VISIT ARCTIC EUROPE

Disoriented Travellers or Disoriented Destinations?

– An analysis of future travel trend studies for Visit Arctic Europe project

Visit Arctic Europe project
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Foreword

Travellers arriving in Northern Scandinavia are interested in experiencing wilderness-type nature and indigenous culture. Hence, the borders between the three countries are not important for international travellers. After years of preparation, tourism actors from the region began a common project to enhance international tourism. Visit Arctic Europe (VAE) project is conducted by the Finnish Lapland Tourist Board, the Northern Norway Tourist Board and the Swedish Lapland Visitor Board and is financed by Interreg Nord for the years 2015–2017. Both the public sector and 90 tourism companies are involved in the project.

The aim of the project is to develop Northern Scandinavia into a cross-border, high-quality tourist area that is an internationally competitive and well-known destination. The project focuses on tourism marketing, joint product development, and improvement in accessibility. In order to ensure the efficiency of the project in line with the established objectives, stakeholders need analyses and updated information on the following four R&D missions: relevant indicators and measurement tools for the success of the VAE project, analysis of future travel trends, digital trends in tourism and customer digital and mobile behaviour, and obstacles to cross-border cooperation in the area where VAE is represented.

In this second report, commissioned by the project, researchers from the Multidimensional Tourism Institute (MTI), University of Lapland, explore future travel trends and their impact on Arctic Europe as a tourism destination. Due to the challenges and opportunities that the future may present for the tourism industry, it is impossible to know what will happen in future. In this report, future trends for next 10 years are examined in order to discuss the possible long-term changes in tourism that are relevant for the Visit Arctic Europe project.

We hope you enjoy reading the report and we encourage you to join the discussion regarding the future of tourism in Arctic Europe.

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Introduction

In future, travellers arriving in Arctic Europe are expected to represent diverse backgrounds — their cultural views, generational habits, and previous experiences become remarkably differentiated. In this report future travellers are referred to as *disoriented* travellers. The aim of this is to identify and acknowledge that major changes will take place in future tourism due to the diversification of travellers. Disoriented travellers have not yet adopted routinized ways of travelling and of using tourism services — they are testing and searching for their typical travelling practices. Disorientation may even become a way of travelling for some, whereas others will form more permanent ways of travelling once they gain more experience of it. Because of the disorientation of travellers, we face a time when the destination becomes unimportant; it only needs to provide an interesting and relevant framework, platform, and application for the traveller's narration and self-actualisation. Therefore, we are in a situation where both travellers and destinations may become disoriented. To avoid chasing fluctuating markets, destinations need to take a stand and decide what kind of future *they* want.

In this report, a selection of existing future travel trend studies[1] is analysed and a summary based on findings is created. The summary highlights findings that are relevant for the Visit Arctic Europe (VAE) project. The aim of the report is to assist with the development and marketing of cross-border tourism packages and to stimulate discussion on the future of tourism in Arctic Europe.

Results are based on an analytical reading of the studies listed in Appendix 1. After reading the studies, the content was thematised into 14 preliminary themes. Following discussion, evaluation, and refining, four themed categories emerged: *Disoriented Travellers; Responsible Wellness; Mobile, Sharable Living;* and *Sharing Economy*. These categories have been further analysed by using the interests of VAE project as an analytical tool. Thus, analysis was guided by the following questions:

1. What are the likely future changes in consumer behaviour?
2. What will be valued in the future?
3. How can the answers to the above questions be interpreted in the context of Arctic Europe as a tourism destination?

In future, the blurred nature of work and leisure or relaxation will increase and this accounts for the resulting four categories that focus on all travellers — they are not devoted to business or leisure travellers nor to travel for a specific purpose, such as sport tourism, wellness tourism, city tourism, or nature tourism.

In this report, the four categories describing the long-term global development paths in consumer behaviour are presented by using the structure of the three questions listed above. The report concludes with a discussion of how to use the results.

[1] The collected data consists of trend studies focusing on tourism, travel, or the hospitality industry. The data collection was limited to freely accessible reports written in Finnish, Swedish, Norwegian, or English, and published between 2010 and June 2016. Furthermore, digital trends in tourism are explored in a limited way in this report because of the different assignments given by the VAE project — a separate report focusing on digital trends in tourism and customer digital mobile behaviour will be published next year.

Disoriented Travellers

Even though fertility rates are beginning to decline, the world's population is growing: there are now more than 7 billion of us and it is estimated that by the year 2030 there will be more than 8.5 billion people in the world. While population grows, it also becomes older. Life expectancy is increasing and people aged 60 or over form the fastest growing sector of the population: by 2050, in all major areas of the world except Africa, it is expected that something in the region of a quarter or more of the population will be aged 60 or over (UN 2015, xxix). Most people live in urban regions. Due to migration, dual-citizenship, overseas students, and overseas holiday-home owners, national, ethnic, and religious groups have become more intercultural. Cultures cross-fertilise and the world seems smaller than before. The increased movement, especially in Asia, toward industrial society generates a rise in income: the middle classes are increasing and in the future, people will have more money to spend on education, insurance, and travelling.

Who are the travellers?

Due to changes in the demographic landscape, travellers are becoming more distinctive. Travellers come from a wider spread of nations and in the future there will be more travellers from Asia and, over a longer period, from Latin America and Africa. The arrival of emerging markets will give rise to questions concerning the impact of diversification of markets. Apart from new geographical markets, diversification will also increase in terms of generations and gender. For example, the influence of millennials is important. Furthermore, in the Indian travel market, for example, the female Indian business traveller is amongst the most significant growth segments (Frost & Sullivan 2013a, 7). It is also estimated that in 2020 a quarter of all tourists visiting Europe from Asia will come from China. Chinese tourists are not just passive holiday-makers, but turn into active holiday-makers interested in physical activity in traditional, prestige-founded activities near to classic sites (Z_punkt The Foresight Company & TUI Think Tank 2012). Millennials, born between 1982 and 1999, have grown up with the internet, social media, and smartphones. They have a strong sense of self-empowerment and rather than idealising traditional life stages, such as marriage or taking out a mortgage, they value the enrichment of life through travel (Expedia 2016).

Increasing numbers of middle class people will enter the travel markets, especially from China and India: when salaries increase expectations grow and brand awareness changes. However, it is difficult to anticipate the needs of new travellers from emerging markets. For example, they may be willing to pay for expert services to present them with choices and to help in decision-making related to travel. At the same time, whilst being in the midst of a foreign culture they may demand services that are familiar to them, for example, a restaurant of their own culture at the destination. Travellers' consumption behaviour is no longer dominated (and can thus be anticipated) by western ways, but is influenced more by eastern and southern attitudes, prestige, and routines of consumption.

Thanks to better medical treatment and living conditions people are living longer and spend a greater proportion of their life in good health. However, when travelling, age is no longer the essential factor, what matters more is self-actualisation. Tourism services should not be categorised according to age — seniors or youths — but according to themes based on interests and motivation.

In the future, both consumers and their behaviour will become highly diverse, put simply, there will be the older, educated western mature market and market segments that come from very diverse cultural backgrounds. Diverse and multidimensional values will appear in travel practices and in the definition of travelling in future. The routines of holiday timing will perhaps also be questioned: will schools have their holidays at the same time? Could we have unlimited paid holiday? How will corporates build the combination of business and leisure travelling practices more effectively into their travel policies? We will also confront diverse interpretations for travelling that question the meaning of travel, who has the right to travel, and to where. Up to today, the western way of defining a holiday, as an attractive holiday destination and preferred holiday activities, has dominated business logics and provision of tourism services.

Diversity in consumer behaviour makes future travellers disoriented. Disoriented travellers have not yet adopted routinized ways of travelling and using tourism services — they are testing and searching for their typical travelling practices. They may not be selective when choosing the destination, and prior to travelling they may not bother, or want to find out about the destination and its requirements. The period when we could rely on bookings for homogenous groups requiring similar services, diets, and preferences will be replaced by individual travellers with intercultural backgrounds, diverse values, and very limited knowledge of the destination and circumstances there.

What is valued in relation to disoriented travellers?
Diversity, self-actualisation, boldness, and actualisation of right to travel.

Disoriented tourists in the context of Arctic Europe

Destinations need to acknowledge that travellers will become increasingly diverse and will not share set perceptions on how to operate in the destination. Diversified, new customer groups need personal guidance and increased variation in curated opportunities for searching and finding experiences. Travellers' limited knowledge and understanding, and sometimes a total lack of awareness of local circumstances in the destination places greater responsibility on tour operators, tourism entrepreneurs, and destination platforms to provide vital information needed for travelling (e.g. language translation, location and opening hours of the closest grocery shop, appropriate clothing in winter). The destination must be ready to welcome disoriented travellers: in parallel with value and motivation based categorisations, demographically sensitive tourism knowledge should be increased and services adjusted to meet diverse cultural needs. Conveying a welcoming attitude to diverse markets is important for Arctic Europe, where traditional markets (western travellers from Great Britain, Germany, and France, for example) still form the core business.

The intercultural background of travellers sets challenges for the attractiveness of the destination. People who are born in one country, who have studied in another, and have married a dual-citizen from a third country, do not share the sense of uniqueness and locality of mature markets. It is crucial to constantly reflect on the attractiveness of Arctic Europe as a destination. At the same time, there is a constant need for open and honest discussion about what tourism services we want to provide and whether they go hand in hand with our Arctic European way of living, or if travellers' preferences are dominating our range of services, land use, and planning. For example, do we need to provide motor-based activity in the summer simply because travellers are used to seeing snowmobiles in our winter products?

Responsible Wellness

In context of tourism, wellness is associated with taking care of, and even pampering, travellers spiritually, mentally, and physically. For many travellers, wellness means easy, hassle-free, and smooth travel experiences that offer the potential to recover from hectic everyday life and that enhance their own sense of wellbeing and that of those closest to them. Wellness is realised in tourism in diverse ways depending on travellers' personal ideas of wellness. For some travellers, up-market experience in a luxury spa presents wellness, whereas others may achieve a sense of wellness through living like a local and using peer-powered local services, such as couch surfing. The actualisation of wellness — as a spiritually, mentally, and physically recovering experience — can be illustrated by placing it along the continuum of various spectrums: wellness may mean luxury or budget travelling, personal VIP service or self-service, sleeping or adventuring, niche or mass tourism, and customised home comforts during their journey or being totally away from home.

Whose wellbeing?

By defining and realising wellness in personal ways, travellers hunt social rewards, which are verified by respective social environment. Thus, different forms of old and new luxury intermingle in the hunt for wellness, such as combining accommodation in five-star hotels with personal guiding in wilderness huts. Consumers' quest for rewards can be illustrated according to two consumer types, which in simplified forms present two polarised ends of one continuum: the *ethical consumer* and the *egoistic consumer*.

The ethical consumer is concerned about both his or her own wellness and also that of the social and natural environment. Ethical consumers are interested in improving their own lives, but also in understanding the impact of their choices on the world. Ethical consumers are sensitive to unfair practices and will challenge those they do not agree with. Proactive transparency, such as access to quality information and brand reviews, is important and demanded. Ethical consumers need time to make decisions and they prefer to plan in order to be sure of the ethical, environmental, and political consequences of their purchase and actions. The wellbeing of the ethical consumer is not diminished by the sacrifices made to improve the wellbeing of others and of nature.

The egoistic consumer focuses on rewarding him/herself. In order to continue in everyday hectic working life, this consumer needs regular rewards to retain physical and mental balance. Egoistic consumers are responsible for their own wellness, not for that of anyone else. They are interested in marketing promises that offer recovery and in products that offer possibilities to perceive and measure the impact of recovery on their own body and mind. Egoistic consumers may change their plans spontaneously if the results of their personal data monitoring (e.g. a sleep tracker) are not satisfying or if a new marketing promise catches their attention. The egoistic consumer invests in better health and in efficient time-use; for the egoistic consumer wellness means mental and physical self-improvement.

Both consumer types are driven by the quest for prestige, which they want to gain in their respective social environments. Wellness is about self-determination and self-actualisation, which is recognised and verified by peers. The role of peers is important, especially for egoistic consumers. Where the egoistic consumer is focused on rewards gained through "the wellness of me", the ethical consumer is more focused on what rewards "the wellness of us" could offer him/her. The ethical consumer wants his/her morality to be acknowledged by friendship networks, but also by brands. Hence, the ethical consumer promotes transparency of business and engages more deeply in enhancing the wellness of the destination.

What is valued in responsible wellness?
Self-actualisation, self-betterment, stress-free, hassle-free, smoothness, ethical, and different forms of new and old luxury.

Responsible wellness in the context of Arctic Europe
Responsible wellness is concerned with the practices of both travellers and service provides, which aim to improve either just the traveller's wellbeing or also the wellbeing of tourism businesses economically, socially, culturally, environmentally, and politically. To be responsible, a holistic approach on wellness should be a permanent part of the practices of both travellers and destinations.

From the point of view of the destination, wellness will not be deemed to be responsible if the focus is solely on the recovery of the travellers. Spiritual, mental, and physical recovery should also be part of the everyday lives of local people in the destination. From time to time the wellness required by travellers might be incongruous with the rhythms of the local environment. Travellers expect the immediate and continuous availability of tourism service providers, but how can we also ensure privacy and recovery time for locals?

By taking a stand on what wellness means for the destination and for the locals living in the region, the destination also enhances its own wellness in a responsible way. Responsible wellness encourages destinations to provide tailored and efficient tourism services whilst simultaneously reacting in a responsible way to travellers' demand for wellness.

Mobile, Sharable Living

Mobility is a part of everyday life in the era of digitalisation — and connectivity is a lifestyle, not a facility. Therefore, the need for easy access to free internet, or at least reasonably price internet, is taken granted and smartphones means convenience and control over life. The world is approached as a wealth of stories that are just waiting to be told, shared, visualised, and commercialised. Constant multi-sensorial and image-driven inspiration is a norm in today's world. This norm especially present among millennials who are optimistic about future-facing technology and have an unshakeable faith in it even though they do not fully know how it works. Mobile, sharable ways of living facilitate and influence tourism in many ways: they inspire, inform, and enhance experiences, make differentiation possible, and create new streams of revenue.

How to personalise services?

Travellers use a wide variety of mobile digital services to increase the self-management of travel, to facilitate purchase, and to upgrade experiences. Contextualisation and personalisation are the keys to the mobile world, providing an opportunity for communication among travellers, and among travellers and tourism businesses through limitless touch-points. Mobile digital services provide opportunities to reduce uncertainty and to enhance the wellbeing of travellers, which corresponds with travellers' interests and makes travelling a smoother and less stressful experience. Travellers also demand an active social media presence and a diverse selection of mobile digital services from tourism businesses and regions. In future, tourism companies will be expected to provide personalised mobile services. Consumers assume that if an application that is needed does not exist then it will be created. At the same time, the demand for instant contact is increasing: instant customer service via messaging or face-to-face is a standard practice.

Travellers' willingness to invest in their self-actualisation creates demand for brands to know the travellers better than they know themselves. Personalisation means finding a balance, on the one hand between the thirst for search and discovery and, on the other hand, between time-anxiety and the desire for a smooth travel experience: how many suggestions can be offered for activities in the location without ruining travellers' pleasure in find them by themselves?

Personalisation that creates value for both travellers and brands requires the effective collection and use of personal data from social media channels, location-based mobile services, and health tracking systems, to mention just a few. Not all travellers are ready to share their private preferences and this raises many issues concerning privatisation and information security that are discussed in relation to the different levels of personalisation. For example, providing detailed information on demography, location, travel history, complaints, or shared content, as a basis for pricing feels uncomfortable, or even discriminative for some of the travellers. Others do not want their past experiences or preferences to guide their future plans and to function as the basis for personalisation. Some travellers value a lower level of personalisation, even though this increases variety and flexibility in the range of service and requires time and effort to make choices.

In mobile lifestyle, sharing is important: travellers are constantly connected to their peers, destinations, and brands. Travellers construct their stories by using information about themselves that others might find interesting. Hence, social media tools are above all about storytelling. Brands create their brand and engage travellers in their work, thus enabling travellers to become not only service users or promoters, but also partners. Travellers sell, recommend, criticise, and communicate about brands — but not for free; they expect to be rewarded (e.g. upgrading, fare discounts) by the brands.

The use of social media for a transaction and a booking, in parallel with storytelling, is a natural development path and its significance will increase.

However, there are counter trends to continuous connectivity and lifestyles that emphasise mobility and the sharing impact on traveller behaviour. People are used to mobile digital services in their everyday life and are eager to use services to enhance their travelling. However, they do not want to be slaves to technology and to live in the virtual world — they want to be present in the moment. Travellers want the choice of level of connectivity to be available to them. The need for curated experiences without connectivity or declined connectivity is also present: sometimes travellers need guidance on how to live without mobile devices. Even though digital technology provides opportunities for self-serviced personalisation, it never completely negates the role of human services in tourism. Some travellers still strongly prefer human interaction rather than mobile applications. Unwillingness to use mobile digital services may stem from a general suspicion of technology: systems are complicated to use, privacy is lost, cyber threats increase, and there is a possibility of health risks caused by the radiation from the devices.

What is valued in mobile, sharable living?
Community, connectivity, aesthetic, visuality and narrative, self-management, personalisation

Mobile, sharable living in the context of Arctic Europe

In the near future, traveller behaviour will not change much from the present situation — although the significance of mobile and sharable lifestyle will increase in tourism. Destinations, however, need to change in order to face the needs and wishes of travellers. Based on the findings, it is argued here that the destination is unimportant – as long as it provides an interesting and relevant framework, platform, and application for travellers' narratives and self-actualisation. For the mobile travellers it is the story that is most important. The task for the destination is to create an inspiring, aesthetic story, which travellers will want to share.

Providing sharable, coherent stories requires the continuous development of collaboration among the actors in the destination and the development of know-how in digital technology. Tourism businesses need to be trained to provide offers, to cross-sell, and to respond to complaints on different mobile digital service platforms. Physical infrastructure needs digital infrastructure to be able to provide services that differentiate travel experiences. For mobile digital services to enhance the travel experience and to be advantageous to tourism businesses, increased confidence in connectivity, stable platforms and applications, and secure devices are required.

The Sharing Economy

Environmental pressure, turbulence in economic situations, and the long for human contact push people to collaborate. The increase in social networking and the development of payment systems through mobile devices facilitate the appearance of new models of collaborative consumption. One such rapidly growing economy is the sharing economy. The sharing economy refers to a set of practices, models, and platform that use technology and community to allow individuals to temporarily share access to products, services, and experiences, peer-to-peer, either non-profit or for-profit. Although the sharing economy is present in several fields, the most well-known global cases are related to the tourism sector, more specifically to accommodation (e.g. Airbnb) and local transport (e.g. Uber). In the global tourism economy, the sharing economy constitutes around one per cent of its value. However, its growth is even more impressive with an almost 50 per cent increase in 2014 compared with 2013 (European Parliament 2015, 22). As a new form of business, the logic of the sharing economy disrupts the existing owner-based economy and challenges tourism actors to consider the changes, the potential, and threats it may engender.

Can we shape the sharing economy?

Current information on the impacts of the sharing economy is still scattered and incomplete. It is difficult to imagine what the future of collaborative consumption in tourism might look like. How will mobile digital services develop? How will the dematerialisation of our society develop? Who will we trust in the future? How will low-cost travel develop? As travellers and tourism service providers, what will our attitudes be to the logic of the sharing economy? How will the regulations for the sharing economy in tourism develop? So far, there is too little empirically based evidence to make any general conclusions about the impacts. However, some suggestions related to future changes in consumer behaviour caused by the sharing economy may be proposed.

Travellers' interest in the sharing economy arises from the demand for personalised and unique experiences, which are often provided cheaper and with faster access than in traditional tourism services. In addition to new social connections, the sharing economy offers "live" access to local knowledge and a chance to share knowledge about the things the travellers love and to enjoy the status of being an expert for a peer. Travellers and peers prefer locality, flexibility, and spontaneity, all of which are enabled by the sharing economy in addition to effectiveness, attractiveness — and for travellers — lower prices.

The sharing economy challenges traditional forms of accommodation, transport, and services through travellers' interest in anti-corporate, anti-globalised, and often anti-urban tourism experiences. Mutual trust is one of the keys to the sharing economy. For example, the increased popularity of review sites, blogs, and forums demonstrate the influence that social networks of friends, family members, and fellow consumers have on choices regarding destinations and services (IPK International 2015, 35). The role of the sharing economy is also increasing in business travel, although many corporate travel policies forbid it because of the shortage of consumer protection and the vague status of the sharing economy as an economy.

Technology-facilitated sharing between strangers requires knowledge and familiarity with the use of social media and mobile digital services. The power of the platforms and dependency on them are focal topics of debate for both peers and travellers. Platforms force people to provide access to their personal information when the identity of the user is verified by his/her social media presence, for example, by Facebook or LinkedIn profiles. Thus, travellers must acknowledge the issues about privacy, as well as the fact that social media is heavily used for marketing purposes. From this perspective the idea of using the sharing economy for good and for non-profit purposes may turn out to be an illusion. In addition, peers reflect on whether the sharing economy simply creates more part-time and low-paid work possibilities, or whether it might actually replace their waged work.

What is valued in the sharing economy?
Locality, flexibility, spontaneity, economics, and sharing.

The sharing economy in the context of Arctic Europe

There are heated debates concerning regulations (e.g. taxation, safety) around the sharing economy in tourism at the level of the European Union. It is clear that regulations of some kind will see the light of the day in different countries, and in the EU level in next years. Although regulations may reduce the sharing economy, it is unlikely that it would be prohibited, its growth reversed, or that its business logic would vanish totally.

For travellers, the advantages and benefits of the sharing economy are obvious, such as experiencing local living. However, the impacts of the sharing economy on the region and on the tourism sector are recognised in a very limited way in current trend analysis. There are at least three reasons for this: the impacts of the sharing economy are still under-researched, information is produced by dominant sharing economy platforms (such as Airbnb), and the structure of trend analysis often presents changes in the business environment without analysing the impacts at the destination level.

In their endless interest and willingness to engage in locality, when entering into the sharing economy travellers do not often consider the impact of their choices on local people. The frequent turnover of neighbours and their careless action may cause locals not to feel at home anymore. In the long run this leads to changes to the image and services available in a neighbourhood. The reward (money, status, a chance to do well or to demonstrates skills) for the peer is just as important as the benefits for the travellers. Peers, however, have to be responsible for their choices and travellers should be aware of, and interested in asking the peer’s policy towards regional development on issues such as taxation or destination image development.

The sharing economy offers possibilities to respond to the travellers’ need to become acquainted with the way of life in the destination. It offers possibilities for self-employed people to gain trust, efficient access, and wider customer choice. The sharing economy enables services to be offered in remote destinations where conventional businesses might not be profitable. For the sharing economy to be advantageous for the destination, conventional tourism businesses need to be open-minded, search for information, participate in discussions on the topic, and co-operate with peer businesses. From side of the sharing economy actor, self-regulation is preferred to prevent undesirable effects: transparency about visitors is needed.

Conclusions

Future trends challenge destinations. In light of the trends, the role of the destination in the future is to provide a multi-sensorial, narrative stage, where travellers can recharge in a way that that is appropriate to the traveller's age, income level, and cultural background. Demographic factors establish the basis for travellers' opportunities to travel. Therefore, traditional demographic ways of categorising travellers should not be forgotten in the future, but these should be explored in parallel with travellers' motivations, interests, and values.

If travellers search for self-actualisation, stress-freeness, narrative, sense of community, and different forms of luxury, Arctic Europe as a destination has good opportunities to create and provide a stage where these can be needs can be fulfilled. Because Arctic Europe competes with other destinations in the world with interesting content, the increased challenge in the future is how to create stories that inspire people and inform them about what Arctic Europe can provide. It is easy to create a false, non-ethical story — and destination — but in a long run this is not a responsible solution. Travellers' increased awareness and understanding of authenticity leads them to feel uncomfortable and to share the second-hand embarrassment when they confront unauthentic representations at a destination. Although the identity of people in the destination and what actually happens in the destination may not be particularly significant for travellers, it is not — or at least is should not be — insignificant for locals and for the destination. The people in the destination have an opportunity to define who they want to welcome to their location and under what conditions. The destination can focus on attracting travellers who are interested in both the wellness of travellers and that of the destination.

The results of analysis provided in previous pages are next considered through three issues provided by the VAE project: the existing ten product themes created by the project, the existing traveller categories created in the three regions of the project, and the carrying capacity of Arctic Europe as a destination. Ten created product themes[2] illustrate well the changes in customer behaviour and valued issues in the future world. Travellers search for recovery through wellness, locality, and active experiencing. All product themes provide opportunities for the realisation of the travellers' desires. Even though nature and its specific conditions, such as light or coldness, were not highlighted as such in trend reports, they are specific and distinctive conditions of the Arctic locality that facilitate attractive stories and stages. Thus, product themes, especially Arctic Silence and Arctic Light, are distinctive themes for inspiring and attracting travellers. All themes enable the variation of products in the specific theme: products may vary for example in activity level, in the role and use of mobile digital services as integral parts of the product, in ways of personalising services, and in cultural sensitiveness.

Arctic Europe has defined the key international target groups through market categorisation studies. Both the Swedish Lapland Visitors Board and Finnish Lapland operate using the definitions of the national tourist boards. Finnish Lapland attracts "Modern Humanists" divided into five groups: "Ordinary Modern Humanists", "Safe Adventurers", "Fugitives of Everyday Life", "Cultural Individualist Travellers", and "Active Family Travellers", as defined by Visit Finland (2012, 2014). Swedish Lapland attracts "Global Travellers" divided into three groups: "Double Income, No Kids", "Wealthy, Healthy Older People", and "Active Families", as defined by VisitSweden (2016). In Northern Norway, value-based target grouping is centred on how physically active travellers wish to be during their stay, and how many activities they wish to pursue. The Winter Experiences Northern

[2] Arctic Feelgood, Arctic Hop on Hop off, Arctic Light, Arctic Lifestyle, Arctic Adventure, Arctic Nature, Arctic Culture, Arctic Silence, Arctic Food, Arctic Active

Norway project (2016) defined five categories: “Comfort Plus”, “No Stress”, “Activity Chaser”, “Socializer”, and “Safety-Planner”.

The changes to customer behaviour and future values relate well to all existing travel sectors in the three VAE regions and the defined categories can also be said to be relevant in the future. In general, the sectors do not differ substantially from each other. The sectors utilised in Sweden are mostly based on the idea of demographic groupings by highlighting the role of family and age as a starting point. In Finland, “Modern Humanists” are also grouped according to demographic factors, but only in each sector, not across the whole target group. To sum up, the picture of the traveller described in trend reports responds to the general picture of the target groups defined by the VAE regions. Diverse travellers searching for different ways for self-actualisation have a need for comfort and hassle-free quality in the genuine destination. They are internet-savvy, curious about local everyday living, respect flexibility, and value the destination and the opportunities to be presented with narratives. Travellers also have a need to share their experiences and lives as well as to belong in, and tell about their belonging to a specific community. Travellers are increasingly aware of the ethical impact of their travel. Surprisingly, safety was not highlighted very much in the reports but, for example, the request to have time to make decisions before purchasing could also be interpreted as a search for safety searching — to ensure that the purchase is ethical.

The carrying capacity of Arctic Europe has been considered among tourism actors in the region. The changes in customer behaviour and the issues that will be of value in the future world, offer some reflections on this discussion. Carrying capacity has often been discussed in relation to seasonality. In trend reports it is argued that in future, seasonal holiday travelling will not dominate travel patterns because the balance between work and leisure will change and the division between work and leisure will become blurred. This may be the case for people without school age children, but not for families with children in school. In addition to the impact of school holidays, corporate travel policies challenge the combination of work and leisure. Many corporate travel policies do not allow pleasure practices to be combined with business travelling because of the issues of responsibility and insurance. However, these practices are not ideal for workers, travellers, and the tourism industry, and neither do they result in the best situation for the destination. Furthermore, it is difficult to anticipate how the rhythms of leisure and work will influence travel in the future. The meanings of holiday, work, and travelling are being continually redefined. This takes place when the values of diverse travellers change, when millennials actively enter the travel markets, when people’s needs for more flexible and spontaneous choices increases, and when the future of work changes.

Carrying capacity is related to the number of travellers, but also to the type of travellers the destination wants to welcome. The number and profile of travellers using the services provided by peers (the sharing economy), or enjoying the hospitality of friends or relatives is not registered anywhere, a factor that challenges attempts to analyse the impact of travellers on the region. Unpreparedness for unregistered travellers may cause hassle and discomfort among locals and may impact on the carrying capacity of the destination. Nevertheless, actors in the sharing economy offer new products, skills, and knowledge as well as a new image of the destination and may enhance its vitality and even balance the carrying capacity of the destination by offering something that traditional tourism actors do not provide. With this in mind, the openness about product themes and the destination brand work may support actors in the sharing economy to utilise this work in their own operations and thus support the range of products that the destination wants to provide and the image it wants to create.

Although the traveller is seen as disoriented and tourism actors have responsibility for guiding travellers in their choices and providing the required information about the destination, the responsibility of the traveller should also be considered in the discussion of carrying capacity. In general, everyone has the right to travel, but from a long-term perspective, whether this is still a self-evident right and, furthermore, whether it is responsible, should be questioned. The right to travel means self-determination and equality, but destinations can use different techniques (e.g. pricing, guiding to new routes and attractions, setting consumer costs, providing only particular products) to choose their customers and thus limit the number and nature of travellers. Destinations should question themselves about whether they want short-term or long-term benefits and how they want to be profiled as a destination in the future. Today it seems that money brings the right to travel, but destinations should discuss whether this is appropriate: the problem is often ethical, not economic when talking about development and the future of sustainable growth (see Wilenius 2015).

This report has provided an insight into existing studies of future travel trends from the perspective of the VAE project. The results of this report are dependent of the trend studies included in the analysis and on the knowledge that researchers[3] have about Arctic Europe as a tourism destination. The global travel trend studies reflect the general changes in the world and how these changes impact on consumer behaviour in tourism. It is worth mentioning that climate change and its possible impact were not considered in the trend studies and thus not in the analysis. In consequence, the impact of climate change on carrying capacity is not reported here. In global trend reports, for instance Arctic as a geographical region, nature or the conditions of nature (such as clean air or climate change) are not mentioned nor presented as attractions. Trend reports focus on the travellers' perspective and do not discuss the impact and responsibility of tourism as an industry — this task is arguably devoted to academic research. Although knowledge of a customer is important, it is only half of the knowledge needed to develop responsible tourism: values, preferences, skills and lifestyles of locals, as well as existing resources and infrastructure are important issues that should be acknowledged. One example of this is the wellness of animals, which is rarely discussed among travellers but is highlighted in everyday life among locals. There is also a need to focus on changes to local life and environment in parallel with increasing knowledge about the traveller.

Every tourism business can apply the results of this report when considering how things are currently done and when planning for the future. The four categories described here do not reflect transient fashions or wild cards. In this report tourism businesses can find the long-term development paths that will help to improve the responsibility of the industry and to change their actions along the journey. Decisions may vary from the choosing the soap to choosing the story to be told. In conclusion, we encourage thinking about the future and discussions about how we are all better placed to shape tourism in Arctic Europe in future years.

[3] The two authors of this report have lived for long periods in Finnish Lapland, and one of the two also in northern Norway, and both have worked with the tourism industry on several research and development tasks both in the VAE region and in other regions. The researchers have thus gained knowledge of the VAE region as a tourism destination in general, but do not consider themselves to be experts in tourism businesses. The approaches presented in the report are written from the perspective of our roles as tourism researchers and developers.

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Recommended readings

Selected reading list to allow readers to delve more deeply into the discussions presented in the report and when considering the impact on destinations.

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