



THE OUTDOOR EXPERIENCE OF THE FUTURE

A REPORT ON HOW OUTDOOR
LIFE IS BECOMING THE NEW
IN-THING. SCR AND SLAO IN
COOPERATION WITH KAIROS
FUTURE. MAY 2013



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THE REPORT IN A NUTSHELL



This report explores the outdoor experience of the future. Looking back, we note that the driving forces of escapism have changed over the years. What started out as a desire for rest and relaxation has evolved into an active search for fun, enjoyment, as well as a focus on exciting experiences. By taking a closer look at the trends that affect us as consumers in relation to outdoor experiences, we can examine the effects of urbanisation, our need for simplification, safety and what gives rise to these needs. We can also consider our quest for seamless action (our increasing intolerance to hassle) and we can take a look at the role of digitalization: is it a boon or a bane to our experience outdoors? We put the Millennials under the microscope and look at its desire for order, as well as its interest in the little things in life. We contemplate how so-called “curling parents” view the outdoor experience as a success factor for their children. Moreover, how does the outdoor experience fit into the new community of thought?

Being able to engage in business year-round and to increase profitability are the challenges currently facing many providers of outdoor experiences. This report describes the target groups to appeal to, ways to create new potential, and ultimately, to create new tourist seasons.

We finish with a few uncertainties to take into account, four future scenarios, and recommendations to all ambitious providers of outdoor experiences. They are:

1. Do something together - being together is our greatest wish.
2. Make it beautiful! Designification is a rapidly growing trend.
3. Open your arms to the nerds! Families with children are not enough to carry a year-round enterprise.
4. Dive into the digital world - it will help you succeed.
5. Explain your contribution to GDP: your business gets people to think more clearly.
6. Invite the world! Growth lies beyond the traditional target groups.
7. Create something out of the ordinary - again and again.

This report addresses the future of the outdoor experience in general, but has a special focus on SCR and SLAO's business areas.



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→ INVITE!

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EMPLOYERS



SVENSKA
LIFTANLÄGGNINGARS
ORGANISATION

PARTNERS



THANKS TO



THE EXCITING

FUTURE IN OUTDOOR EXPERIENCES...



The hospitality industry is one of the world's fastest growing industries and a vital base of the Swedish national economy. For tourism in Sweden to succeed, significant focus should be put on the reasons behind peoples' desire to travel to Sweden. In 2010, Svensk Turism presented a national strategy for Sweden with a vision to double the turnover of the Swedish hospitality industry by 2020, which spurred a significant increase in the number of full-time employees and the emergence of more holiday destinations. This means that we need products our guests want to buy. Simply put, we will need to have more products “on the shelf” compared to today.

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As member organisations in SLAO and SCR, we must ask ourselves how we can contribute to the national strategy and what we can do to increase growth and viability among our members.

Over the past two years, both organisations and the respective member companies have reviewed what they need in order to continue growing and developing. They have developed a number of areas that each of them should focus on which has resulted in a 20-point programme for SCR and SLAO. Members were first asked to fill out a comprehensive questionnaire where the responses were then interpreted and analysed with the help of many workshops and meetings.

A valuable conclusion of the review was that we need to know more about our guests and about our future target groups. This was discovered as one of many points we had in common. What does the future of the world of outdoor experiences look like for our guests in the next ten years? Both the skiing and camping industries face a range of opportunities and challenges. We ask questions such as: What do the megatrends such as urbanisation and digitalisation mean to us? What are the implications of our guests wanting to max out their time and be in shape for their recreational experiences? Above all, how can we enhance the atmosphere and sensual memories for our guests, and also extend the season and attract new guests all year round? As SCR and SLAO have similar target groups, we have examined the future of outdoor experiences through this unique cooperative project. In collaboration with Kairos Future, we have scoured 50 million blogs entries, interviewed 1,200 Swedes, and put our heads together with contractors and designers of experiences in a “future lab”. In so doing, we have produced

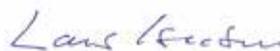
this analysis on future experiences. With these tools at hand, our organisations and members are equipped with the best instruments, whether for strategic business planning or tactical marketing and sales. This also aids us in focusing on the “individual” in the bigger picture and facilities and capital, in addition to our venues. The end goal is to generate profitable businesses that can develop over time.

We hope that other industries and partners can take knowledge away from the report and utilise it. The more who can benefit, the better.

We welcome you to study, learn and build the future of outdoor experiences for our guests.



Hans Gerremo
CEO SLAO



Lars Isacson
CEO SCR



Christer Rosén
Chairman SLAO



Eva Werkelin
Chairman SCR

**50 million
blog entries**

**1,200
interviews**

“Future lab”

**International
trend research**

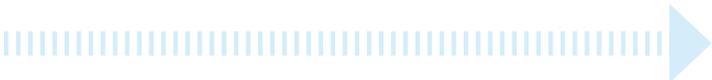
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IS THE OUTDOORS AN IN-THING?

This trend of wanting to be outdoors: is it on the way out or on the way in? Are we losing our close link to nature as urbanisation increases, as more and more people move to the cities? Or is it perhaps the case that the further away our everyday life is from nature, the more valuable nature becomes as a source of recreation for both body and soul?

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ARE WE LOSING OUR CLOSE LINK TO NATURE AS URBANISATION INCREASES, AS MORE AND MORE PEOPLE MOVE TO THE CITIES?



We are fast becoming a society in which more and more emphasis is placed on our mental capacity and our ability to continuously perform at a high level when dealing with complex situations. Perhaps, it is also true that outdoor experiences and proximity to nature will become more important than ever for relaxation and recovery. This outdoor time is important not only for the body (fitness as compensation for sedentary work), mind (compensation for the stress of everyday life), but also the brain (capacity and stimulus for creativity, etc.).

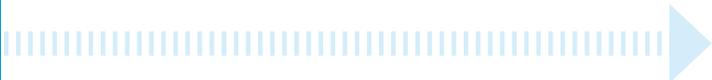
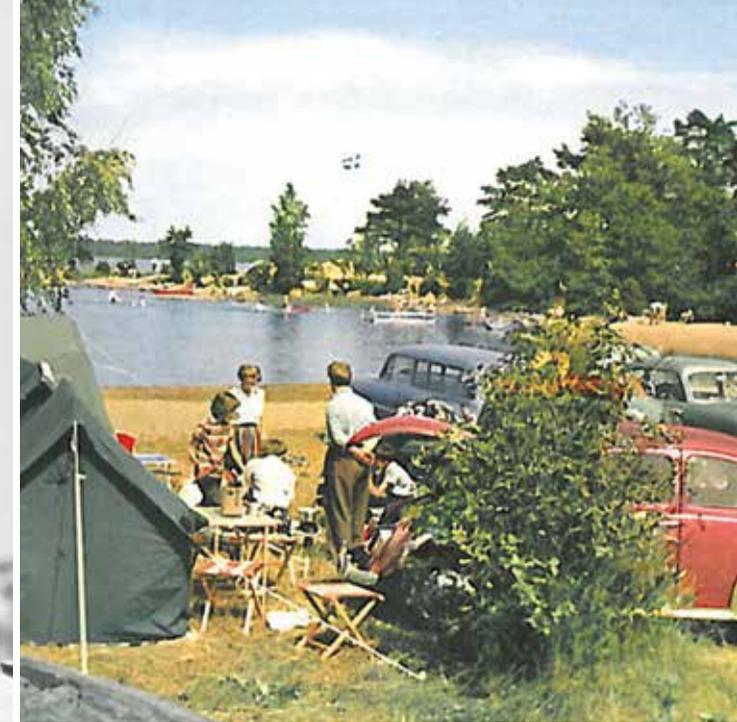
In this report, we examine the trends currently impacting outdoor experiences and we take an in-depth look into everything from commodification and digitalization to the struggle curling parents face in giving their children the best conditions possible. Will they continue spending time in nature? Furthermore, we look ahead to reflect on what the outdoor experience of the future could be like. However, first we will take a look back in order to understand the emergence of the outdoor experience in pace with the phenomenon of holidays occupying an increasingly larger place in our lives.



THE ORIGIN OF THE HOLIDAY

In order to look into the future, one first must take a step back into history – the distance may provide a better view.

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Leisure time is not an old concept. In Sweden it dates back no further than a few generations. The concept was first introduced to the public at the Leisure Exhibition in Ystad in 1936. The exhibition had 250,000 visitors, a very large number in that day and age. However, having time off was new and radical. The legislation on the eight-hour work day was only a decade old and, for most people, having time left over for oneself after work was rather strange.

In the days of a more agrarian society, all the waking hours of the day were spent on the necessary tasks for survival and the perpetuation of the family - with the exception of holidays. However, even the feasting during these days of rest had to adhere to the traditional rites and rules. It was certainly not considered free time.



LOOKING BACK HELPS TO SEE AHEAD

THE HOLIDAY – THE MOTHER OF MANY LEISURE ACTIVITIES

The idea that people should have free time for socializing and recreation grew out of the industrial society. Once the concept of leisure had taken hold in both the Swedish public and policy-makers, new changes followed. In 1938, parliament legislated a two-week holiday for everyone. As always, in the face of change, holidays were greeted with both joy and fear. There was joy among the many people who laboured in factories, on construction sites, in barns or out in the fields, but there was also concern – especially among the leading groups of Swedish society. How would one get the general working public to take advantage of its holiday weeks so people came back to work rested, in good health and in high spirits? Just before the first holiday, a state councilman named Engberg, who was responsible for school and public education, went so far as to hold a radio speech on how to best take advantage of these newly acquired two weeks of holiday. The important thing was to gain new insights and have valuable new experiences. One must not come back to work and perform worse than before. In addition to

nature and outdoor activities, intellectual and cultural elements were considered to be important themes for the holiday. Activity and betterment became the key concepts of leisure and of holidays in particular. There was deep concern among the leading representatives in Sweden that holiday and leisure time would be absorbed by a demoralizing entertainment industry or, even worse, by slothfulness and drunkenness.

CAMPING DEVELOPED FROM CYCLING AND TENTING

Due to the fact that the two holiday weeks were scheduled during the summer, nature experiences saw an upswing in popularity. Holidays involving bicycles and tents were encouraged and a market emerged. Holiday legislation and the government's desire for healthy activities were not the only driving forces behind the trend. The war in Europe meant that the bicycle and holidaying within national borders were the only remaining choices available. Not many people had access to private cars; the development that could have gained momentum was halted for most of the 1940s, and this also applied to the emer-

gence of bus services. When Denmark, Norway and Finland were closed to holiday-goers, people would travel to different locations in Sweden. They did this by bicycle. For example, the youth of Stockholm would cycle to the west coast for camping, while rural youth cycled into Stockholm and other cities. With a tandem bicycle, a lot of time could be saved.

As early as 1930, organized campsites had been established. The youth hostels also came about during the 30s. In 1938, hostels had a total of 2000 visitors, a number that was cut in half once the war broke out in 1939 and the borders were closed. Camping became the alternative for many people. Tents became a huge phenomenon which dominated the camping scene until 1960. By this time, bicycles had been replaced with private cars. In 1960, there were 1 million registered cars in Sweden compared to just 50,000 in 1945. Today, there are 4 million registered cars in Sweden.

LET'S HEAD OFF IN OUR CARAVAN!

With increased prosperity, the demand

for caravans grew. In Germany, caravans were being manufactured on a large scale as early as the beginning of the 1930s. However, in Sweden, the manufacturing of caravans only started after the war. SMV began its production of caravans in 1948 and more manufacturers entered the market during the 1950s and 60s. In 1977, 14,000 caravans were sold in Sweden, compared to just 4000 in 2012. However, the interest in motor-homes has increased significantly, and in 2012 nearly as many motor-homes as caravans were registered. Today, there are approximately 280,000 registered caravans and more than 50,000 motor-homes.

280 000
caravans

50 000
motor-homes

THE DEVELOPMENT OF CARAVANS AND MOTOR-HOMES

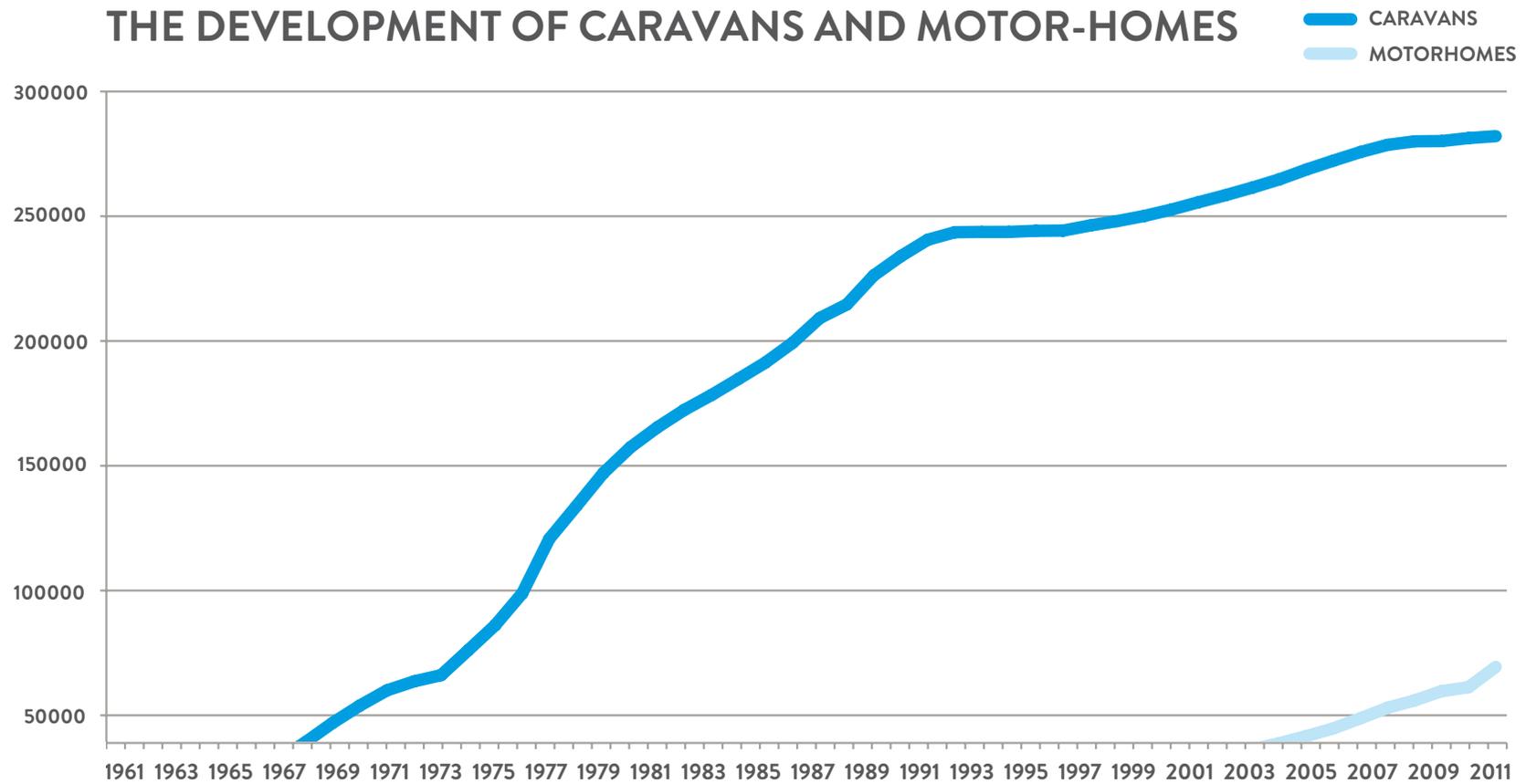


Fig.1: The development of caravans and motor-homes from 1961 onwards. Source: HRF

THE HOLIDAY – THE MOTHER OF MANY LEISURE ACTIVITIES

Over time, camping holidays started facing strong competition from other holiday activities. 1960 not only saw an increasing number of holidaymakers abandoning their tents for a caravan, but a growing number of people spending their holidays abroad in remote locations like Mallorca in the Mediterranean or the Canary Islands off the west coast of Africa. Charter tourism took Swedes abroad for their holiday. On the other hand, the switch to right-hand traffic in 1967 made it easier for foreigners to reach campsites in Sweden by car.

It would be another ten years before the big breakthrough for the major camping facilities occurred. It was not until the 1980s that the large mixed-activity facilities emerged. During the summer months of June-August, the camping industry today has a market share of 46% of guest-nights for Swedes and 44% of guest-nights for international visitors. In particular, the share of guest-nights for international visitors is growing rapidly.

JUST GO FOR IT! | During the 1970s and 1980s downhill skiing had a breakthrough in Sweden. It was Ingemar Stenmark's success in particular which led many to want to take off down the slopes. Downhill skiing had previously been a rather exclusive recreational activity. It also had an entirely different origin than camping and its broad popular appeal; first of all it had little to do with the introduction of the general statutory holiday.

In the mid 1920s, courses in downhill skiing were taught in Storlien. Storlien was a fashionable mountain resort with visitors primarily coming from society's upper classes. The inspiration for specifically downhill skiing, or slalom as it was also called, came from Switzerland and Austria. Ideas about how to do it were brought home through field trips to Kitzbühel in Tyrol and, in 1933, Swedes competed in the World Championships in St. Moritz. However, the sport was relatively new, even in the Alps. In 1927, the first gondola lift for skiers was built in Engelberg, Switzerland, and in 1928 the world's first rope lift was built by the French in Chamonix. The first rope lift in Sweden was built in Åre.

LACK OF COAL KEY DRIVING FORCE | The holiday legislation of 1938 came to be a key driving force behind the emergence of camping. The new-found holiday played a smaller role for downhill skiing. The war and the contingency years, which formed another driving force behind the growth of camping, would also have a significant impact on the emergence of downhill skiing - even if the growth would take some time. The third lift in Sweden was built in 1947 and about 20 facilities came into being during the 1950s. The 1960s and 70s saw even more lift construction, but a breakthrough did not materialize until the 1980s.

SKI-PASS TURNOVER IN SWEDEN FROM 1983 TO 2012 (SEK, m)

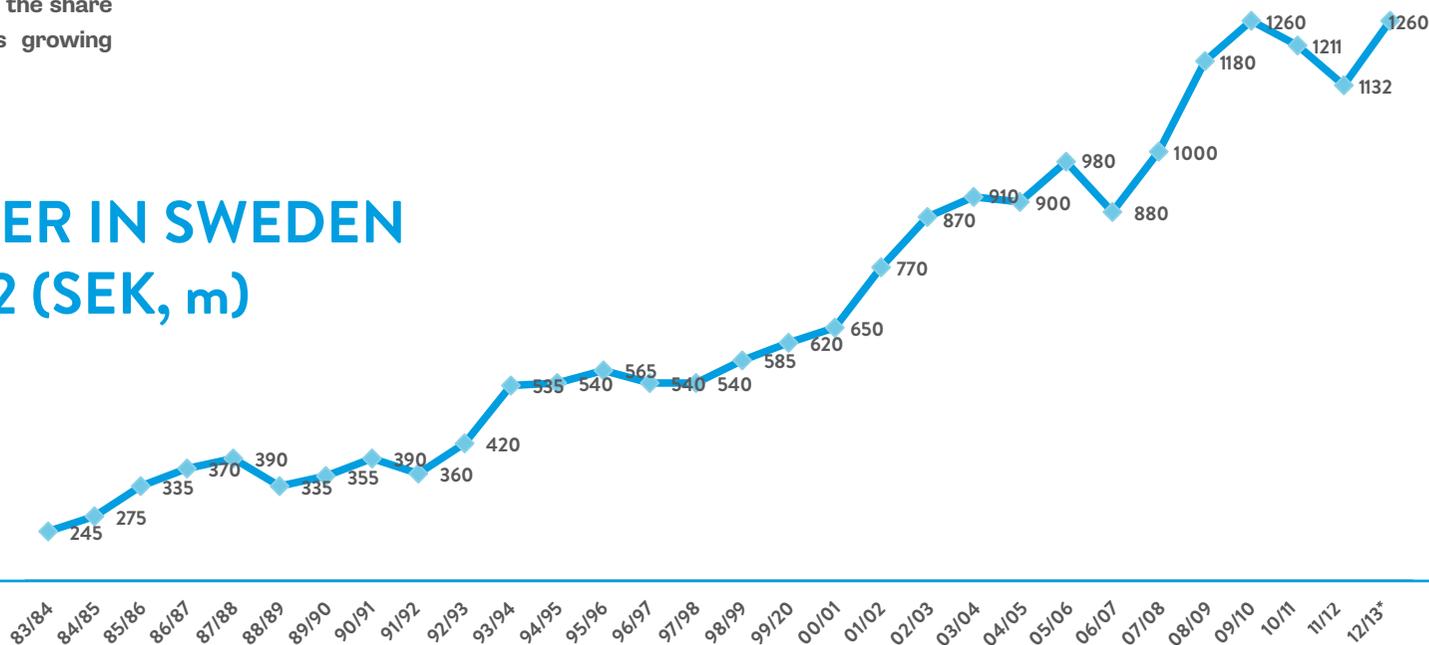


Fig. 2: Ski-pass turnover in Sweden from 1983 to 2012 (and forecast for 2013). SLAO 2012

The war and the contingency years of the 1940s would bring decisive changes with them and would set the stage for the explosion of downhill skiing some four decades later. If it was not for the sports holiday, Ingemar Stenmark would not have had the chance to inspire so many Swedes to go downhill skiing. The sports holiday first came about as a coal holiday during the cold winters of the 1940s, as it was necessary to save coal for heating schools. The sports holiday became the institution around which many ski resorts in the mountains and elsewhere in the country could build their business. When Stenmark came into the picture, both the habit of going on a one-week skiing holiday in the winter and mountain facilities with hotels and restaurants was already established. Previously, cross-country and ski touring were the dominant forms of skiing, again having gained popularity since the cold winters of the contingency years of the 40s.

Another factor behind ski touring and downhill skiing in the mountains was the military. While it is difficult to identify the first camper, few would deny that the father of Swedish downhill skiing is Captain Olle Rimfors, 1896-1994, inter alia a professional soldier from 1915 to 1950, director of the Skidfrämjandet (an organization that organizes outdoor ski related activities) and gymnastics director.



FINALLY THE TWO ACTIVITIES MEET – ON A HIGHER LEVEL

Camping had its origin in the broad masses and had its breakthrough at the same time statutory holidays came into existence. Since then, camping has been upgraded from hiking and cycling holidays to car and caravan holidays and then to today's motor-homes with purchase prices from a few hundred thousand to several million SEK.

Downhill skiing, which had more elitist origins with soldiers and Skidfrämjandet as key driving actors, came to a slow start in the 1930s, but finally had a breakthrough in the 1980s. At the turn of the millennium, the two of them seem to have met – camping gained elitist elements including luxury campers and “glamping” (glamorous camping) while downhill skiing increasingly became a sport of the masses.

RADICAL TRENDS AND THEIR IMPACT ON THE HOLIDAY

Once holidays became a reality and leisure became a household word in the early 1940s, the trend was still quite different from the one prevalent today. Until 1960, there was a strong belief in the future. The extension of the holidays to three weeks in 1951 was one of many signs of increasing material well-being, but the sense of moral duty from the 1930s was still very much present. The holiday would be characterised by activity and self-improvement.

THE RIGHT TO ENJOY

In the 60s and 70s, however, a new status quo came into existence in society. Sweden had become prosperous. A new, critically thinking generation had grown up and was used to an increasingly consumerist lifestyle. The holiday was expanded twice during this period, in 1963 to four weeks and in 1978 everyone was given a fifth holiday week. Now leisure and holiday were characterised by a new awareness that was much more focused on entertainment and relaxation from work. Had the decision makers of the 1930s been alive, they would perhaps have felt that their worst fears with regards to holiday and leisure had been realized. Contemporaries however, saw this development in a different light. One had the right to have fun and relax, especially since the future did not seem so secure and it was not entirely possible to exert any influence over it. Life was all about living in the present.

The last two decades of the 20th century brought with them a third trend. This occurred while camping and downhill skiing both grew by leaps and bounds and even began to resemble one another in terms of the target group and activities.

NUMBER OF WEEKS OF HOLIDAY

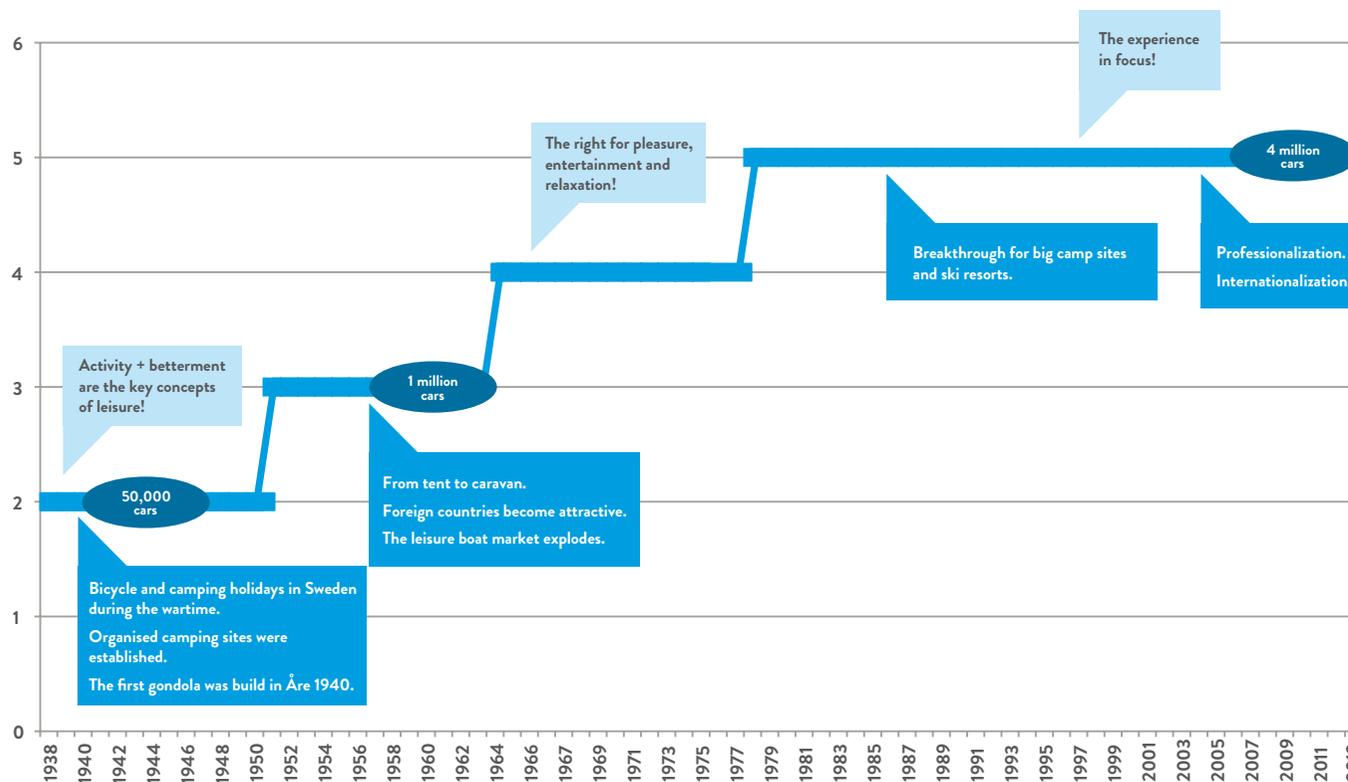


Fig.3: The emergence of an increasing number of holiday weeks contribute to the development of the industry.

FROM RECREATION TO EXPERIENCE CONSUMPTION

The consumer's focus from the previous decades was here to stay, but it now became increasingly focused on the consumption of the experience itself, which favoured both camping and downhill skiing, and other outdoor experiences. A more rigorous market-oriented train of thought in society also influenced ski-lift operators and camping sites. Holiday and leisure went from being primarily political projects in the 1940s to economic projects, both for those taking part in the enjoyment and for those who provided the activities or facilities.

- From tent to caravan
- From the steel edge to the splitboard
- From folk boats to luxury yachts
- From percolated coffee to the mobile espresso maker
- From the summer cottage to year-round housing
- From enjoyment to the return of the fitness-recreational movement

THE EARLY SPRING IN SOCIETY? THE DEVELOPMENT CALENDAR

At the turn of the century, the great years of growth appeared to be behind us, both in society at large as well as for leisure activities. The 2000s have offered a much grimmer picture, especially with the financial crisis in 2008. The future seems to be extremely uncertain and completely impossible to predict or control. The following may be viewed as a year's calendar. If "spring" stands for the burgeoning optimism of Swedish society from 1940 to 1960, "summer" first started during the harvest years of the 60s and 70s, followed by a pleasant autumn during the 80s and the 90s, despite the crisis. The 2010s currently offers itself as a bitterly cold winter. We have brought the hedonism of the 80s and 90s with us, popularised through luxury cars, luxury yachts and luxury summerhouses, but afflicts us with heart rate monitors and exercise programmes.

We are facing a major change in society at large, and also within the various outdoor industries, especially when it comes to camping and downhill skiing. What kind of new spring is around the corner? What kind of new trends can we expect? More optimistic ones? What roles will new technologies and global audiences play? Can the new spring make the seasons of the calendar more interchangeable, even for two industries whose principle seasons are summer and winter? Are the experience industries adequately prepared and motivated for this kind of shift?

Although today's "spirit of the time" seems to remain, no winter lasts forever - neither a harsh, biting winter nor a delightful one. In the following chapters, we will look at the current situation and the driving forces ahead.

DIFFERENT AGES' OUTLOOK ON HOLIDAYS FROM 1940 TO 2020

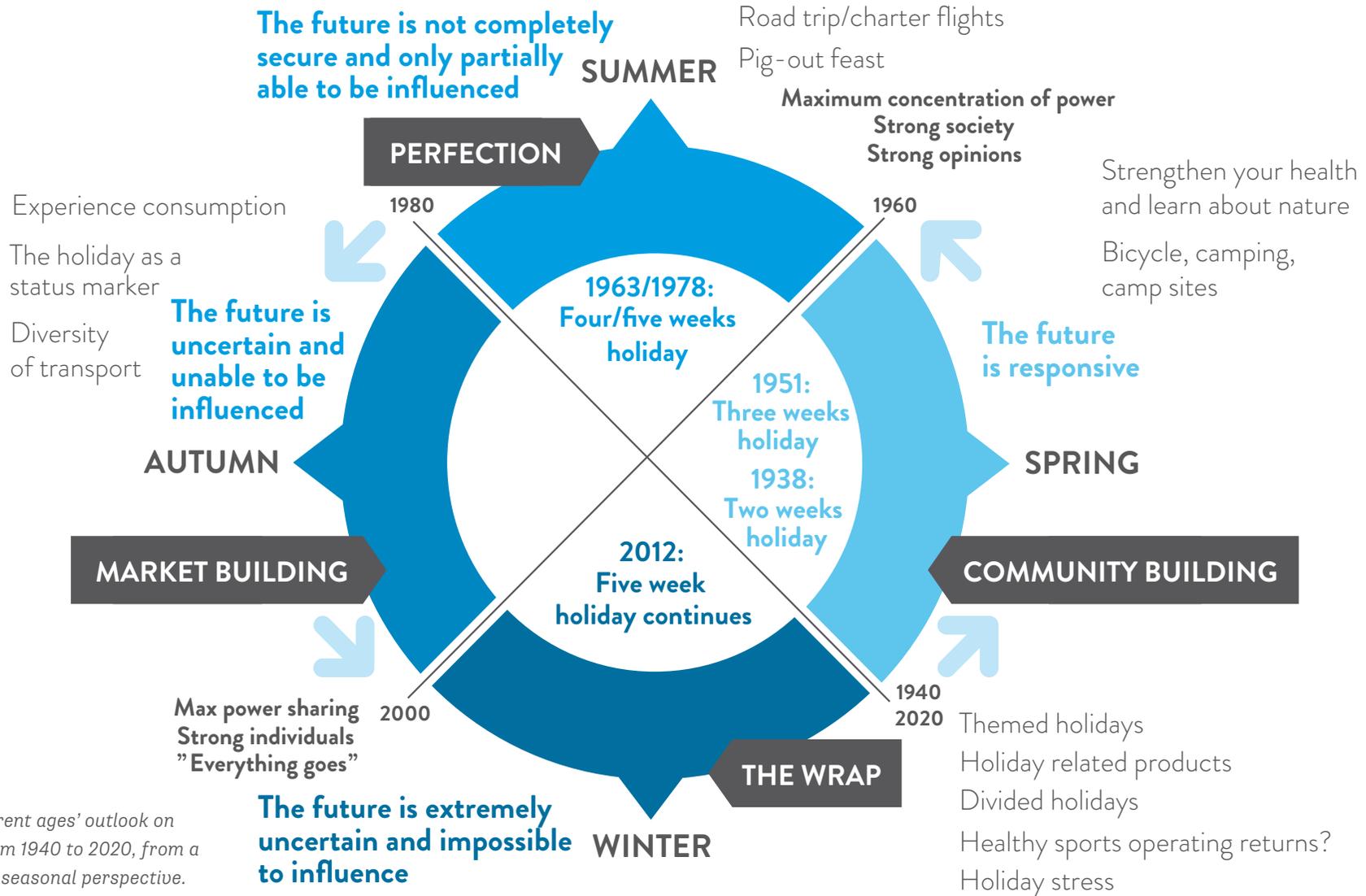


Fig. 4: Different ages' outlook on holidays from 1940 to 2020, from a "figurative" seasonal perspective.

THE CHALLENGE: NEW GUESTS YEAR-ROUND



Nearly a third of all Swedes have been on a camping holiday in the last three years, staying either in a cottage, caravan or a tent. The motor-home is winning more and more enthusiasts and with it, holiday-goers are more mobile and are not quite so “tied” to a camp site.

Almost as many people (28%) have been on a skiing holiday in the last three years. Downhill skiing is the most popular (23%), but cross-country skiing (8%) and tour skiing (6%) also have their share of enthusiasts. The potential for the future is also strong. 29% of Swedes are “quite sure” they will go on a skiing holiday during 2013-2015.

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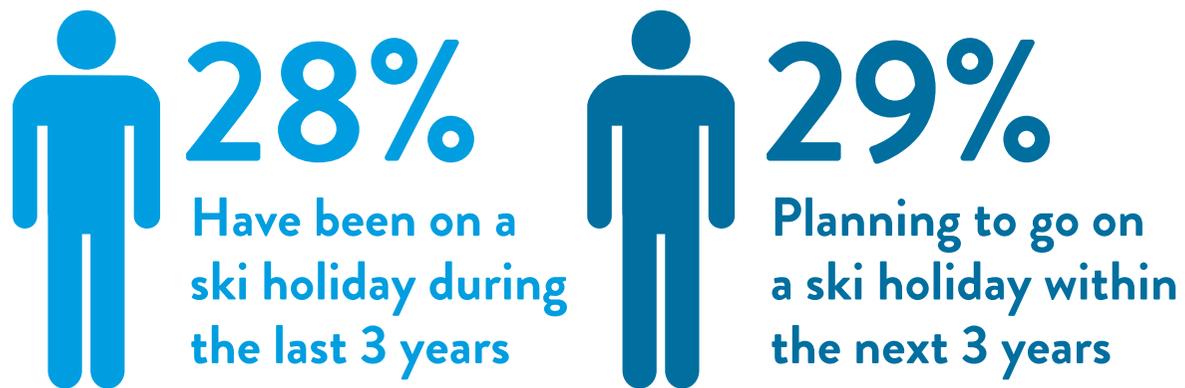
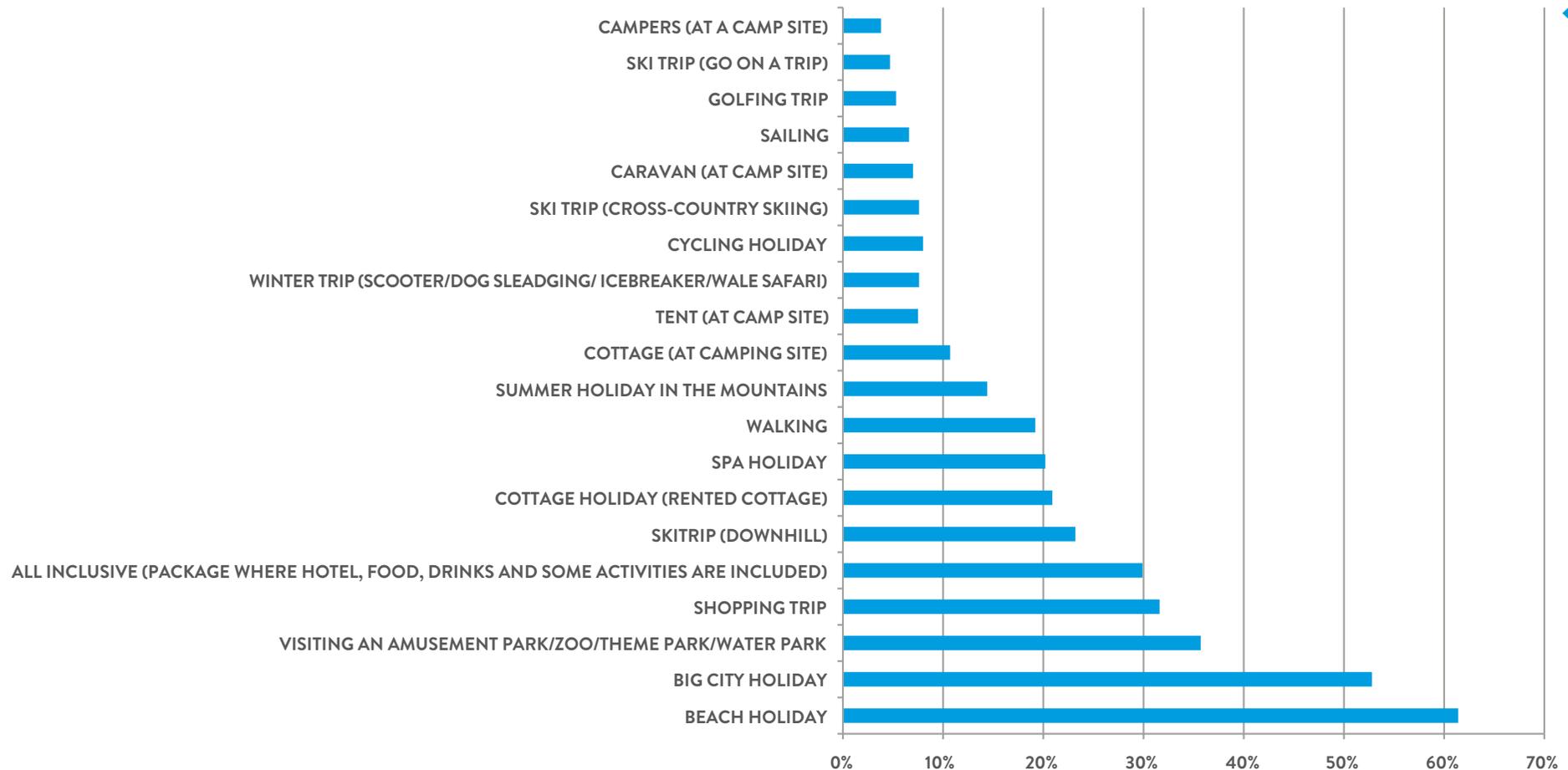


Fig. 5: Experience with various forms of skiing holidays (2010-2012) and “quite sure” plans ahead (2013-15) in the Swedish population (population representative survey in February 2013, n =). Proportions in %.



This means there is fantastic potential for lift operators and camp site owners. However, there are of course many other attractions to be found while on holiday. Different holiday alternatives generally compete for people's time and money (for example, home improvement, gardening/landscaping). Holiday alternatives sometimes complement each other (a visit to the amusement park is often combined with accommodation at a camping site), but sometimes also compete against each other. Below is an overview of some potential common holiday alternatives according to the spontaneous perception of the respondents of a survey. Several of these may be combined with both skiing and camping. This also applies to beach holidays. However, Sweden faces tough competition from traditional charter destinations.

Potential for various holiday forms = plans that are "quite sure" in the immediate future (2013-15) of the Swedish population (population-representative selection in February 2013), proportions in %.



THE CHALLENGE IS TO INCREASE NEW POTENTIAL

Holiday forms such as beach holidays, spa holidays, hiking holidays and all-inclusive holidays have far more people who claim to be interested in them than those who actually take part (there is something that prevents them from putting their plans into action, and thus there is quite a high growth potential). Skiers and campers appear to carry out their plans to a large extent (there are about as many people interested as there are those who take part). Thus, the challenge in the near future for these holiday alternatives does not appear to lay in identifying and removing barriers that hinder people from realising their plans. Rather, the attraction of new potential needs to be addressed. How can we get more people to want to spend their leisure time outdoors? What do future lift facilities and camping sites need in order to attract a larger share of traditional target markets and add more new ones, preferably year-round?



10 INSIGHTS INTO THE OUTDOOR EXPERIENCE OF THE FUTURE



What is needed to increase the attractiveness of the outdoor experience?
On the following pages, we will immerse ourselves in trends affecting the outdoor experience of the future, both in terms of demand and content.
What are the consequences for providers of outdoor experiences?

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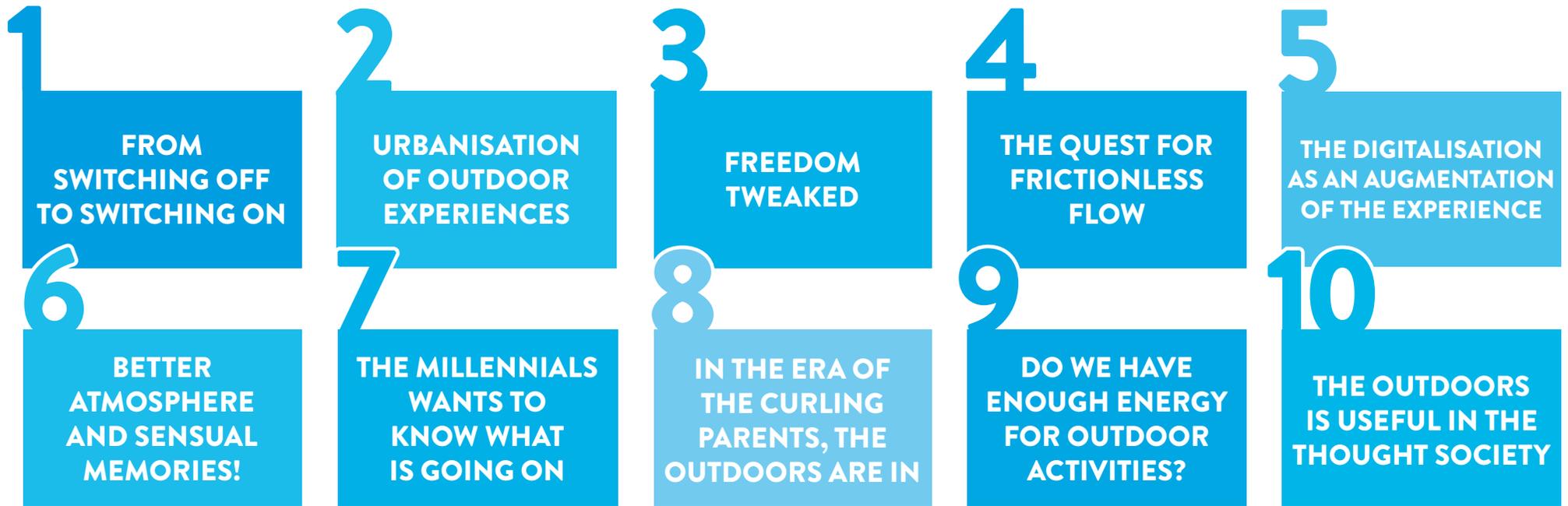


Fig. 7: Overview of the 10 insights.

FROM SWITCHING OFF TO SWITCHING ON

The main driving force behind all escapism is a desire to get away from an everyday life perceived as being routine. For a long time, the word “escapism” had a negative connotation. Anyone who devoted himself to escapism was a person who could not connect with reality in a meaningful way. With time, however, the term came to take on a positive meaning. It is not just about an escape from everyday boredom, but also about a natural need to get away now and then to a new environment, to have new experiences or just to explore a different world than the one everyday life has to offer.

THE DESIRE TO GET AWAY AND THE DESIRE FOR SOMETHING DIFFERENT

One can actually see escapism as a way to recharge one’s batteries mentally, physically or both, and then return to everyday life with renewed energy. This does not necessarily mean that one wants to get away from the everyday routine, but that one yearns to step away from his/her usual environment and into a different reality. The attraction may be as important as the thing one is trying to escape.

The driving forces behind all escapism are, on the one hand, a desire to get away, and on the other, a desire for something different. At the same time, the things that both attract and repel us change over time. To understand the driving forces of escapism, we must realise how everyday routines change, as well as how people’s dreams of ‘something different’ evolve.

EXPERIENCES ARE ABOUT A PERSON’S INNER JOURNEY

However, the driving forces are not just about an outer world that one wants to flee or new worlds one seeks to find. Escapism is very much an inner journey where the individual wants to move away from certain states of mind in order to reach others. If we look first at the external driving forces, the change of environment is a driving force in itself. It is all about going to new places and getting into new contexts. The freedom offered by a camping lifestyle stands in stark contrast to most people’s everyday routine. The simplicity of camping is changing in contrast to what many people think, and is increasingly filled with sophisticated technology. The fresh air of the mountains represents a different reality than that of many people in their increasingly urban environments.

TIME AND ENERGY ARE NEW CURRENCIES

Internal driving forces are at least as important as the external, and for the modern busy big city person, they are increasingly important. Time becomes a factor valued more and more while money takes on less importance for both the camper and the skier. Money becomes a kind of staple necessity – something that one must have – while time becomes a scarce resource of which you should make use. Another new rare commodity is energy. In order to fully take advantage of one’s holiday, it is important to be in shape. Resting is still important, but in the era of the status update, it is also increasingly about coping with the new challenges of leisure. Roughly described, we can see that the two concepts of leisure and work have partially changed places with each other. Now we have to prepare ourselves to be on leave, coping with relaxation and catching up with everything that leave has to offer. The holiday should also contribute to revitalising yourself for maintaining a challenging career.

BACK TO THE HEALTH IDEALS OF THE 30s

We are also approaching the “Comeback of the Fitness Recreation Movement”, at least in the high-performing segment of the population that makes use of holidays to cope with a demanding job at the management level. We mortify ourselves in order to get into physical shape and we struggle on the floodlit tracks, on cross-country skis or in running shoes. We do everything to cope with everyday life and polish our own brands as being strong and healthy. Fitness cruises with personal trainers have replaced the pig-out feasts of the charter operators. We see an exercise trend that is close to the 30s’ ideals of public health.

EVERYDAY LIFE IS CHANGING

OUR DREAMS ARE CHANGING

FROM SWITCHING OFF TO SWITCHING ON

Fig. 8: The driving forces behind escapism change. Time and energy are the new currencies. Furthermore, the holiday should not just be about relaxing, it should also be “inspirational”.

2

URBANISATION OF OUTDOOR EXPERIENCES

There is a clear global trend of more and more people moving into the city. This trend is also strong in Sweden. However, urban settings do not automatically stand in stark contrast to nature. Nature can also be found in the city, and this is perhaps one of the hottest new trends in outdoor experiences.

For example, urban camping entails spending one or several nights outdoors in the city. One example is from Berlin, where the city provides small lodging boxes, called “scubes” for camping in Berlin parks. In England, there are companies that work as intermediaries between homeowners who are willing to give up their gardens to campers who want to camp in house gardens. Additionally, these are both examples of solutions to one of the greatest challenges of urban camping – permission to camp in the urban environment.

THE MANY REASONS FOR URBAN CAMPING

The reasons behind urban camping are obviously economic, but the experience of the urban environment also becomes something quite different than that of a hotel guest. Perhaps that is the new thrill – discovering new dimensions in an environment that one already knows. If one does not know the environment, then at least one has a familiar and safe environment in the caravan / motor-home or tent.

URBAN SKIING

Even skiing is subject to the urbanisation of the natural experience. Hammarbybacken in Stockholm is a good example, where one can go down the slope at full speed with the city skyline at the forefront. The yearly ski race around the Royal Palace in Stockholm is like a “mini Vasa race”, but around one of the oldest urban environments in Sweden (The “Vasaloppet” route is the fabled route that King Gustav Vasa is said to have skied in the 16th century).

URBANISATION MOVES OUTDOOR EXPERIENCES INDOORS

Nature is not the only thing that can be found in an urban setting. Performing outdoor activities indoors is becoming increasingly popular. The Swedish Climbing Association has an increasing number of members who are solely active indoors on artificial climbing walls. For example, in Holland and Israel there are ski simulation centres that feature artificial slopes. The idea is to stand still as the slope rolls up underneath you. Some of these centres also organize ski trips to the Alps twice a year, where skills can be put to the test on real slopes. So various indoor activities can lead to people getting out into nature and down the slope (or help them get in shape to cope with the real thing).

Thus, the outdoor experience has already moved into the city. In the future, we can expect more traditional outdoor adventures in the city and even indoors. This may be seen as a threat to experience providers out in the countryside, but it can also be seen as an opportunity to gain new customer groups and to keep in touch with them year-round. The challenge is to provide customers with a new perspective which in itself brings new experiences.



URBAN Camping

URBAN Skiing

3

FREEDOM TWEAKED

We all yearn for freedom! However, it should be packaged to the right extent and easily accessible. Who has time for a real adventure in today's society? Although Swedes have many holiday days compared to those in other countries, many feel that the days are very few. It goes without saying that people would like a guarantee, an assurance that everything will be great! Happy kids, a happy spouse, sunshine and friendly people wherever you go. Since many Swedes working two jobs struggle to piece their lives together, another challenge arises with regard to making the right choices:

FIRST OF ALL, THE PACKAGING OF FREEDOM IS MORE IMPORTANT

What was previously a trip to the mountains, might need to be packaged as "survival training with a guide" for city dwellers who have forgotten how to make a fire or how to dress in the wilderness. Packages also make it easier for travellers as they do not have to make so many decisions about details. Ideally, the package should be flexible enough to allow for individual adaptation (and enhance the feeling of having enough freedom).

SECONDLY, THE FREEDOM NEEDS TO BE QUALITY-ASSURED

On holiday, a reasonable degree of adventure is welcome, but danger is not. Swedes are extremely safety-conscious; adults wear helmets when cycling and life jackets on boats even when ashore; these precautions are not common

abroad. In addition, Swedes wear a back plate and helmet while skiing. For campers, ticks are bloodthirsty predators from which one needs protection. It would be great if there was an insurance policy for everything.

THIRD, PEOPLE HAVE BECOME INCREASINGLY COMFORTABLE

When people who work at desks decide to go hiking in the mountains on their holiday, organizing the transport and packing can make the difference between enjoyment and miles of walking with an aching back and knees. On top of that, a camper, the cottage / motor-home with a comfortable bed becomes a welcome alternative to tents and sleeping bags. That comfort also extends to our meals.

Freeze-dried soup is more and more often discarded in favour of a three-course meal with wine at the mountain hotel. The outdoor experience is becoming gourmet.

FOURTH, WE ARE BECOMING MORE GADGET-OBSESSED

The range of "must have" gadgets for a great outdoor experience is growing exponentially. Besides the Weber grill with all its accessories, we have difficulty living without the portable espresso machine, the heart rate monitor with altimeters, the GoPro camera, carbon-fibre hiking sticks with springs, the self-inflating sleeping matters, and last but not least the outdoor clothing in different materials and designs, all in the cut and colours of the season.

Fig. 9: We can afford to spend money on the little extra. However, we believe we cannot afford to waste precious holiday days on bad choices.

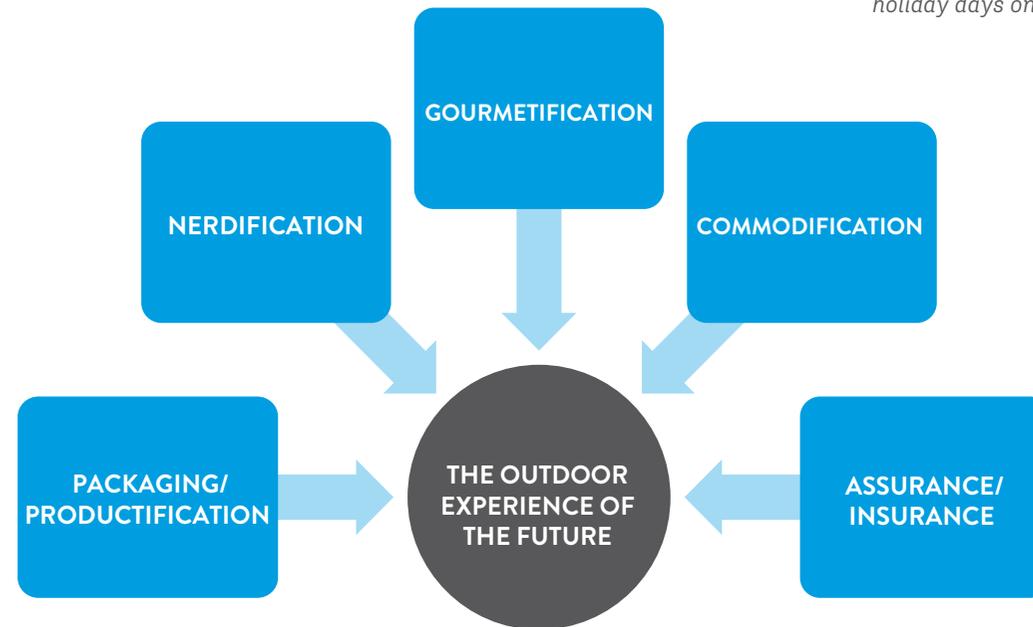


Fig. 10: We can afford it! In the Swedish blogosphere, there is extensive discussion about which gadgets you need for a variety of outdoor experiences.



FIFTH, THE NERDIFICATION OF THE OUTDOOR EXPERIENCE

is on a roll. Anyone not satisfied with his old downhill skis may very well turn, for example, to Wagner Custom Skis in Placerville, Colorado, which has developed a “scientific” approach to designing the right skis for the right person. The skier completes a “ski-DNA” form consisting of a questionnaire with 12 questions where data such as height, weight, sex, preferences regarding terrain, snow depth, difficulty level and former ski choices are collected and fed into a computer which then calculates the perfect ski design (size and material) for the individual. The skies are then made by hand according to the formula. “It’s a combina-

tion of 21st-century, computer-controlled milling and manufacturing equipment and old-world craftsmanship and attention to detail,” as Mr Wagner explains the concept. However, cross-country skiers can also order custom skis by SkiSelector, a Swedish proprietary innovation, an advanced measurement system that, in about one minute, analyses all the important features of a ski and effectively aids in selecting the optimal skis for each track type, ski condition, and

for each skier, from recreational exercisers to elite racers. SkiSelector offers skiers help in analysing skis and in getting a clear view of the grip, stiffness, camber characteristics and sliding properties in order to get a better skiing experience and faster skis. The company ensures that once the skis have been analyzed, it is easy to figure out how they should be used for best grip and glide...



Photo: Tuukka Ervasti

5

THE DIGITALISATION AS AN AUGMENTATION OF THE EXPERIENCE

In recent years, there has been a rapid development of the digital experience. Those who were young in the 60s and 70s may remember a computer game where a small dot bounced between two lines – the shorter the line, the greater the difficulty (the game was called *Tennis for Two*, created by William Higinbothams in 1958 to attract people to computers). For those who are young today, it is hard to imagine that people queued to play this game! To describe the drama in today's far more advanced and often interactive computer games, there is now a separate concept, *Ludology* (ludo being Latin for play). *Ludology* describes, among other things, the properties that are characteristic of computer games, such as interactivity, lack in films.

What does this development mean for the outdoor experience? Does it entail a threat? Will we opt out of the “real” experience? Or does it entail support and augmentation?

THE AUGMENTED EXPERIENCE

There are plenty of examples of the latter, especially when it comes to applications that complement other things, like star gazing (*SkyView* helps you identify different stars, planets and star constellations), Track Search (*MyNatural-animalTracks* helps you identify different animal tracks), skiing (several ski resorts offer apps measuring completed fall height, number of slopes and allows the skier to collect points and receive awards for certain accomplishments). Applications are also available which facilitate the planning of the experience in various ways, such as weather applications tailored toward activities of various kinds, such as those of Search and Rescue.

The GoPro camera has been designed for adventurers who want to film their adventures themselves (it has wide angle lens, is small and designed to be attached to a bike, a helmet or a hand-held pole); it enhances the experience in different ways, by extending it and making it available over and over again both for the filmmaker and for everyone else who wants to share.



Fig. 13: Image from GoPros advertisement for the HERO3 camera that allows the user to film his/her own experiences (the camera is attached to the helmet).

Additionally, there are other examples of how digital experiences have been experimented with to change people's behaviour. This includes the transformation of stairs into piano keys encouraging people to move more and take the stairs instead of the escalators. Another example is equipping bins with a soundtrack to get people to throw rubbish into the bin.

However, how can the digital experience conceivably develop in the future?

“DRY SWIMMING” AS A SUBSTITUTE FOR THE “REAL THING”?

In a graduation film by an Israeli film crew, Eran May-raz and Daniel Lazo from the Bezalel Academy of Arts (Jerusalem) depict a futuristic world where reality is augmented through a pair of lenses. The character in the film makes a “base jump” with a “wing suit”, a sort of Batman-like costume, which makes the user feel like he is able to fly. A “sport” which in reality is practised by extremely reckless people who throw themselves off steep slopes at high speeds in their suits and then trigger a parachute for landing. In the digital world, this is an experience that can be enjoyed by all, albeit with slightly less of an adrenaline kick. Perhaps an example of an experience that is more attractive than a moderately exciting outdoor experience?

6

BETTER ATMOSPHERE AND SENSUAL MEMORIES!

Functional, clean toilets, safe and well maintained facilities have become hygienic factors. Everything has to be tip-top, but that is not enough. The customer's demands for today and the future are a more elusive, abstract phenomena.

Usually, one talks about the importance of the overall experience. However, what is a good overall experience? It should contain both peace and quiet on the one hand, and inspiration and escapism on the other. However, it has a lot to do with meeting people, friendship, compassion, love and security. Above all, it should contain common experiences - being together ends up on top of the wish list.

Aesthetics, is also a key concern. This is primarily about landscape, but more and more, it is also about design and architecture.

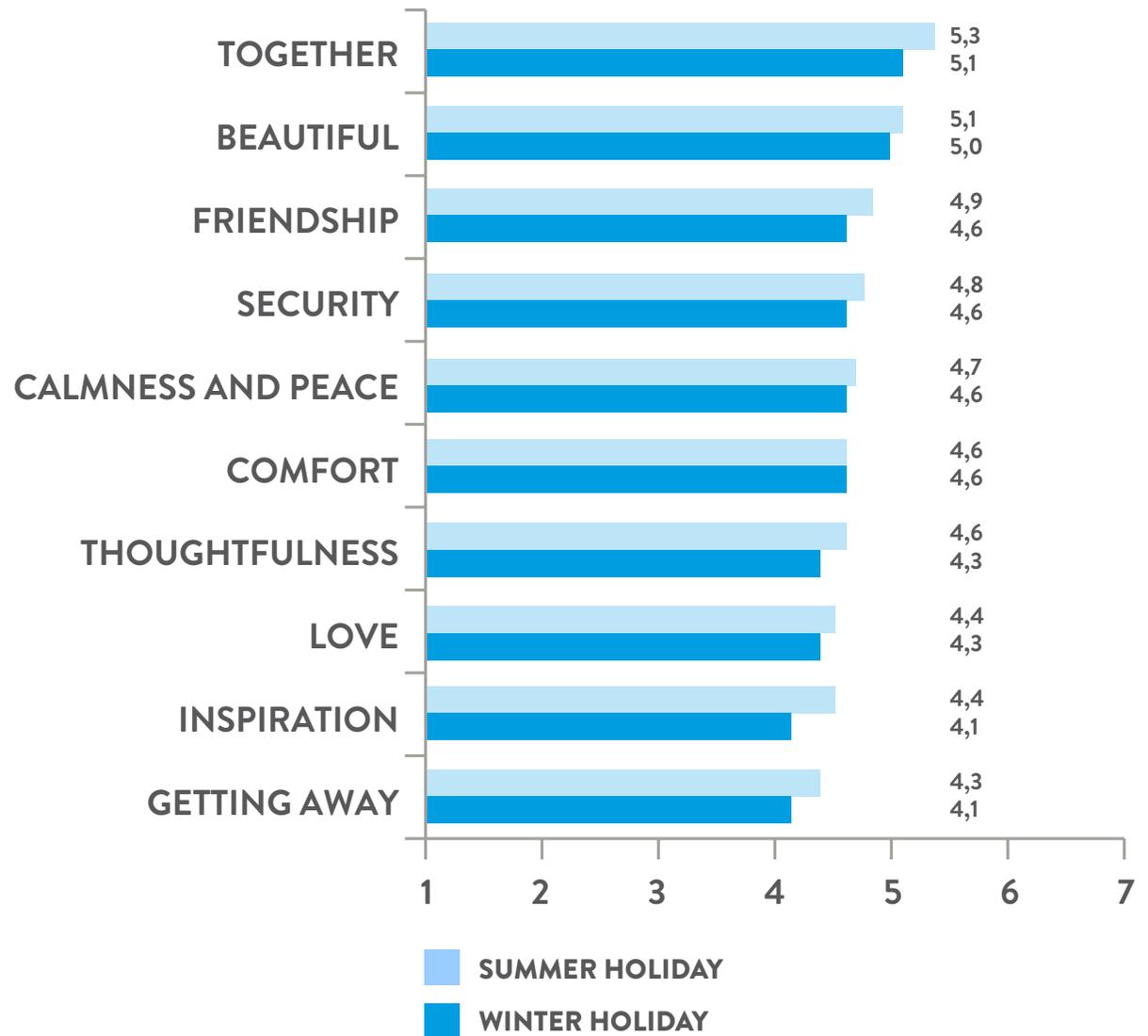


Fig. 14: Imagine that you are going to have a holiday in Sweden during which you will spend a considerable amount of time outdoors. How important are the following in ensuring that your holiday is as pleasant as possible? The diagram shows the 10 most important factors.

What is it that we find really important – if we dig a little deeper? How should we interpret and summarize the answers in this diagram? How should the pieces of the puzzle be analysed that we have come across in the discussion of outdoor experiences in the Swedish blogosphere and the international trendwatch?

BETTER ATMOSPHERE AND SENSUAL MEMORIES

A good atmosphere seems to be the unifying concept. Being with loved ones in an aesthetically pleasing environment where one feels safe and cared for is important. It may seem obvious. However, a good atmosphere is difficult to capture and easy to lose. It is thus about the highly abstract needs of guests that can easily transform into their opposites. Additionally, bad atmospheres have a quality that can be devastating. They linger and are difficult to erase.

So what is it that creates a good atmosphere? Music and candlelight are usually thought to enhance the environment. Nature provides many of the components for a good atmosphere, such as the elements in combination with sunlight. A clear winter sky in a high ceiling lodge is an atmosphere enhancer which can only really compete with an outdoor BBQ on a warm summer's night as dusk approaches.

FROM FUNCTION TO DESIGN

Our five senses: touch, sight, hearing, taste and smell, are the means that are available to those who wish to create a nice atmosphere. It is when these five senses are combined in the right way – linked to external conditions in nature and relationships between the people involved – that a good atmosphere arises, and lingers long after the experience

has ended. The Urnatur Company (see picture) has created a new kind of “camping site” where design, aesthetics and the five human senses come together.

Like other providers of outdoor experiences, camp site and ski resort owners of the future have to work with all of our senses – both in product and service development, and in communication. These become the tools for success, while the resources of the facilities represent only a base on which to build from.

CREATING A GOOD ATMOSPHERE IS ABOUT CREATING SENSUAL MEMORIES

Positive memories thrive on the use of sensuality as a tool. Once there is good atmosphere, time and space become meaningless. It is all about just being. Therefore, how we remember our camping holiday or ski week experiences is important. We need more sensual memories!

Fig 15. The air castle is the latest addition by the Urnatur company. It is like staying on a boat, but on land. It accommodates two people (double bed), veranda, gazebo on the roof, suspension bridge to the platform with a view. Concept and design: Håkan Strotz. Photography: Ulrika Krynitz. More information can be found at www.urnatur.se



BEAUTIFUL!

7

THE MILLENNIALS WANTS TO KNOW WHAT IS GOING ON

We live in an era in which we constantly have to make choices. It is up to the individual to choose everything from a spouse to an electricity contract. This is also true for children and young people. In the past, it was different. Back then, parents made choices for their children – they even decided whom the child should marry – and providence made choices for adults. However, with secularization and the emergence of modern society, new values and demands pushed the individual to make his/her own personal choices.

The “teenager” concept has been in existence for more than fifty years, and ever since the time when the 1940s generation was young, the period of youth has only become longer and longer. People “become adults” increasingly later on in life, and for a long time it appeared as if the new generations wanted to remain teenagers for their entire lives. They were referred to as the Peter Pan generation after the fairy-tale character who did not want to grow up.

ENTER “THE MILLENNIALS”

This changed with the age groups born in the end of the 1980s, and during the 1990s the situation changed. New values or rather revived values emerged in the young generation. The most important thing in life is no longer to realize one’s individual aspirations; rather, we have now seen a generation of young people burdened with responsibility and family values emerging in both Sweden and in the rest of the world. Collectively, we refer to them as the Millennials, with key fundamental values revolving around the little things in life. For eight out of ten people born in the 90s, the most important things in life are to find the right spouse, have children, get a good job and find a nice place to live. Previous generations’ ideas of making the world a better place seem to have vanished, with the exception for a small group among well-educated girls. “A nice car, a nice house and a cute puppy” are some key words for what the young generation aspires to. The 50s are back – not as a simple repetition but as a new version 2.0.

Basic values from childhood and adolescence have proven to last for a lifetime, if one, as a group, is not exposed to cataclysmic events such as war, natural disasters and major epidemics.

The new family-oriented values of the 80s and 90s may favour family-friendly holiday forms such as camping and downhill skiing, but they also are favourable for charter holidays. However, this is not merely a return of family values from the past. Individuals born after 1985 are just as demanding as previous generations. However, the demands are more focused on control and transparency. The age group born after 1985 is most focused on the little, intimate world with family and children.

HIGH DEMANDS OF PREDICTABILITY

They have sometimes been referred to as the spoiled generation because they have grown up with a high material standard of living. The Millennials also implies a desire for order. This means that they have high demands on predictability (and delivery reliability), while not lowering their expectations of powerful experiences and cosy atmospheres.

The Millennials individuals are also discerning and very familiar with new technologies. They are experienced travellers and have a strong sense of their own personalities, who do not mind acting in a group, but shy away from standard solutions. This is a generation that has not been called the “MeWe” generation for nothing. This places high demands of flexibility and responsiveness on the experience providers of the future.

“A nice car, a nice house and a cute puppy” are some key words for what the young generation aspires to.

IN THE ERA OF THE CURLING PARENTS, THE OUTDOORS ARE IN

Positive childhood experiences are often brought into adulthood and conveyed to one's own children. If one can win over one generation, one can also win over the subsequent ones. Families with children are therefore a key target group for providers of outdoor experiences with a long-term perspective. More than with any other group of customers, families with children ensure customers for the future.

However, it is not a given that young people will follow in their parents' footsteps nor would nature experiences be included on the list of their most interesting hobbies. Teenagers between the ages of 15 and 19 are very worried about environmental degradation, but there is not much interest in environmental issues and outdoor experiences. Computer games are more than three times more interesting than outdoor experiences and surfing the web is more than eight times more interesting than environmental and sustainability issues. In a report entitled "Outdoor Recreation in Change", the researchers are cautious to draw any conclusions with regard to the decline in outdoor recreation among the youth, because existing statistics are seldom capable of measuring the great range of outdoor recreational activities (some activities may have been replaced by others that were measured before and therefore measurements cannot be compared). While it is true that the activity of "strolling in the forest" has de-

clined among younger people, other types of outdoor activities may have compensated for this.

How can a teenager love the mountains just as much as his parents do? How can a teenager be persuaded to come along anywhere? Being mindful both of valuable "together-time" and of the child's development at the same time, parents are grateful for concepts that meet these challenges.

ARGUMENTS WITH REGARD TO THE VALUE OF OUTDOOR LIFE FOR THEIR CHILDREN ARE THE BEST WAY TO REACH OUT TO THE "CURLING PARENTS"

According to Bent Hougaard, the Danish child psychologist who introduced the concept of "curling parents" and "service parents" some years ago, "curling parents" are parents who sweep the path in front of their children so that they can quickly and easily get ahead in life (based on the winter sport of curling), as opposed to "service parents" who just service their children short-term without imposing any specific expectations of them. The best way to reach out to the curling parents is through arguments concerning the value of outdoor life for their children, as it is easier to influence children, rather than teenagers. Furthermore, the outdoor experience has a particular status for parents with younger children as well.

THE STATUS OF SPENDING TIME OUTDOORS

Spending time outdoors brings a status with it. An analysis of the discussion on the topic of children's play in Swedish blogs shows that parents are happy to embellish their

BLOG POSTS ABOUT PLAYING INDOORS
30%

BLOG POSTS ABOUT PLAYING OUTDOORS
70%

Fig. 16: Analysis of the blog posts about play, breakdown of outdoor and indoor games. Kairos Future 2011.

stories when their children have been outdoors! If a child played outdoors, the parents are happy to talk about how wonderful it was, without skimping on the details.

TOGETHER!



ONE COULD SAY THERE ARE TWO REASONS TO FOCUS ON CHILDREN AND YOUTH.

- Firstly, to safeguard long-term sustainability (assuming that what one knows, one will also want to protect).
- Secondly, to safeguard children's and young people's own development (the following chapters deal with the benefits of outdoor experiences in the society of the future).

EDUTAINMENT – EXPERIENCE LEARNING IS THE FUTURE

What is needed for edutainment to be successful is for it to be fun. Here, socializing with other children, youth and adults plays an extremely important role, as does the sense of success in that something new is being learned. Edutainment, experience learning is a rapidly growing trend (especially in Asia) that combines learning with games and entertainment. In Sweden, ski school is a given. The outdoor activities associated with the Skogsmulle fairytale is another old classic for younger children. Experience learning has the potential to expand into other areas as well. For example, the art of making fire can become a classic at the campsite. A key factor is to have just enough of a thrill for different age groups. If teenagers are to come along as well, more elements of risk are necessary. Furthermore, adolescence seems to be getting earlier and earlier – “tweens” are 8 to 12-year-olds who look like children but think like teenagers.

Photo: Niclas Ström

9

DO WE HAVE ENOUGH ENERGY FOR OUTDOOR ACTIVITIES?

More and more people live an increasingly sedentary lifestyle that has not been balanced by compensatory activities. Until the beginning of the 20th century, most of our needs for physical activity were met by carrying out our everyday activities. Since then, we move less and less in our everyday lives. Instead, training and exercise have become the focus. The proportion of the Swedish population that exercises regularly, defined as at least once a week, has increased significantly in recent decades from about 45% in the early 80s to 59% in 2002 / 2003. The SCB Time Use Surveys also show a slight increase in recreational physical activity during the past decades. For example, between 1990 / 1991 and 2000 / 2001 both the proportion of people who practised some form of “sport or recreation” on a normal day and the average time per day spent on these activities has increased. However, this increase did not continue into the 2000s (see figure).

600 CALORIES PER DAY TOO MANY

At the same time, we eat more and more. During the period from 1960 to 2005, average caloric intake increased by 7.5 per cent, or about 200 calories, and is now about 600 calories higher than the recommended nutritional intake for sedentary adults, the majority of the population. In practical terms, this means that one proper work-out per

day is more or less what would be necessary to compensate for the over-consumption of the average Swede. Seen from this perspective, it is not surprising that the proportion of overweight people has increased over the past 25 years, while more and more people exercise. One, two or even three sessions a week is simply not enough to compensate for the increased energy intake.

ARE YOU A SUPPORT MEMBER AT THE GYM AS WELL?

Furthermore, in spite of the increased proportion of people who exercise: A regular day still entails none or very little

physical activity for a majority of the population. The fact that the sale of gym memberships increases is not significantly related to increased exercise activity, as the congestion at the gyms in January quickly disperses when other interests take over. This means that our bodies are not very resilient when it comes to the strain of heavy backpacks on the hike. This may also have the effect of us not being able to manage a whole day on the ski slopes during the winter break and a need emerges for other activities like adventure pools and dog sledding. It can also affect the risk of injury when out-of-shape desk-job workers want to do a lot in a short period of time.

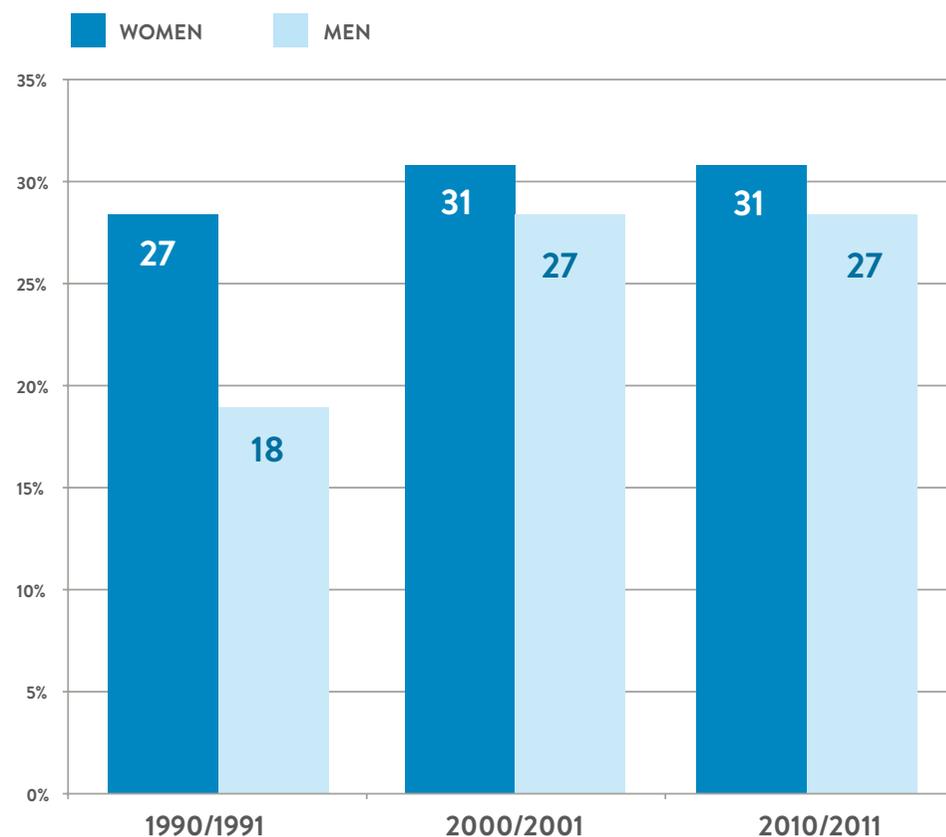
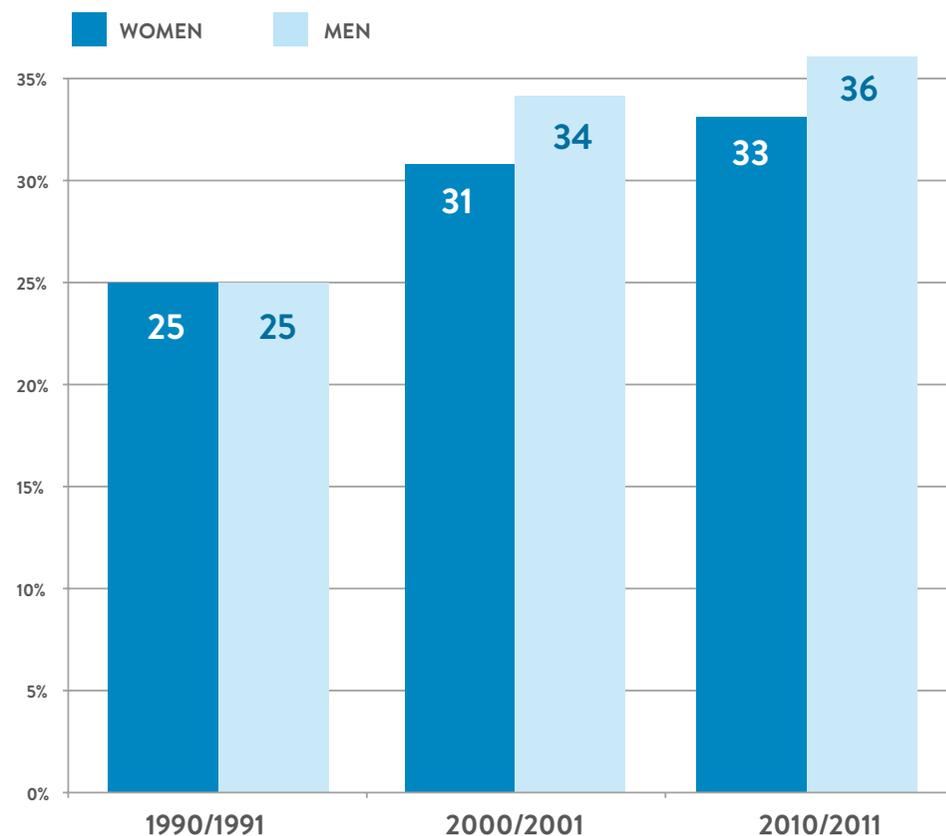


Fig. 17: Number of minutes per day that the average Swede spends on “Sports and recreation” according to SCB’s time use studies. Between 1990 and 2000, the amount of time increased for both men and women, but since then has remained level.

In effect, this entails an increased need for physical exercise to compensate for a sedentary lifestyle. Ski resorts report a strong increasing interest in cross-country skiing, which involves harder exercise and using technologically advanced equipment, rather than “going out” with a hot chocolate and a grilled cheese sandwich in a backpack. Major races like Vätternrundan and other running competitions report increased participation pressure. Tour operators report a strong increasing interest in exercise trips abroad. The motivation is about reinforcing one’s own brand (being strong, fit and good-looking) and coping with a demanding everyday life (this perhaps mostly concerns high-performing individuals in management positions). Here, there is clearly a motivation that Swedish providers of outdoor experiences could also seize.

33%
*of women spend
time on sports and
outdoor activities*

Fig. 18: Proportion of Swedes that spend time on “Sports and recreation” according to SCB’s time use studies. The number increased between 1990 and 2000 for both men and women, but has since only increased slightly.



10

THE OUTDOORS IS USEFUL IN THE THOUGHT SOCIETY

Today, about 70 per cent of Swedes are employed in the service sector, and the majority of them are in more or less knowledge-intensive parts of the sector. Thus, the challenge of the 2000s – observed by management legend Peter Drucker in 1999 – is finding a way to succeed in our knowledge-based work as we once did in manual work during the 20th century, namely to increase productivity fifty-fold. There are many indications that we will manage to do just that. As a result, much of what we considered to be relatively skilled work today will one day be taken over by “super computers.” Everything that can be standardized and automated will be handled by computers. This involves customer service, decision support, analysis support, communication, information collection, etc.

TOMORROW’S MOST SOUGHT AFTER TALENT: COOKING HOTCHPOTCH?

If computers take over all knowledge-based work, what are the knowledge-based workers supposed to do? Human-to-human relations? Perhaps, but there are also studies showing many people, at least in Sweden, are often more satisfied with “machine services” over human services. So, even psychologists, therapists and counsellors may eventually be replaced by their online automated counterparts. One area where supercomputers definitely cannot compete with people (at least not yet) is in conceptual and creative thinking. It is difficult to imagine that a machine would assemble concepts around the iPod or Skype, examples of some of today’s most successful products and services. In other words, it will become more important to be good at “cooking a hotchpotch” of various components.

THE QUEST FOR THOUGHT PRODUCTIVITY

Even if we leave the more utopian (or dystopian) aspects of the automation of knowledge-based work out of the equation, it is clear that thinking is “the new black”. If we want to increase productivity in the economy (by extension, our material well-being), this must be done within the “knowledge sector” because in the long run virtually the entire economy is moving in that direction. The automation of knowledge processes is only one way. The second approach is to increase the value per unit of time, and this is about increasing the number of “Aha! experiences” per unit of time. Furthermore, if we move down to the individual and company level, we notice that the importance of this increases further. The quest for thorough productivity has begun!

This means that the mind will have to focus more often. The mind also needs to be trained and needs time recover, just like the rest the body needs to recover after physical labour.

DO OUTDOOR AND NATURE EXPERIENCES INCREASE PRODUCTIVITY IN THE ECONOMY?

Then what does this have to do with the outdoor experience? Yes, it really seems like spending time in nature is extremely important, both for the recovery of the mind and for creativity.

A research report from the University of Kansas 2012 shows that hikers who had been in the wilderness for 4 days showed marked cognitive improvement, for example, their creativity was improved by 50% compared with other hikers who had not been in the wilderness.

“We’ve got information coming at us from social media, electronics and cell phones,” said Atchley, associate professor and chair of psychology at KU. “We constantly shift attention from one source to another, getting all of this information that simulates alarms, warnings and emergencies. Those threats are bad for us. They sap our resources to do the fun thinking and cognition humans are capable of – things like creativity, or being kind and generous, along with our ability to feel good and to have a positive mood.”

Research on how the brain is affected by the intensive use of technology is still at an early stage, but is rapidly gaining in significance. Several studies show that the mind is able to focus better when it is away from email, mobiles and city noise; nature facilitates this.

Researchers at the University of Michigan have shown that people are able to learn better and focus after a walk in the forest than after a walk along a busy road (20% improvement in memory after an hour in nature).

DECIDUOUS FOREST BY PRESCRIPTION

However, nurturing creativity is not the only thing a stay in an outdoor natural environment can be recommended. Outdoor experiences play an important role when it comes to alleviating stress as well. Research done at SLU shows that a daily visit to a forest with deciduous trees reduces mental illness and stress. In her doctoral thesis at SLU, physician Matilda Annerstedt focused on providing a medical slant to the links between spending time in nature and health. She has found that nature-aided therapy may be an effective treatment for various diseases, such as obesity, schizophrenia and depression.

In a few population studies, she investigated the importance of proximity to and spending time in different forests on the stress levels of individuals. It seems that access to deciduous forests is important for stressed individuals, possibly even more important than pine forests. The research was partly conducted in a laboratory where a forest environment was simulated using sounds and pictures (see picture).

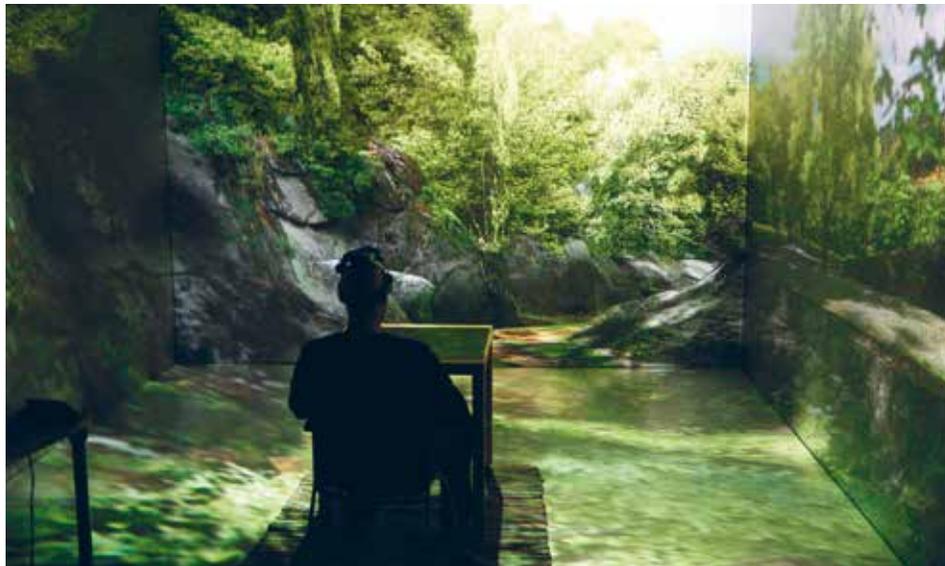


Fig. 19: SLU, Annerstedt, Matilda. Stressed participants were allowed to recover in a virtual laboratory with a forest environment. Photo: Mattias Wallergård.

NATURE AS A CURE AGAINST LIFESTYLE DISEASES

The results are interesting because a large proportion of the world's health problems today are characterized just as being stress-related disorders and other mental conditions. Hence, it is important to preserve and expand the green spaces of cities and surrounding areas, and plan for a good, green quality in new residential areas. According to a study by the University of Illinois, it even seems that the view outside the window affects people's ability to deal with life's challenges. In a survey done by Kairos Future / Husqvarna of people in Germany, France, Russia, USA, Sweden, Poland and the UK, it was found that significantly more people (64%) chose to go to a park or green space to relax than to a café (18%).



Fig. 20: Where do you go to relax? Source: Kairos Future/Husqvarna 2011.

FROM QIGONG TO FOREST WALKS

For outdoor enthusiasts, research is perhaps superfluous. Most people have always had the intuition that you can think better on a sail boat, in the mountains or in the forest. However, it is probably time for providers of Swedish outdoor experiences to embark on delivering and communicating more consciously what will perhaps be the key factor of this century: the conditions for thought productivity. Asian culture has long dominated the notion of mental health being linked to movement (Yoga, Qigong, etc.). Is it time for Sweden to highlight its classic "Forest walk"?

NERDS AND WANNABES COMPLETE YEAR-ROUND BUSINESS



Many organizations and players acting within the area of outdoor experiences speak of challenges that have to do with a generational shift, both of business owners and people who take part in these activities. There is not just one solution to these challenges. When it comes to marketing, it may sometimes suffice to increase or improve it, but it is often a question of modernizing products and structures. In a context of increasing competition for people's time and money, one can see a clear niche: thematization and specialization, since it is hard for one particular element to be *really good* for everyone.

**RECOMMEN-
DATIONS**
PAGE 54

SEGMENTATION ACCORDING TO NEEDS AND DEMANDS

An important trend affecting the outdoor experience of the future has to do with the increasing segmentation of society, affecting both product and service development and marketing. In the past, it was easier to divide people into clear categories of “families”, “pensioners”, etc. This is now becoming increasingly difficult because firstly, we are behaving in an increasingly unpredictable manner, “zapping” between different identities and roles depending on the situation (sometimes a business traveller, sometimes on parental leave, sometimes with a group of friends in search of action, sometimes in need of child-safe environments, sometimes interested in culture, sometimes in need of connectivity for a moment of work). Secondly, we become increasingly deaf to information and advertising. Selectivity in what we choose to listen to becomes a survival strategy in an era when we are bombarded daily by thousands of messages. This has implications for all who want to reach out with their messages and offers to the customer. Before consumers open their eyes and ears, they think “What’s in it for me”.

THE NEW SMART MARKETING: THINK MORE, PRINT LESS.

From having worked with marketing to the masses to using different types of psychographic segmentation (motives and interests), we are now heading towards a more sophisticated, in-depth segmentation. In order to successfully capture people’s attention, it has become increasingly important to have a deep understanding of their needs and desires. What do they desire? How can we deliver added value to them in particular – even in such things that they are not aware of themselves? Put simply, one can say that the difference is in the need to focus a little more and invest fewer resources on general brochures.

NERD-BASED SEGMENTATION

The “nerd” segment is becoming interesting in new marketing; that is to say, those who have distinct interests and are easy to “identify” and study.

Example: climbers are interesting as a target group as they are happy to start climbing early in the season and go on until late in the season. They are often organized into clubs (there are approximately 6,000 members in the Swedish Climbing Association) and buy a certain type of equipment and clothing in outdoor shops (relatively easy to reach). By talking to climbers, studying their discussions on websites, one gets a better understanding of what is important to them. It becomes possible to customize offers and communi-

cate with them through, for instance, a club channel. In this situation, more resources have to be put into the thinking and creating packages / concepts, but the communication itself becomes cheaper.

MORE EXAMPLES OF NERDS AND WANNABES

Cyclists form a larger target group that has seen success, especially in Mallorca. Every spring, Mallorcan roads (and lodgings) fill up with northern European cyclists who want to get a head start on the season for Vätternrundan (23,000 participants plus families and others who come along) and other events. By conducting a deep study of their needs, Mallorca has adapted the offer (e.g. transport for racing bikes, organizers specializing in services connected to cycling, accommodation facilities in appropriate locations, route suggestions) and communicates with this niche target group. These people are also reached through clubs, specialty tour operators and specialist bike shops, not to mention at Motala square during one particular weekend in June. There are also good opportunities for cooperation between different companies, provided that there is added value for everyone involved, including discounts to club members, lectures for shop customers, or directed offers extended during events. Besides cycling, nerds themselves or biker wannabes can be keen to use the same strategy. Vätternrundan dreamers, or simply those who like to bike, can join in without signing up.

GREAT OPPORTUNITIES FOR BOTH BIG AND SMALL ACTORS

In some ways, marketing becomes trickier as it requires more thought, and an adaptation of the product is necessary to some extent. It can become easier as well, though, since very small players without large marketing budgets can reach out to interesting target groups. On the whole, the new logic is necessary because consumers choose to listen to information that is interesting to them. A climber may not see the ad about camping in Västervik, but he becomes attentive when the word “bouldering” is mentioned, a cyclist ignores the term “ski lift” but pays attention to expressions like “cadence on steep hills” and “dietary guidelines for bicycle races.” However, when it comes to wider audiences such as “families with children”, one has to think hard about what they really crave. If they have no previous experience in camping, perhaps it is not the word “camping” that should be used, but something else entirely.

Of course, the on-site consumption selection also needs to be adapted to particular needs and desires. Climbers will perhaps not double the sales figures for chewy raspberry candy. Cross-country skiers do not contribute to the sales of back plates. Cyclists refrain from water slides. Rather, it is all about figuring out what they want to consume.

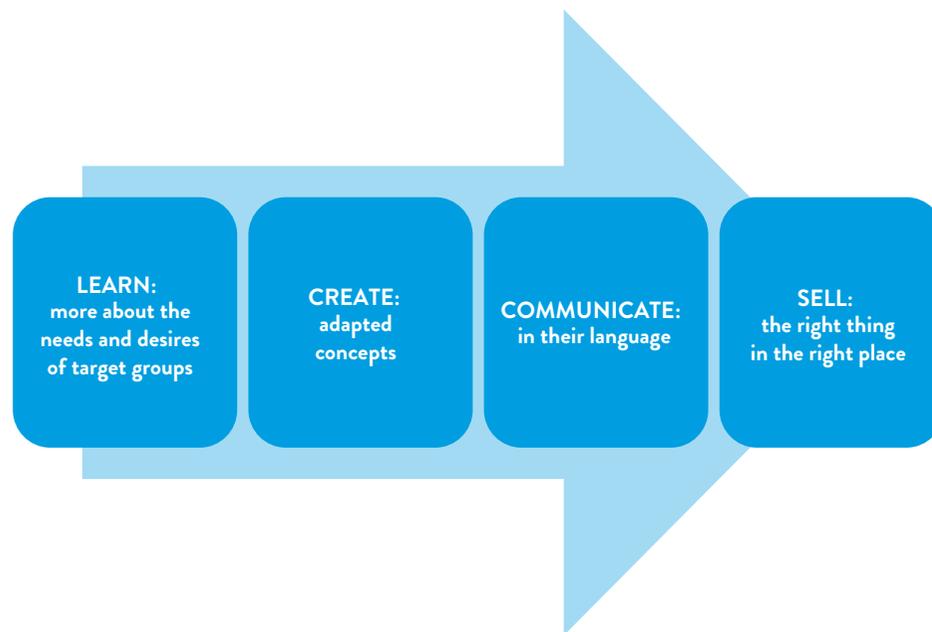


Fig. 21: New target groups are attracted to new concepts; the consumption is controlled by their particular needs and desires.

SEGMENTATION ACCORDING TO CLASSICAL TARGET GROUPS

A FORGOTTEN TARGET GROUP - THE IMMIGRANTS

The discussion above is about the new marketing strategies that go from a traditional division of sociodemographic criteria for marketing according to a focus on people's needs and desires. However, if we look at such a simple criterion as people's origin, we can conclude that people in Sweden who were born in another country are the ones who are the furthest from the idea of various outdoor experiences. Approximately 15% of the Swedish population today was born in another country.

Of course, this is a very heterogeneous group. Most have admittedly not experienced the Mulle tradition, but for some, Swedish has become a natural first language, while for others the language is still a major barrier. More than half come from Europe and Finland, Norway and Denmark are among the top ten countries of origin. Our nearest neighbours are accustomed to outdoor experiences in Nordic nature, but those coming from further away have a greater need for package-deals and availability of outdoor experiences.

Being born abroad is a very rough classification of a group that does not have much else in common. There is a need for work with segmentation by interests, needs and desires for these people as well. A natural approach would be to look for cooperative partners such as cultural associations, congregations, Swedish for Immigrants (SFI), and other similar organisations in order to reach the target group and perhaps work together to create appropriate and attractive concepts.

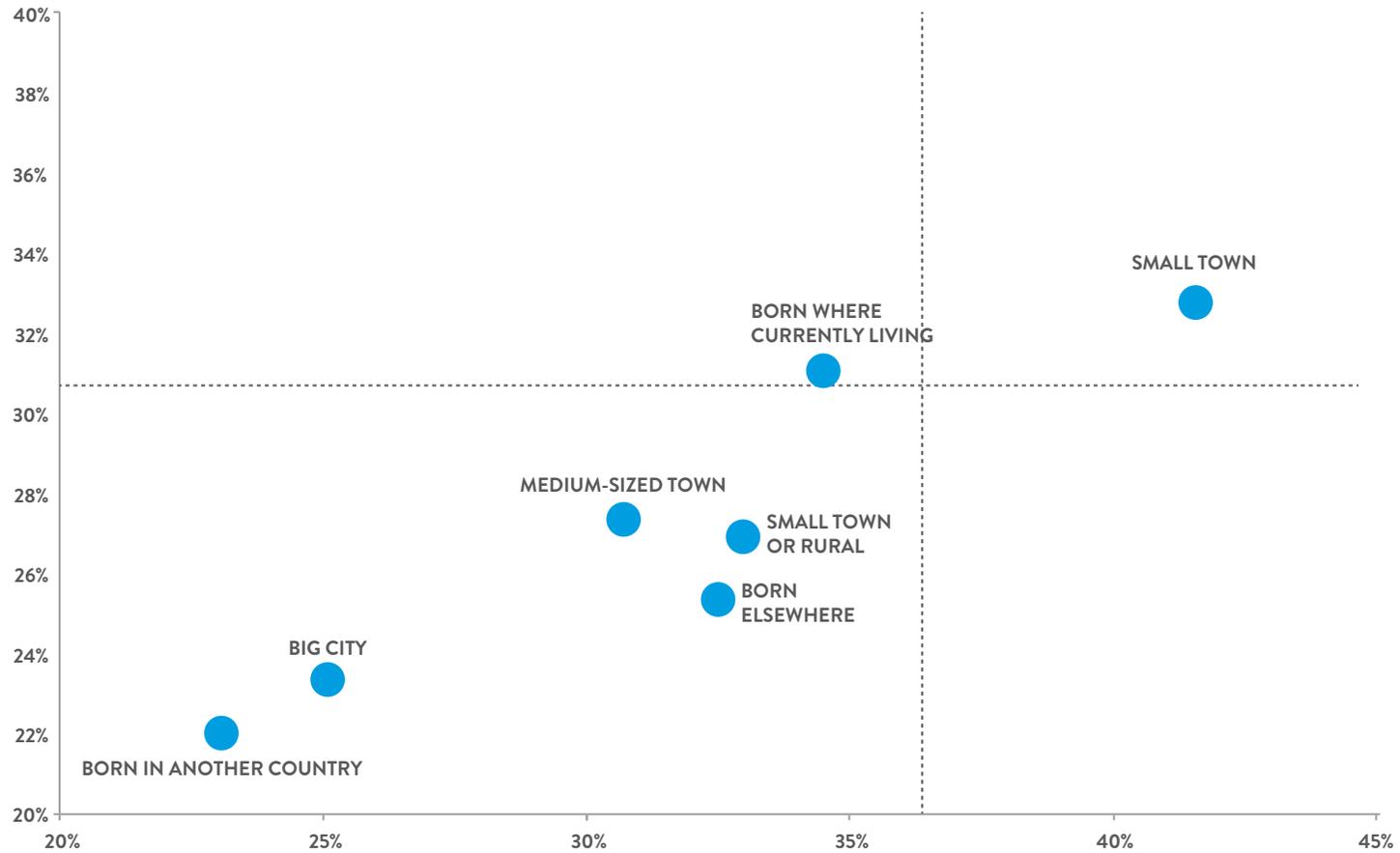
GROWTH POTENTIAL EVEN AMONG PENSIONERS

Analyzing how the place we are born affects our interests, and taking camping and skiing as examples, it is clear that an interest in camping is about as low among people from Sweden's three largest cities as it is among people born abroad. The older age groups have a low interest both for ski holidays and camping, and guests start dropping off when the children reach their teens. With regard to this topic, we can note that we have well over a million pensioners in Sweden alone. In this case as well, the division of age is too rough to function in terms of segmentation and is necessary to separate the group into different interests and even according to physical abilities. Good cooperation partners are pensioners' associations, educational associations and interest groups.

FAMILIES WITH CHILDREN WILL NEVER FILL UP THE FACILITIES ALL YEAR ROUND

The most common target group is families with children, and it will remain so for the foreseeable future. However, that is not enough to fill up the facilities year-round, so it's time for a new way of thinking!

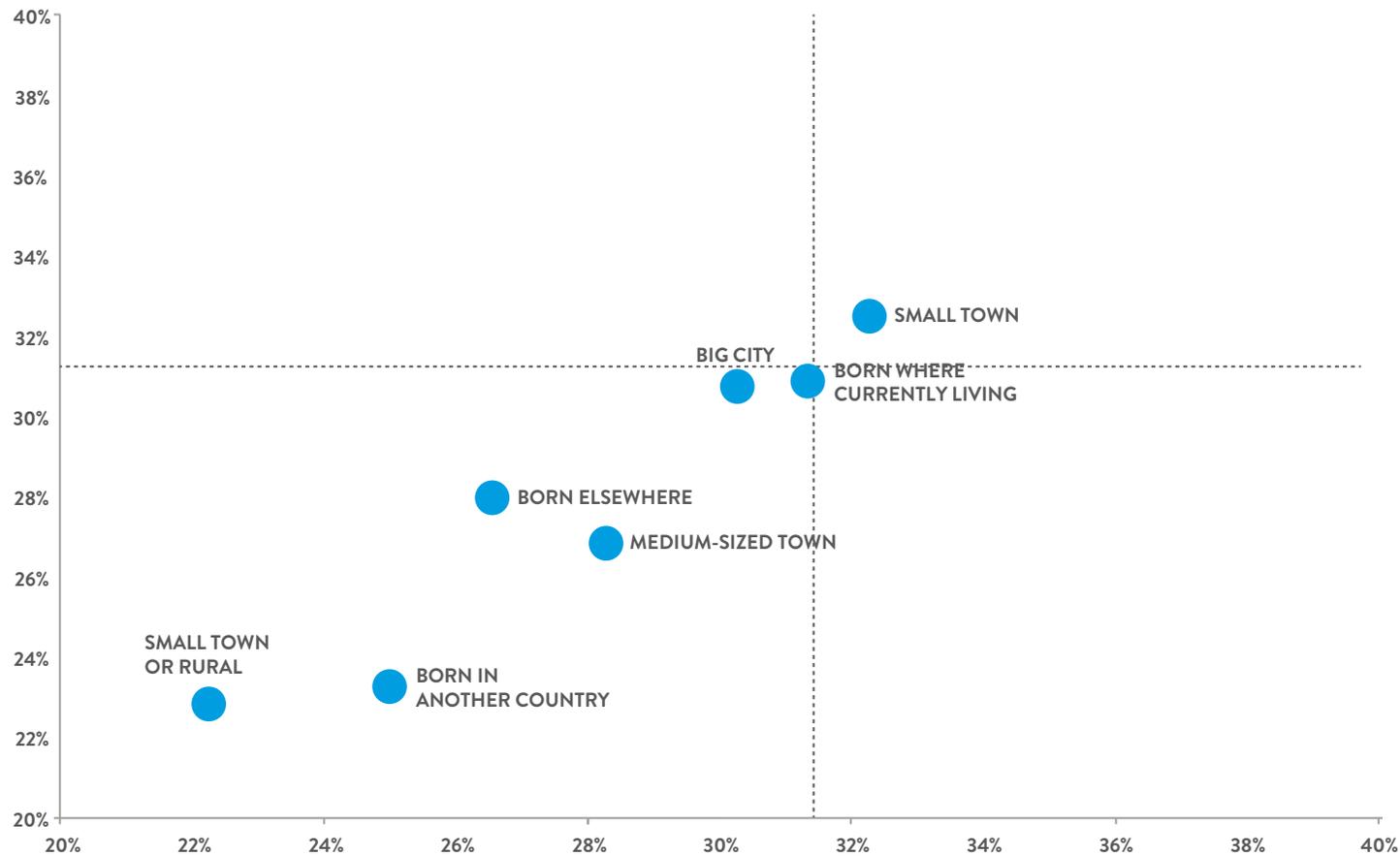
PLANNING A CAMPING TRIP IN 2013-2015



HAS BEEN ON A CAMPING TRIP 2010-2012

Fig. 22: Proportion of people who say they have been on a camping / ski trips in the last three years versus those who plan to do so within the next three years. Survey in February 2013, the sample is representative of the population in Sweden in terms of sex, age and geography.

PLANNING A SKI HOLIDAY 2013-2015



HAS BEEN ON A SKI HOLIDAY 2010-2012

Fig. 23: Proportion of people who say they have been on a camping / ski trips in the last three years versus those who plan to do so within the next three years. Survey in February 2013, the sample is representative of the population in Sweden in terms of sex, age and geography.



Photo:
Niclas
Ström

THE OUTDOOR EXPERIENCE OF THE FUTURE



Based on the knowledge of the current situation and trends ahead, how might the outdoor experience develop in the future? In the preceding pages, we have portrayed definite trends that will impact the future of outdoor experiences. However, in order to complete the picture, we need to take into account the uncertain variables, too, of which the direction, scope and speed are difficult to assess, but can be of great importance for future development.

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UNCERTAINTIES TO TAKE INTO ACCOUNT

Those who take part in outdoor experiences and facilities are affected not only by current trends, but also by uncertainties, and those effects are difficult to assess. **Growth and the economy in general** are difficult to predict, especially in many important foreign markets. There is also a certain uncertainty when it comes to the Swedish **government's will to prioritise tourism** as the new primary industry, particularly in terms of legislation and infrastructure development.

The climate has an impact over the longer term, with effects both in terms of warmer temperatures, bathing water quality, access to snow, epidemics and mosquito infestations among others. Furthermore, we already see a certain **conflict with regard to use of land** between parties with different interests. The right of access to privately owned land is unique to Sweden; how will it be interpreted in the time to come?

The consequences of **the digitalization and development of technology** are difficult to assess. Surely, mobile technology in particular is going to help reinforce some outdoor experiences and arouse curiosity. However, the development of digital experiences will most likely steal attention away from experiences "in real life". How strong will this development be?

The attraction of the industry as an employer (currently known for inconvenient working hours and low salaries) is another factor that can affect resource supply in the future when the fight for talent intensifies. No less important, **the industry's own motivation and will** are going to grow, be professionalized and develop in the years to come. Will the generation shift be a boon or a bane to this industry?

In the following scenarios, we have chosen to focus on **two uncertainties particularly central to the future development of the industry that revolve around the outdoor experience.**

UNCERTAIN VARIABLE A: THE RATE OF GROWTH FOR THE TOURISM INDUSTRY

The success of the outdoor experience depends on how tourism and travel in general, and in Sweden in particular, will develop (which in turn is linked to several other uncertain variables such as transport costs, the global economy and political priorities).

If competition between the different transport options (mainly airlines) continues to keep travel costs down even for longer distances, Sweden can be a competitive

destination. In addition, if there is a relatively rapid recovery of the global economy, then the prospects are good for a healthy growth rate for both domestic and inbound tourism.

On the other hand, should there be a significant rise in transportation costs due to increasing fuel costs, reduced competition between different transport companies or surcharges in order to curb travel due to environmental reasons, this is also likely to affect travel to a relatively distant destination like Sweden. Travel within Sweden may also be curbed (these effects are however difficult to assess as higher fuel costs may also lead people to re-assess their priorities and prefer to stay in Sweden rather than going abroad). The pace of recovery in the economy will naturally have at least as great an effect on travel, especially on the neighbouring markets important to Sweden.

UNCERTAIN VARIABLE B: THE INDUSTRY'S MOTIVATION AND DESIRE TO GROW

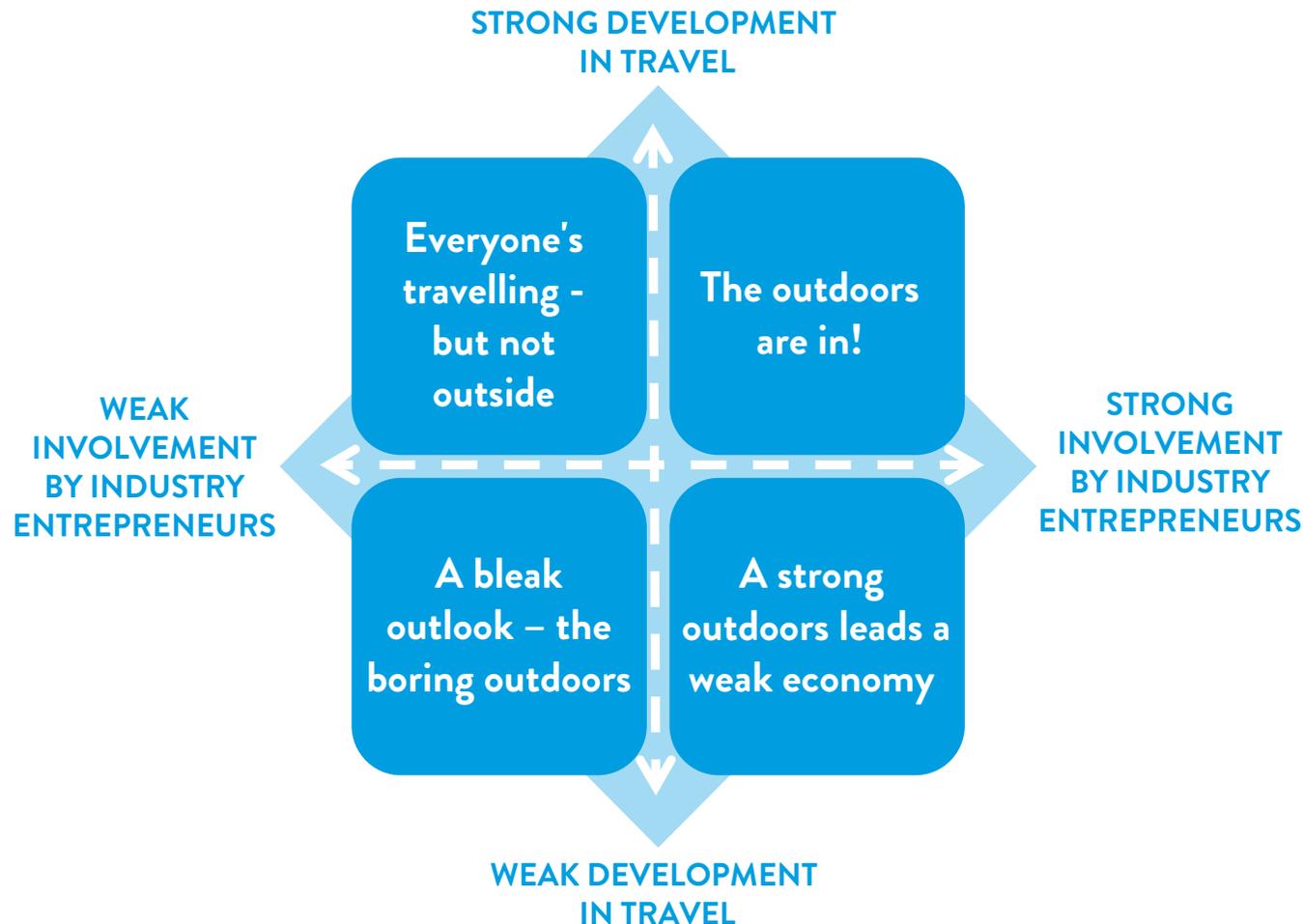
Another important uncertainty variable is the will of the outdoor companies (the industry) to invest wholeheartedly in the development of the business as time goes on. With intensifying competition for peo-

ple's time and money, it is no longer sufficient with "business as usual" and aiming at maintaining the status quo. It is easy to fall behind and underestimate the rate of change and the ever increasing demands. Vigorous efforts are required to achieve an increased rate of growth and year-round occupancy. If the industry invests heavily in professionalization, co-operation, takes advantage of economies of scale, successfully positions itself to make use of financing and venture capital, and, in addition, dares to try out new methods of product / service innovation and succeed with the generation shift, the industry will be in a good position to expand its share of the household experience budget. If the industry continues in the same rut, it is possible that the proportion of the household budget will shrink instead.

If you put together these two uncertain variables in a four-panel diagram, four different scenarios are revealed.

The consequences of the digitalization and development of technology are difficult to assess

FOUR SCENARIOS FOR THE DEVELOPMENT OF THE OUTDOOR EXPERIENCE INDUSTRY, FOR 2020



We will start with the bleakest scenario where the growth rate of the tourism industry has not reached the desired levels. The economy in Europe, so important for Sweden, takes a long time to recover and the exchange rate of the Swedish krona is unfavourable to affluent foreign tourists. In this scenario, Swedish tourism has not managed to compensate for the loss of foreign guests either. It is difficult for providers of outdoor experiences to get the guests who remain to consume on the spot. This is due to the fact that product development has stalled and the offers that are available no longer attract discerning guests. Additionally, no one has progressed further towards the goal of a year-round business because it would have required a more wholehearted investment in product development in order to reach new target groups with new concepts. Some people argue that lazy, fat cats slow down the industry; others point to problems with the financing of new projects. The professionalization of camping sites and ski resorts has slowed down, which has caused financiers to become hesitant. The cooperation between various key actors with outdoor experience, which started off so promisingly around the year of 2010, has halted and the economies have thus failed to materialize. Municipal ad-

Fig. 24: Four scenarios for the development the outdoor experience industry, for 2020.

ministrators have not bought the idea that tourism is the new primary industry and refuse to do their fair share. Many also blame the generational shift that has not worked out satisfactorily; the young talent selects other industries in which to invest their energy and ability, and the older ones that remain in the industry are not motivated to continue developing any further. Industry representatives complain about the digital experiences having gained ground, not primarily as a reinforcement of the traditional outdoor experience but as a more exciting alternative. The outdoor experience has become boring.

EVERYONE'S TRAVELLING - BUT NOT OUTSIDE

In the second scenario, the economy has picked up well and travel to and within Sweden is booming. The domestic and foreign tourists rejoice about the new exciting cultural offerings and enjoy travelling on shopping holidays to the cities. The onslaught of Chinese and Russian tourists has increased overnight stays in those major cities which have been quick to adapt their offerings. The outdoor experience has lost its allure and has not really kept up with the increasing consumer demand for packaging and conceptualization. It is so much easier to book a trip abroad than to try to get to the mountains and be stuck in traffic jams. Admittedly, skiing has increased in popularity, but people would rather choose the Alps or any of the new ski destinations in other parts of Europe that have succeeded in broadening their of-

ferings and delivering better quality and more service for the money. Furthermore, from a comfort perspective, few are ready to put up with the discarded service houses and shabby cottages of the camping sites. There might be a charm in having a simple holiday, but not an untidy, cold and ugly one.

A STRONG OUTDOORS LEADS A WEAK ECONOMY

In the third scenario, providers of outdoor experiences have made vigorous efforts to develop their offerings and their businesses. They have worked hard to coordinate their efforts and created economies of scale in areas such as training, the purchase of certain products, information, marketing and booking. At an early stage, some facilities began to introduce the so-called experience guarantee which ensures that the highly valued holiday time turns out as intended. If there is a problem of some kind, compensation is granted in the form of extra days.

It is an innovative industry, with motivated and committed entrepreneurs and employees. Study visits from different parts of the world offer proof of the success. The joy of success is, however, tempered by the inert economy, which has slowed down the growth of tourism. Although the outdoor experience is considered the sector of the industry that has had by far the strongest performance, the dividends on investments are not quite what one had hoped. How-

ever, in comparison with classic shopping and cultural destinations, ski destinations and camping sites have managed to increase their shares of the household experience budget. Furthermore, new technology is used to enhance the outdoor experience in a way which is very much appreciated by the consumers.

THE OUTDOORS IS IN!

In the fourth scenario, everything has worked out ideally. The economy and the travel industry are flourishing and the outdoor experience has reached new heights as the most rapidly growing sector of the experience industry. After some years of diligent work, many facilities have achieved sufficient year-round business. By actively working with new target groups and niche interests and by considering year-round activities in the planning of new areas, one has succeeded in arousing interest in new seasons. Mushroom-picking courses, biker-weeks, events for people on parental leave, Chinese for pensioners, all are examples of themes that have been important to the success. For several years, efforts to adapt outdoor experiences and the marketing of these on new markets further and further away have intensified, which has led to experience facilities reaching out to the entire population and receiving a good mixture of visitors from around the world all year round. For people who come to Sweden from other parts of the world, whether as migrants or during

the holidays, experience facilities are often natural choices for getting to know the power of Swedish nature. The industry flourishes and has amply demonstrated that it belongs to the new Swedish primary industry. The intensive cooperation toward professionalizing the industry is an important explanatory factor for success.

*The
outdoors
are in!*

IDEAS ABOUT IMPORTANT STEPS ON THE WAY

Which scenario is the most probable? Which is the most desired? Scenarios serve the important function of illustrating the potential development paths in order to be able to discuss these issues in particular and to enhance future preparedness.

In March 2013, a group from the industry concerning outdoor experiences, mainly from the SCR and SLAO organizations, but also experience designers, communicators and entrepreneurs of various kinds, got together to take part in a workshop on the future. The workshop projected 10 years ahead, and common ideas for important steps towards the fourth scenario, a thriving business, were developed. Some of the ideas are listed below. Some steps are easy to predict, others are more groundbreaking. Some are serious, others put forth are tongue-in-cheek. The challenge of predicting the future is that something which may seem unlikely now, but may seem very obvious in retrospect when someone has proven that it is possible. The Ice Hotel in Jukkasjärvi is a perfect example of this.

2015 – THE OUTDOOR EXPERIENCE HAS ITS URBAN BREAKTHROUGH

Several providers of outdoor experiences now have a presence in the urban environment, where, among others, campers and skiers live their everyday lives throughout the year, either through their own events and facilities or through co-operative partners. The ski-mulator is well distributed throughout the country's cities, this is where one gets into shape to be able to cope with maxing out the "real" ski week. Several facilities have also started working with various study associations and retail outlets for outdoor equipment and they organize courses and lectures together.

2016 – THE SWEDISH ALL-INCLUSIVE CONCEPT IS ESTABLISHED; PRODUCT DEVELOPMENT AND CONCEPTUALISATION FLOURISH

This is an important year in the professionalization of the outdoor experience as some providers of Swedish outdoor experiences incorporate the all-inclusive concept, inspired by the successful concept of charter destinations. Here, the cooperation with different actors and entrepreneurs at the destination plays an important role; through a more intensive cooperation, clearer reasons for the trip are created resulting in higher occupancy for activity organizers and others.

Another important innovation launched is a kind of butler service that facilitates the

maximization of the experience and eliminates stress factors. The types of services that can be booked include: welcoming log fires on arrival, help with parking caravans (attested to as being stressful for many), chef-for-hire, barbecue bag for the camp site / mountain slope, cleaning and similar convenience services, as well as services to increase the cosiness. These services enhance the quality of the experience and minimize the time required for boring / stressful tasks.

Collaborative camping is another concept that is being launched around this time. The concept has emerged out of people's awareness of finite resources, but also out of the desire to spend time together. This "co-creation" camping is driven largely by guests who register for sessions and offer their abilities. Someone cooks, another talks about flora and fauna, a third teaches kids to swim. The cost of the stay depends on each person's contribution to the common cause.

2017 – SOU (SWEDISH EXPERIENCE ORGANISATION) IS ESTABLISHED

Another major milestone is when the SOU, Swedish Experience Organization is established by, among others, SCR and SLAO 2017. The aim is jointly to professionalize the industry, maximize economies of scale, intensify cooperation in education and recruitment, among other things. The common organization is a natural evolution of

an increasingly intense cooperation that started in 2012.

2018 - QUALITY AND ENVIRONMENTAL CERTIFICATION BECOMES STANDARD

A major investment in quality food, locally produced and organic food is now starting to have an impact around the country. Swedish culinary standards for the experience industry are established. They serve as a guide for increasingly discerning consumers. Around the same time, environmental certification is introduced for facilities that are self-sufficient in energy; an important step especially for ski slopes where the foremost among them have implemented advanced systems for slope thermoplastics that enable an extension of the season and prime skiing conditions from early autumn until late spring. As a bonus, a new type of tourism has emerged: technical visits by guests from the Alps among other places but also prominent ski destinations in the U.S. and Asia that study the innovative technology.

2019 - NATURE HOLIDAY WEEK IS LEGISLATED TO PROMOTE GDP

In 2019, the state establishes a statutory nature holiday week as a consequence of the realization that nature is a tremendously important resource in the prominent thought society. Nature is now used more systematically as a source of health and rehabilitation, and some time spent in

the forest is commonly prescribed as an alternative to antidepressants and sedatives. Nature holiday week aims to encourage the increasingly urbanized population to get out into the greenery and regenerate not only the body and mind but also optimize thought productivity.

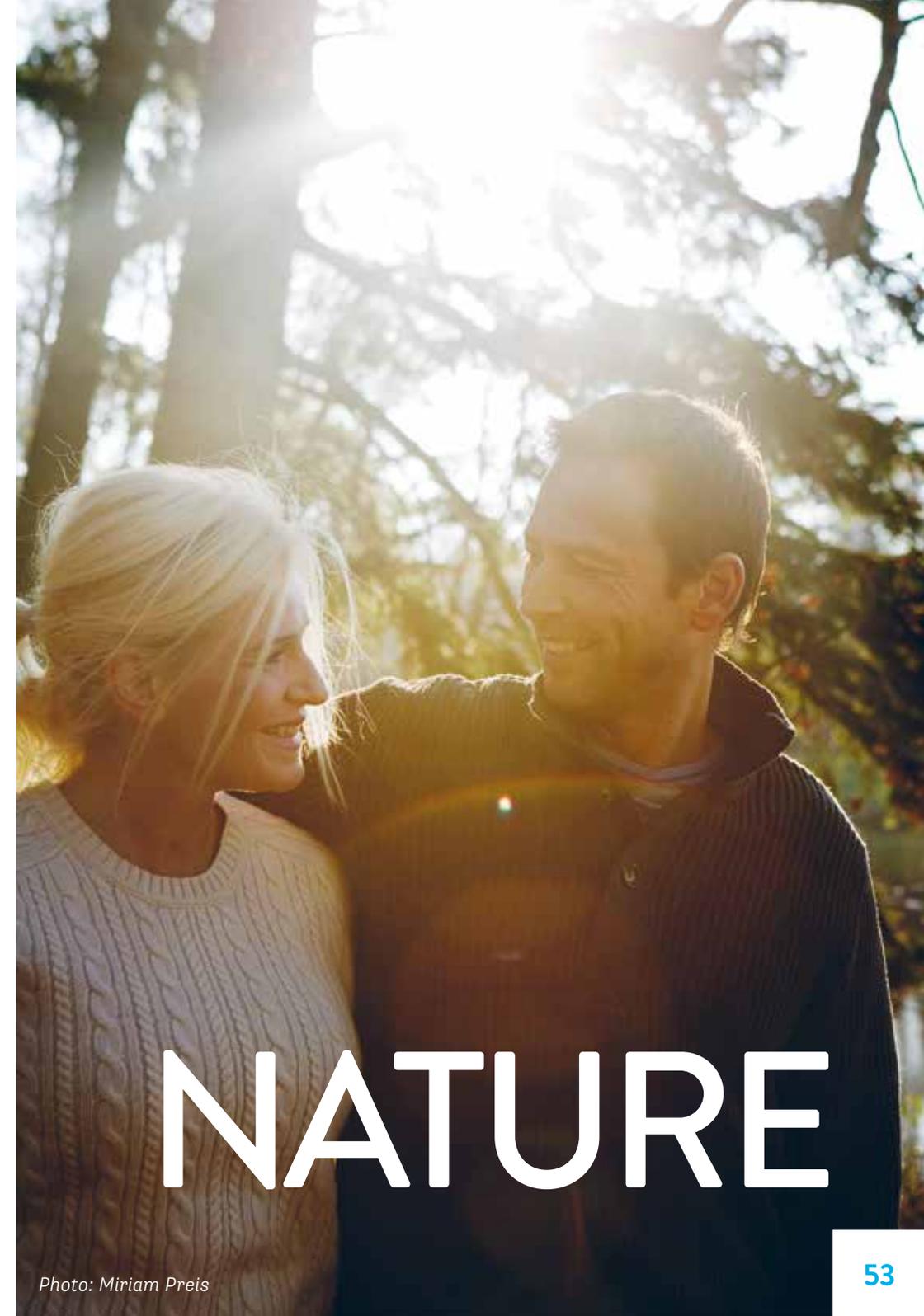
2020 – THEMED EXPERIENCE FACILITIES ARE THE NORM

Once the experience industry grows and is professionalized, there is a growing need for targeted and themed camping sites and ski resorts, in 2020, almost all facilities are specialized in some way. Concepts like “camping” and “ski resort” are used less and less, due to the diversity of activities and specializations offered. The overall concept has become the experience facility. A distinction has also been made between the facilities that have been developed in pace with the new technology and some of those who have chosen to remain outside and instead focus on back-to-basics, where the focus is on being in the here-and-now and in experiencing it with all five senses.

It remains to be seen whether the development will take place in this particular way and if these particular steps will materialize. The ideas about important steps in the development bear witness to an investment in more cooperation, better quality, sustainable development, innovation and better adaptation to consumer needs. In line with this, in the final chapter, we draw

conclusions and give recommendations around the key areas of focus ahead for future-oriented experience producers with a focus on the outdoor experience.

Nature holiday week aims to encourage the increasingly urbanized population to get out into the greenery and regenerate not only the body and mind but also optimize thought productivity



NATURE

RECOMMENDATIONS



FOR OUTDOOR EXPERIENCE PROVIDERS OF THE FUTURE

Here are our conclusions and recommendations for all outdoor experience providers that want to grow and develop - all year round:

1. DO SOMETHING TOGETHER

Reflect on what can help guests achieve their greatest wish - being together. Create appropriate activities and construct places that encourage socializing, thus reducing wasted hassle and waiting times. A safe bet is the fire, it always works as a gathering place for human encounters.

2. MAKE IT BEAUTIFUL!

See your facility through someone else's eyes, invite an aesthete, it is easy to become blind to your own creation. Where are the most beautiful places, where are the ugly ones? Hide rubbish bins and parking spaces. Start considering design and beauty in addition to function.

3. OPEN YOUR ARMS TO THE NERDS!

If you want to increase occupancy year-round, families with children are not enough. When life goes online, it is easy to reach

even very specialized interest groups. Find out what they like and become their friend.

4. DIVE INTO THE DIGITAL WORLD

Facilities that are not available digitally where the guests spend their time, will soon find a dwindling guest base. Consumers have less and less patience for searching. A common reservation platform is always better than one's own.

Recommendations from niche websites or one's own guests are a thousand times more valuable than self praise.

5. EXPLAIN YOUR CONTRIBUTION TO THE GDP

Can the outdoor experience increase Swedish national growth and GDP by people spending time outdoors increasing their thought productivity? All outdoor enthusiasts know how well you think in a kayak or how sorrows and worries disappear along the slope. Now, this field is becoming increasingly interesting for research. Nature's effect on our physical and mental well-being and therefore productivity needs to be communicated.

6. INVITE THE WORLD!

Inbound tourism is likely to account for the largest increase in the future. Furthermore, people born abroad make up the

domestic target group with the lowest interest in outdoor experiences up until now. You need to reach out!

7. CREATE SOMETHING OUT OF THE ORDINARY - AGAIN AND AGAIN

You cannot just sit back and assume that a winning formula will always remain a winning formula. The competition for people's time and money is getting tougher and you need to create something new all the time! It is not necessary to do everything from scratch, but a successful person is someone who is really good at cooking a hotchpotch of various components. Water skis in the snow? Or snowboard on the lake?

GOOD LUCK!



METHODS



THE QUALITATIVE SURVEY (SOCIAL MEDIA ANALYSIS)

The explosive growth of social media in recent years has made a large amount of user-generated information available on the Internet. In this study, we used specially developed algorithms to collect, organise and analyse social media with the help of artificial intelligence, semantics and statistical analysis. The method known as “netnography” – ethnographic studies on the Internet – has been used to filter large amounts of text in search of themes and topics of conversation. The result is an overview of the discussion landscape.

In this study we have used Swedish blog entries as a basis. We have combed through 50 million blog entries written over a 24-month period, with almost 120,000 entries about camping and 216,000 entries about skiing and lift facilities. Approximately 50,000 people have been involved in blogging about camping and approximately 90,000 people have been involved in blogging about skiing and lift facilities. We have applied multi-dimensional content analysis on all this material, to extract specific discussion themes related to each subject. We have then studied interesting themes that emerged from the analysis in depth by reading individual blogs in detail. Illustrative quotes have been used to highlight the different themes.

The figures and themes presented in this section of the report are representative of the blogosphere, but not necessarily of the

population at large. Although all age groups are represented in the blogosphere, people under the age of 35 are more active than other groups. One a side note, women blog more than men. This means that the various themes and insights that emerged as a result of the ethnographic analysis do not necessarily apply in the same proportion to the population at large.

Nonetheless, the source material's 336,000 entries and their 140,000 authors form such a large basis that the complaints, frustrations, observations and opinions that they express should be taken very seriously. Additionally, previous studies show that bloggers are often at the forefront in terms of preferences and have a tendency to influence others in their surroundings. Overall, netnography may be seen as a method to generate qualitative insights, to be compared with a giant focus group rather than a survey.

INTERNATIONAL TREND RESEARCH

In addition, in an international trend research project, we have explored the development in the field of outdoor experiences in different parts of the world, to find the trends and examples that are hot right now. In this regard, desk research has predominantly been used as a method. We have also used Kairos Future's Trend Database in which results from previous studies in related fields are stored.

THE QUANTITATIVE SURVEY

The quantitative survey consisted of an online questionnaire completed by a sample of 1,200 Swedes aged 18-78, representative of the general population with respect to sex, region and age. The collection period was February 2013. The sample respondents were supplied by the panel provider Cint.



ABOUT SCR, SLAO, KAIROS FUTURE AND TILLVÄXTAKADEMIN





SCR - National Swedish Campsite Association - a trade and marketing organisation for Sweden's campsite owners. Since 1967, we have been marketing Swedish campsites in Sweden and abroad. We also offer consultation and training to our members and work together to make Swedish camping an experience that is characterised by freedom of choice, diversity, natural abundance and ultimately, a freer life. SCR's mission is to market and develop SCR's members and inform and attract guests in order to make Sweden one of Europe's best campsite destinations. www.scr.se



SVENSKA
LIFTANLÄGGNINGARS
ORGANISATION

SLAO - Swedish Lift Area Organisation - has 250 members who are active in the skiing industry and operate ski facilities, ski equipment hire and professional ski schools. SLAO works to ensure that Sweden's ski facilities are not only safe and attractive but also offer continual competency training. SLAO works in cooperation with the trade organisations VISITA and SCR. During the winter season of 2011-2012, SLAO's members received approximately 2 million tourists and employed around 13,000 people. www.slao.se



tillväxtakademin

Tillväxtakademin creates growth strategies for companies, organisations and local business networks. Together with SLAO and SCR, Tillväxtakademin has mapped needs of different sectors for growth and development. This has led to shared goals across the industry, a 20-point programme for each sector and specific activities to carry the industry forward to the target year of 2020. The processes are ultimately about creating participation at all levels with everyone feeling a sense of inclusion and commitment. An important part of the sectors' future growth includes developing the seasons and improving business acumen. Looking ahead, Kairos Future's future report is a tool for strategic business planning at the facility level.

www.tillvaxtakademin.se



Kairos Future is an international consulting and analysis firm founded in 1993 that helps companies understand and shape their future. Through trend and market research, intelligence, innovation and strategy, we give our customers the big picture. Our head office is in Stockholm and we are represented all over the world. **For more information, see www.kairosfuture.com or contact us: info@kairosfuture.com**

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