

### WHAT'S NATURAL & UNIQUE



The longing for nature, countryside and what's simple and healthy is more than ever in focus, partly as a backlash against our technological age and "always online" society.

Rurbanity (the combination of Rural and Urban) is an increasingly strong trend where people cultivate plants and vegetables on their balconies, where more people visit farmers' markets and work with handicrafts.

This green wave is about nature being brought into the city, rather than people migrating to the countryside. Suburban municipalities are growing most in Sweden. Traditions and authenticity are increasingly important in a society which is fast paced and where changes occur daily.

People discuss phenomena such as "digital detox", disconnecting from social media extensively, and a new need for JOMO (the joy of missing out) is becoming more prominent.

In the future, nature will play an interesting role when combined with personal development. Nature helps reduce the risk of depression and mental illness. In Japan, forest baths are prescribed as an alternative medical treatment.

In this context, nature experiences become more valuable both by providing a natural and unique experience, and by having a potentially positive effect on an individual's health.

#### **What's natural & unique**

- A longing for nature, the countryside and a healthy lifestyle
- Digital disconnect – a desire for rurban (rural + urban)
- Bringing the countryside into the city
- Nature's positive effects on recovery
- Nature's beneficial effects for a healthy, balanced lifestyle



## WHAT DEVELOPS



Western societies tend to focus on the individual rather than the collective. Individuals like to focus on self-realization and development through a sense of lifelong learning.

Experiences and new knowledge are perceived as unique and valuable. One way to include learning in the experience is gamification, the use of game-thinking and game mechanics to engage users in learning, solving problems, improving systems, and making measurements.

Gamification is often successful as reward mechanisms in the brain are stimulated and the process is perceived as fun and playful rather than as a "work". This leads to strong emotions and a lasting impression.

Future tourist experiences will be developed by adding a dimension of self-development and acquiring new knowledge connected to the experience.

### What develops

- Self-development and knowledge tied to experiences
- Gamification as a means of acquiring new knowledge and experiences



## WHAT BRINGS US TOGETHER



In an increasingly fragmented and hectic world, humans need contact with people around us. Community and a sense of togetherness is making a comeback. Younger generations in Sweden say they value stability and family life more highly than previous generations.

Family cohesion is prioritized as highly as security at the top of the needs-pyramid.

A sense of belonging and tradition become increasingly important in a world where we leap between different places of residence, jobs, partners, roles and identities.

In Kairos Future's study "World-class experiences" several responders mentioned that their "best tourist experiences" were where the common denominator was experiencing together with someone else; family, friends or other people with similar interests. One's tribe. Experiences that are attractive will feed into this need for togetherness.

### **What brings us together**

- A sense of belonging – tribes
- Counter reaction where tribes, traditions and culture become important
- Powerful experiences together with family, friends or tribes



## WHAT RELAXES YOU



A Future Travel Trend Report shows that experiences focusing on relaxation and disconnecting top the list of reasons for travel.

Unplugging is about taking a break from everyday life and recharging your batteries. In a long-term study of Swedish citizens, the interest in "rest, doing nothing" has increased most, from 21% in 1970 to 57% in 2017. The study also shows that people value their time and energy ever higher, and that doing things slowly by taking your time has become a luxury in a fast-paced society.

### **What relaxes you**

- Relaxation and recharging your batteries as a main driver for tourism
- Time and energy are valued highly – taking your time and relaxing is a luxury

## WHAT DISRUPTS



## Speculative Trends



Start-ups and established players from other industries are entering the growing tourism market. They bring new solutions and other assets, such as new technology or new customer segments and break the usual patterns and rules of the game.

One example is the newspaper Dagens Nyheter, which captured their reader base's interest in train travel as a reaction to climate change anxiety by arranging train trips through Europe as part of its services.

We also see major players like Google taking over booking functions in Google Maps, or Airbnb challenging traditional tour operators. An analysis of the tourism industry shows a potential for disruption and to be influenced by different actors.

We will probably see more players identifying the needs of the traveller and delivering smarter solutions than those currently available.

Professor Thales Teixeira at Harvard Business School believes that there is a recipe for disruption and that it comes down to value-creating and value-destroying activities. These are where you identify points where the customer is not completely satisfied, where potential change can take place, where customers would rather choose a new, better solution.

Often it is about reducing one of three costs: money, time or energy. This is usually done through new business models or technologies. But customers are the bearers of change. Often, it is the same people who use new solutions in one industry, who see new opportunities in another. That makes it difficult for business executives to predict a shift in consumer behaviour in their own industry.

### What disrupts

- Actors from one industry providing solutions to challenges in another industry (Netflix, Spotify)
- Moving away from old patterns and rules
- Customers choosing a new and better solution offered to them
- New tech and/or new business or service models

## WHAT IS INDIVIDUAL



We expect services and products to enable us to do what we want, how we want it, when we want it, wherever we are.

The development of the smartphone is a crucial part of this. It has changed purchasing and consumption behaviour, especially when it comes to experiences. New apps and features allow for an individualized buying process and consumption of an experience.

New technical tools such as voice control, wearables and smart homes are shaping the future buying process. Long-term surveys show that despite the advancement of technology, few individuals perceive that development is moving too quickly. We have learned to appreciate the benefits that technology offers us in everyday life.

By 2030, we will see an increase in the use of customer data and artificial intelligence to create personalized experiences when you book your hotels or make a reservation at a restaurant.

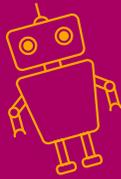
We can see examples of this today. Nordic Choice together with VR researchers from KTH are experimenting with windowless rooms where guests select their surroundings.

Consumers will probably become more accustomed to personalized buying processes and experiences in everyday life, which will affect expectations of travel experiences.

### What is individual

- A shift in patterns of consumption – choice
- Individual and tailored experiences when travelling
- Voice control, wearables, Internet of Things
- Customer data and artificial intelligence

## WHAT IS AUTOMATED



The limits of what is possible to automate are constantly being redefined. This applies to physical services – lawnmowing, vacuuming and self-scanning – as well as cognitive services such as travel booking, e-commerce and banking.

Machine learning will influence physical and digital workflows. Analysis of the labour market and the prospects for automation show that more than half of the available jobs today could be automated by 2030.

According to trend forecasts, 25-60% of traditional jobs in the hotel and restaurant industry in Sweden have the potential to be automated by 2030. This opens up for new kinds of jobs such as AI trainers and experience designers. The aspiration is that tedious and dangerous jobs can be automated so that people can spend more time on creative and social tasks.

### What is automated

- 50% of today's jobs could be automated by 2030
- 25–60% of traditional jobs within tourism will disappear by 2030
- Experience-designer and AI trainer
- Focus on the use of creative and social skills in jobs



## WHAT IS HASSLE-FREE



When we are on holiday we want everything to flow smoothly. Holiday is the only time when we can spend real quality time with the family. Because this time is so valuable, our tolerance for hassle and unnecessary waiting is very low.

You want everything to flow smoothly and you want a maximum amount of experiences or relaxation per unit of time. We now see examples of many companies offering smoother check-in or priority boarding for airplanes for a fee.

Valuing our time and energy reserves higher are strong drivers that make us willing to pay more money for a seamless experience.

### **What is hassle-free**

- Precious quality time with family and friends
- Tolerance for errors and waiting time is low
- Smooth experiences with maximum relaxation per time unit



## WHAT IS DESIGNED



Attractive design is becoming an increasingly important competitive factor. It is no longer enough to compete with function alone, the experience itself creates attractiveness.

Designing an experience that remains strong in a tourist's memory is about including all the different human senses. Aesthetics become an important part of the experience.

Beautiful or odd buildings and places can be a reason for travelling by themselves. An example of when design can be an attractive force is Arctic Bath, being built in the municipality of Boden. The building is a floating sauna with cold bath houses and hotel rooms that look like a collection of timber logs. Although the hotel is not expected to open until December this year, there is already an international interest and they are fully booked before opening.

### What is designed

- Function + experiences = attractive as an experience
- Experiences engaging all human senses
- Purchasing products or experiences?



## WHAT IS EMERGING MARKETS



It is important to understand that as we grapple with “flygskam” – the shame of flying – in Sweden, emerging growing markets relatively recently received access to the luxury of travelling.

In Sweden, bragging about trips abroad has been replaced on social media by bragging about climate friendly trips by train across Europe. But it seems that the rest of the world doesn't share this opinion.

The middle class of emerging markets who now can afford to travel want to discover new, exotic places and aviation is the most efficient mode of transport. Sustainable transport is one of the focus areas of Agenda 2030 and although future travel restrictions and incentives can lead to a slowdown in certain markets, travel is likely to continue to increase by 2030, albeit with new, more sustainable modes of transport and to more sustainable destinations.

### **What is emerging markets**

- New, rising middle classes in China and India
- “Flygskam”, the shame attached to flying inside of Europe
- Travelling = status symbol



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