experts both mention local culture and products as a trend with increasing popularity and commercial opportunity. The trend was described as sought out by those who are looking for a “combination of nature, culture, physical movement and social experiences (and) doing things together” (S13). This Swedish interpretation correlates well with Dwyer et al. (2008) profile of tourists anticipating such activities. The trend ranked highest among the Norwegian experts. This can be partly because of the big marketing potential, linked with a broad variety of tourism products and services, demanded by tourists which are more of “*generalists*” (N17) regarding nature based tourism; wanting to experience a more mixed type of experiences, and “*connect(ing) to the culture, the locals and getting food experiences*”.

The experience economy is introduced earlier, in relation to the trend of shifting social values. It has been explained as the concept of providing customers with experiences, rather than just services or activities. Furthermore, there is forecasted an increased demand for experiencing *authentic* culture and identity (Dwyer et al., 2008). One of the Norwegian experts mentions that the rural settlements in Norway are few, but that they have a “*strong identity and culture*” (N15), supported by another expert, which sees the trend as an opportunity to “*focus on quality experiences, and link activity with... local context; culture, people and food*” (N17). This resembles well the ideology of the growing experience economy, opening the possibilities for a wide range of tourism products, making this trend lucrative for the national tourism industry in Norway.

Increased demand for local food is also a part of changing social values and lifestyles. Tourists are getting more experimental, and are increasingly willing to try out new foods and products when on vacation (Dwyer et al., 2008). One expert mentions that there is an “*Increase in demand for interactive trips, where the visitors combine experiences of nature and cultural heritage*” (S17), adding that buying exclusive local food and products will be a part of this experience, as the tourists seek to contribute “*to local/rural development as well as nature conservation*” (S17). There is, therefore, a strong sense that the trend is driven by both increased experimentation and the experience economy, and that it should present profitable commercial opportunities for many local tourism businesses, especially, as the expert's highlight, with cooperation between different local inductors.

Authenticity was described in detail in chapter 2.2.3.1 Authenticity. The experience of local culture, nature and products is closely related to the search for existential authenticity in tourism, which has been defined as the tourist's inner experience of, for example, a guided tour (Wang, 1999). Those who seek authentic nature experiences demand pristine, unspoiled nature. Norwegian expert mentions that tourists want to experience “*“real” nature*” (N11), adding that tourists are travelling further distances than before to find it. According to theory, one can, therefore, expect that tourists travelling to Norway have high expectations of the country's nature. With increased demand, conservation and protection of sensitive areas will, therefore, be a challenge for keeping this market segment satisfied.

6.1.2 Increased international demand

Many experts mention increased international demand, both as a general trend, as well as increased international demand within specific trends and activities. Statistics, presented in chapter 2.2.3.2 International demand, supports strongly the notion of increased international demand in the tourism industry in all the countries studied. In the combined results from round two, the trend ranked second. Swedish experts see it as the trend having the biggest impact on commercial opportunities, while the Finnish experts deem it the fourth most important trend. There are more Swedish experts which mention international demand as an own trend, stating that the country is attracting “*more international visitors that are interested in understanding the Swedes relationship to nature*” (S01), simply implying that there is an increased international demand for nature based tourism in Sweden. The number of international tourist in Sweden has more than doubled in the past 25 years and the consumption is almost three times higher in 2016 than in 2000 (Swedish Agency for Economic and Regional Growth, 2017).

A Swedish expert states that the increased international demand is driven by “*international tourists’ demand and willingness to pay for Sweden’s clean and pristine nature*” (S02), while a Finnish expert believes that nature based well-being will attract international tourist as “*clean environment is important for people from Asia combined with new experiences*” (F07). The Finnish expert gets support by Frost et al. (2014), which state that more affluent health tourists from China, India and Indonesia are travelling further for receiving natural therapies and treatment than before. The idea of increased international travel, from these particular countries, is echoed by Dwyer et al. (2008), which state that the “*continued growth of national economies will generate increased outbound tourism*”, naming in particular China and India, Indonesia, Brazil and Russia.

As increased international demand is driven by economic growth in economically emerging countries, boosting the outbound markets with more affluent tourists, the commercial impact is indisputable. Increased number of tourists, from various cultures, also present challenges for destination management. Buckley et al. (2015) mention that some tourist groups, from countries with emerging economies, have no previous experience with some of nature or culture settings they can find themselves in. This is a problem for destination management regimes, which have assumed certain tourist behaviour, based on local culture. The expert panel in this research is in line with this assessment as, in the context of sustainability, point

out the importance of attracting tourists which can “*live up to sustainable standards*” (N20), when discussing how to reduce the negative effects of long distance increased tourists.

6.1.3 Sustainability and responsible travel

Sustainability and responsible travel were ranked the second most important trend in Norway, and fifth in Finland, in round two of the Delphi study, in terms of impact on commercial potential. In the combined results from round two, the trend ranked third. Furthermore, sustainability was revealed as by far the most prominent trend in Sweden in round one of the Delphi study in BIOTOUR. A Norwegian expert describes it as “*the ethical responsibility every business has to take care of nature and local cultures*” (N18). While a Finnish expert sees it as becoming an “*even more significant part of competitiveness in tourism business*” (F02). A Swedish expert states that “*responsibility is more and more becoming a part of this as a trend regarding the guests stronger and stronger will "to do right" and contribute*” (S04). The description, given by the experts, indicates that ecotourism is gaining popularity among tourist initiators in the three countries.

Ecotourism promotes responsible travel, which sees the environment and the well-being of the local population at a tourist destination, as equally important (Orams, 1995). The demand for ecotourism, in nature based travel, is expected to grow substantially in the coming years. The natural component of ecotourism resembles in many ways the concept of sustainable development (Dwyer et al., 2008). Environmental and social drivers are some of the factors which affect increased demand for sustainable and responsible travel. Climate change will affect which destinations tourists will see as preferable, and which will be less attractive. Environmental awareness is increasing and more affluent tourists are increasingly turning to more ethical tourism product and services (Dwyer et al., 2008).

Some of the challenges mentioned by the experts, with the concept of promoting sustainable tourism, is the pollution from the transport industry. It was even suggested by one expert that “*In a sustainable point of view, we should probably focus more on the close markets and not so much on the faraway markets like Asia*” (N05). This idea is supported by data presented in chapter 2.2.3.3 Sustainability and responsible travel, Aviation accounts for about 75% of the CO₂ emissions in tourism (Gössling et al., 2010). Crowd control in sensitive areas is also mentioned as an important element in achieving sustainability in the tourism sector.

The Finnish experts see a potential opportunity in using certifications to promote responsible businesses. They see it as an important factor for proving the environmentally friendly status of national tourism businesses. In a study by Budeanu (2007), on the idea that eco-labels and other tools designed to get tourists to choose responsible travel, it proved out that they seem to have a precious little effect on consumer behaviour, as the consumers were not motivated by these labels to change their behaviour. However, other studies point out that environmental awareness is growing, and the fact that current consumption behaviour neither sustainable environmentally or economically in the long term (Dwyer et al., 2008). Furthermore, the potential, of the nature based tourism industry, can only be realized with proper management of natural resources (Dwyer et al., 2008).

6.1.4 Health, fitness, and well-being tourism

In the combined results from round two, the trend called *health and well-being from nature experiences* ranked fourth and *physical activities in nature for health and fitness* ranked fifth. In Finland, they ranked third and first, respectively. Although there is a distinct difference between the two trends, explained further here below, they will be analysed under the same heading, as much of the literature applies to both trends. In this analysis, the interpretation is that *physical activities in nature for health and fitness* is the subject of physical healthiness; as fitness is most often related to physical condition and exercise (Dwyer et al., 2008). *health and well-being from nature* is then considered a subject of psychological healthiness, as wellness is in literature often correlated with one's psychological state, either with or without physical activity. In addition, studies have shown, that people dislike the thought of physical activity in correlation with the aim of travelling for wellness and well-being (Konu & Laukkanen, 2010).

When reading the Finish answers the Finnish experts have a big focus on the health aspect of nature based tourism. In addition to having two health-related trends on the top 5 list from round two, four experts out of 10 name health trends as most important of the most prominent trends they mentioned in round one. They experts mention that “*People want to live healthier and be in good shape*” (F05) and, while promoting nature based well-being, state that “*the mental and physical well-being effects of nature*” (F08) will be considered even more important in the future. Adding that health benefits of the forest will grow more popular. These statements are supported by Dwyer et al. (2008), which concludes that increased focus

on self-improvement will increase demand for tourist experiences related to health and well-being.

Among the drivers mentioned is the fact that the preventive benefits of nature based well-being has the potential to reduce healthcare costs on a national level. This will, therefore, increase the possibility of getting public support for product and service innovation development. It is also pointed out, that despite its potential for commercial opportunities, it can be difficult to find the right marketing group. The topic is covered by Konu and Laukkanen (2010), which conclude, that well-being and wellness tourist are likely to be affluent female, over 30 years old and highly educated. On the subject of physical activity, Elmahdy et al. (2017) mentions that both younger and older generations are increasingly seeking active holidays, but adds that travelling for sporting events is male-dominated.

With changing social values, the focus on health, wellness and fitness is increasing. An ageing population also contributes to growing demand for various health and wellness related products and services. The trend also relates to generally increased participation in sports, as some pursue better fitness and health. With increased urbanization, nature based wellness and well-being with being increasingly popular, as an escape from a stressful environment, for health benefits and preventive therapy (Dwyer et al., 2008; Elmahdy et al., 2017; Frost et al., 2014). There is more a growing trend of combining the practising of well-being for both soul and body, especially amongst tourists older than 50 years (Hjalager et al., 2015). Wearable gadgets give people an instantaneous objective measurement of their daily well-being, and can be beneficial for people and a driver for people to get a healthier lifestyle (Düking et al., 2017)

6.2 Analysis of trends which lack data from round one

The aim of the thesis is to identify the drivers, challenges and opportunities of the top trends impacting commercial opportunities, presented in part 1 of the results chapter, using the information gathered with an exploratory Delphi method. As data was missing for identifying these features for some of these trends, the following is an interpretation, based on literature review, to give an indication of the meaning behind the trends.

6.2.1 Personalized and exclusive experiences in nature

This trend is closely linked with the trend of increased international demand, as this demand could be partly driven by a growing middle class abroad, which will be able to afford a more luxurious lifestyle. One of the reasons named for increased demand for luxurious nature based tourism is social media. There is a strong ongoing trend in the world with influence through pictures on social media. A growing group of younger travellers, often called Millennials, have a personal urge to show to their followers their standard of living. In addition, there is a growing number of so-called influencers who make a living on social media. These influencers will share to their followers their travels and experiences, spreading the electric word of mouth, in a way that can both benefit themselves, with publicity and a bigger audience, and, if positive, their subject of exposure (Scott & Gössling, 2015).

The experience economy is described as both providing services and staging experiences in nature (Dwyer et al., 2008). As tourists get more travelled, they get more interested in unusual and authentic experiences, contra impersonal mass tourism. Furthermore, the social trend of individualism enhances the customers demand personal and exclusive experiences. The market is shifting from being service based on being an experience economy, because of tourists looking for deeper and newer experiences through an extensive collection of activities and people will increasingly have look for getting the best value for money (Dwyer et al., 2008; Dwyer et al., 2009; Elmahdy et al., 2017). Authenticity is also growing in popularity amongst the market group which is called millennials (Expedia, 2017).

6.2.2 Demand for remote and unique places

According to Virtuoso (2015), which specialize in luxurious travel, the main travel motive for the year 2016 was to discover and experience untouched and unique destinations. This account is based on a survey within a network of international luxury travel agencies. The report states that emerging popular destinations, among upscale travellers, are those who are “off the beaten path”, naming Iceland, a nature based tourism country, as an example. The trend does partly reflect the characteristics as the trend of personalized and exclusive experiences in nature. It emerges with increased individualism and the need for unique experiences, as well being the result of demand for more luxury amongst the more affluent tourists. It might also relate to increased urbanization as people seek to use their, highly valuable, leisure time to experience authentic and exclusive nature, far from the conventional

urban setting. Transportation technology and low-cost carriers, open up diverse possibilities for travelling to remote places (Elmahdy et al., 2017), although contradicting the notion of luxurious travel.

The challenge of this trend is that the electric world of mouth travels quickly, and destinations that are sought out as remote and unique can quickly become overcrowded as they get promoted through social media or other forms of massively accessible reviews (Elmahdy et al., 2017). This happens because of unsustainable growth of the destination.

6.2.3 Experience wild food (berries, mushrooms, game, herbs etc.)

This trend is related to the high focus on health among the Finnish experts. The trend is also related to experiencing local products and food, described in detail in chapter 6.1.1.

International tourists have been documented to especially value the healthiness and freshness related with Finnish local food, as the same time as the tourists struggled to identify local food products (Mynttinen et al., 2015). There is, therefore, the potential for further promoting these products. Furthermore, sustainable harvesting of local resources will present the tourists with an authentic experience of local food, which is appreciated by international tourists in Finland (Mynttinen et al., 2015).

6.3 Comparison of Norwegian, Swedish and Finnish top trends

When taking a closer look at the Norwegian trends, there is a distinct focus on outdoor activities, both adventure tourism and soft adventures, including cultural tourism. The content of all the trends are activity based experiences, both in summer and winter, and they happen both deep in the remote backcountry as well at the boundary of urban and natural spaces.

There is a lot of focus on commercially guided tours and developing related tourism products, allowing a bigger part of the tourist mass to participate in nature activities. Moreover, there is an emphasis on the importance of nature preservation, especially through maintenance and improved facilities, as well as the prospect of crowd control at popular tourist destinations.

There is also a hint of a more exclusive outdoor activity market opening, with big commercial potential.

The Swedish trends relate more to easy, soft outdoor activities, with easy access and available to everyone. This also includes cultural activities and rural tourism. There is an apparent

notion of an increased demand for exclusive and luxurious travel, which perhaps is more service and experience focused as well as especially aimed at affluent market groups.

What is a definite characteristic of the Finnish trends, is the focus on health, fitness, wellness and well-being. This is also reflected in the expert answers in round one, as well as Finnish studies and literature. The Finnish expert panel sees a big commercial potential in building the nature based tourism image of Finland on health and wellness tourism, and rural wellness tourism; connecting soft outdoor activities with certified nature based spas and treatments.

6.4 Further studies

This thesis is based on round one and two of the BIOTOUR Delphi study. As the study layout shows, see Figure 11, there is a round three planned. The aim of round three is to find a consensus of the results from round two the study, by asking the expert panels to reassess their answers, based on the mean score each trend received in round two – comparing the mean score of the expert group with their own personal score sheet.

Should the same trend end up in the top five list, then there is a lack of in-depth data for three trends. This info could be obtained by asking the expert panel for supplementary info about these specific trends.

7.0 Conclusions

Nature based tourism has been identified as one of the fastest growing sectors of tourism. This increased interest is driven by several global megatrends which can be categorized as economic, political, environmental, technological and social. They all play some part in increased demand for nature based services, activities and experiences in Norway, Sweden and Finland.

The top trends for Norway are experiencing local culture and products, sustainability and responsible travel, authentic nature and culture experiences, personalized and exclusive experiences and finally commercial guided tours and courses.

The drivers, challenges and opportunities of each trend have been analysed. The results show that the drivers are mostly increased general interest for nature based tourism, environmental awareness and a stronger economy. There is an overall concern about increased stress on infrastructure and that tourists won't experience the quality of service that they expect. The trends bring about many opportunities, as for example more jobs and marketing chances for smaller local vendors. More importantly, the experts see increased demand as a chance to shift focus towards more responsible practices and more sustainable tourist markets.

The overall emphasis of the Norwegian trends evolves around outdoor recreation. The trends range from simple soft activities, mostly in relation to local and authentic culture, to those who seek adventure tourism with guides and courses. In addition, the industry is aware of the importance of building up the market with sustainable development in harmony with both nature and local culture.

The top trends impacting commercial opportunities in Sweden, were increased international demand, nature experience and high-quality services and facilities, local culture and products, demand for remote and unique places and finally simple and easily accessible activities.

Some of the drivers mentioned by the experts were the need for modern tourists to reconnect with nature and to experience new things. The challenges pointed out by the experts were generally about the state of public infrastructure and distances from main tourist hubs to

nature activities. The expert panel saw increased tourist revenue as an opportunity for upgrading infrastructure and the prospect of more cooperation within the industry.

The overall focus of the Swedish trends seems to evolve around soft tourism, combined with high quality and luxury. Although not mentioned as a top five trend in round two, it is obvious from round one that the Swedish industry is also highly aware of the importance of sustainability and responsible travel, although they seem to value it as less important in commercial perspective.

For Finland, round two yielded physical activities for health and fitness, experience with wild food, health and wellness from nature experiences, increased international demand and finally sustainability and responsible travel.

The Finnish experts had a much higher focus on the health aspect than their colleagues in other countries, and mentioned increased health awareness as one of the drivers increased tourism, as well as general environmental awareness. The challenges mentioned were for example that the industry is vulnerable to the downturn in the world economy and general destination management of tourist traffic for maintaining the quality of service and experiences. The opportunities mentioned included upgrading of public infrastructure through increased tourist revenue and more specialized jobs in rural areas.

The overall focus of the Finnish trends revolves around health, both physical and psychological, combined with soft activities, sustainability and responsible travel.

There appears to be a distinct difference between the trends of the three countries. Although all three have a high emphasis on nature based tourism, all have a different focus. Norway with a high focus on outdoor recreation, Sweden on luxury and soft adventure and Finland on health and wellness.

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Appendix A

Most important trends in Norway, Sweden and Finland combined

Rank	
1	Experience local culture and locally produced products, food etc.
2	Increased international demand
3	Sustainability and responsible travel
4	Health and well-being from nature experiences
5	Physical activities in nature for health and fitness
6	Simple and easily accessible activities (soft adventure)
7	Personalized and exclusive experiences in nature
8	Commercial guided services or courses in nature
9	Nature experiences combined with high quality facilities and services
10	Learning and new experiences in nature
11	Demand for remote and unique places
12	Sports/ activity-oriented nature-based experiences
13	Package tours that combine products and services
14	Authentic nature and culture experiences
15	Experience iconic nature-based environments/places/ trails
16	Experience pure nature environments
17	Nature experiences near cities
18	Organized events, competitions, adventures in nature
19	Digital marketing, trip planning, and booking
20	Activities and experiences in Arctic nature
21	Experience wild food (berries, mushrooms, game, herbs etc.)
22	Urban demand for new outdoor experience products and services
23	Increased government funding for nature-based tourism, recreation and public lands
24	Electronically shared nature experiences (for example social media)
25	Product customization for different markets
26	Demand for improved infrastructure and public transport
27	Increased demand in the winter season
28	Increased cooperation across landowners
29	Visit nature without online services (digital detox)
30	Shorter vacations and stays in nature
31	Digitally enhanced nature experiences (augmented reality)
32	Modern architecture/ facilities in nature
33	Diversity of activities leads to conflict and requests for separate opportunities
34	Lack of youth engagement in outdoor recreation
35	Management challenges with increased use (crowding, conflict, ecologic impact)
36	Decreased public funding for public land management

Most important trends in Norway

Rank	mean	+3	
1	2,3	9	Experience local culture and locally produced products, food etc.
2	2,1	7	Sustainability and responsible travel
3	1,9	8	Authentic nature and culture experiences
4	1,9	6	Commercial guided services or courses in nature
5	1,9	5	Personalized and exclusive experiences in nature
6	1,8	6	Increased international demand
7	1,8	5	Nature experiences combined with high quality facilities and services
8	1,8	4	Nature experiences near cities
9	1,8	3	Learning and new experiences in nature
10	1,7	5	Simple and easily accessible activities (soft adventure)
11	1,7	3	Health and well-being from nature experiences
12	1,6	4	Experience pure nature environments
13	1,6	2	Sports/ activity-oriented nature-based experiences
14	1,5	3	Physical activities in nature for health and fitness
15	1,5	3	Increased cooperation across landowners
16	1,5	3	Organized events, competitions, adventures in nature
17	1,5	2	Digital marketing, trip planning, and booking
18	1,5	2	Demand for remote and unique places
19	1,5	3	Experience iconic nature-based environments/ places/ trails
20	1,5	1	Increased demand in the winter season
21	1,4	4	Activities and experiences in Arctic nature
22	1,4	1	Package tours that combine products and services
23	1,3	3	Increased government funding for nature-based tourism, recreation and public lands
24	1,3	2	Demand for improved infrastructure and public transport
25	1,3	0	Urban demand for new outdoor experience products and services
26	1,2	3	Electronically shared nature experiences (for example social media)
27	1,2	2	Product customization for different markets
28	1,2	1	Modern architecture/ facilities in nature
29	1,1	3	Shorter vacations and stays in nature
30	1,1	0	Experience wild food (berries, mushrooms, game, herbs etc.)
31	0,9	2	Visit nature without online services (digital detox)
32	0,7	0	Digitally enhanced nature experiences (augmented reality)
33	-0,1	0	Diversity of activities leads to conflict and requests for separate opportunities
34	-0,5	0	Lack of youth engagement in outdoor recreation
35	-0,9	1	Management challenges with increased use (crowding, conflict, ecologic impact)
36	-1,5	0	Decreased public funding for public land management

Most important trends in Sweden

Rank	Mean	+3	
1	2,3	12	Increased international demand
2	2,3	10	Nature experiences combined with high quality facilities and services
3	2,3	9	Experience local culture and locally produced products, food etc.
4	2,3	9	Demand for remote and unique places
5	2,2	9	Simple and easily accessible activities (soft adventure)
6	2,2	11	Personalized and exclusive experiences in nature
7	2,2	7	Health and well-being from nature experiences
8	2,2	6	Physical activities in nature for health and fitness
9	2,1	7	Commercial guided services or courses in nature
10	2,1	7	Digital marketing, trip planning, and booking
11	2,1	6	Sustainability and responsible travel
12	2,1	6	Experience iconic nature-based environments/places/ trails
13	2,1	6	Organized events, competitions, adventures in nature
14	2,0	6	Urban demand for new outdoor experience products and services
15	2,0	9	Package tours that combine products and services
16	2,0	6	Authentic nature and culture experiences
17	2,0	6	Electronically shared nature experiences (for example social media)
18	1,9	4	Learning and new experiences in nature
19	1,9	9	Shorter vacations and stays in nature
20	1,8	9	Demand for improved infrastructure and public transport
21	1,8	2	Sports/ activity-oriented nature-based experiences
22	1,7	5	Experience pure nature environments
23	1,7	5	Nature experiences near cities
24	1,6	5	Product customization for different markets
25	1,5	4	Increased cooperation across landowners
26	1,5	2	Activities and experiences in Arctic nature
27	1,5	2	Experience wild food (berries, mushrooms, game, herbs etc.)
28	1,4	5	Increased government funding for nature-based tourism, recreation and public lands
29	1,4	1	Visit nature without online services (digital detox)
30	1,3	4	Modern architecture/ facilities in nature
31	1,3	1	Digitally enhanced nature experiences (augmented reality)
32	1,2	5	Increased demand in the winter season
33	-0,4	0	Diversity of activities leads to conflict and requests for separate opportunities
34	-1,0	0	Management challenges with increased use (crowding, conflict, ecologic impact)
35	-1,3	0	Lack of youth engagement in outdoor recreation
36	-1,4	0	Decreased public funding for public land management

Most important trends in Finland

Rank	Mean	+3	
1	2,4	4	Physical activities in nature for health and fitness
2	2,3	4	Experience wild food (berries, mushrooms, game, herbs etc.)
3	2,2	4	Health and well-being from nature experiences
4	2,2	3	Increased international demand
5	2,1	3	Sustainability and responsible travel
6	2,1	3	Activities and experiences in Arctic nature
7	2,1	3	Package tours that combine products and services
8	2,1	2	Simple and easily accessible activities (soft adventure)
9	2,1	4	Increased government funding for nature-based tourism, recreation and public lands
10	2,0	2	Experience local culture and locally produced products, food etc.
11	2,0	2	Sports/ activity-oriented nature-based experiences
12	2,0	4	Commercial guided services or courses in nature
13	1,9	3	Learning and new experiences in nature
14	1,9	3	Experience pure nature environments
15	1,9	2	Personalized and exclusive experiences in nature
16	1,8	3	Product customization for different markets
17	1,8	1	Experience iconic nature-based environments/places/ trails
18	1,7	3	Demand for remote and unique places
19	1,7	3	Nature experiences combined with high quality facilities and services
20	1,7	2	Increased demand in the winter season
21	1,7	2	Organized events, competitions, adventures in nature
22	1,7	0	Nature experiences near cities
23	1,6	3	Digitally enhanced nature experiences (augmented reality)
24	1,6	2	Digital marketing, trip planning, and booking
25	1,6	2	Urban demand for new outdoor experience products and services
26	1,6	1	Electronically shared nature experiences (for example social media)
27	1,6	1	Demand for improved infrastructure and public transport
28	1,4	2	Visit nature without online services (digital detox)
29	1,4	1	Authentic nature and culture experiences
30	1,0	0	Increased cooperation across landowners
31	0,8	0	Shorter vacations and stays in nature
32	0,4	0	Modern architecture/ facilities in nature
33	-0,2	0	Diversity of activities leads to conflict and requests for separate opportunities
34	-0,7	0	Lack of youth engagement in outdoor recreation
35	-1,0	1	Management challenges with increased use (crowding, conflict, ecologic impact)
36	-1,6	0	Decreased public funding for public land management



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