



# Foresights of Island Tourism in Nauvo and Possibilities for Season-Extension

Niina Pasanen

2022 Laurea





Laurea University of Applied Sciences

# **Foresights of Island Tourism in Nauvo and Possibilities for Season-Extension**

Niina Pasanen  
Tourism & Hospitality Management  
Thesis  
September, 2022



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Year	2022	Number of pages	78
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The assignment for this thesis was given by the VISIT project to explore the future of island tourism in Nauvo. The purpose of the research is to be predictive, exploring the macro-environment of Nauvo and analysing the possible impacts on its tourism industry. The objective of the thesis is to gain insight of the future island tourism and to find development ideas for season-extension. The research problem aims to find answers to the questions of how the tourism in Nauvo looks like in the future and what kind of possibilities there are for season-extension. The results of the research are valuable for the project, its partners, and associates as well as for other destinations and tourism businesses in Finland.

The theoretical framework introduces the concepts of island tourism, destination management and sustainable tourism to explain the need for season-extension. Then the concepts of future and change are introduced to give understanding how the future needs can be anticipated. The research uses Strategic Foresight starting from Environmental Scanning, continuing to Semi-Structured interview, and ending up to scenario workshop.

The research problem aimed to find answers to the questions of how the tourism in Nauvo looks like in the future and what kind of possibilities there are for season-extension. The results described different changes - trends, megatrends, and wild cards - that are impacting the island tourism in Nauvo and analysed how they would appear in the future. The possibilities for season-extension were also described by giving development ideas that emerged during the scenario workshop.

COVID-19 has caused decrease in travelling, but Nauvo has enjoyed popularity amongst the domestic and nature tourists. For Nauvo becoming a sustainable tourism destination, some actions are suggested concerning measurements of environmental legislation, skilled workforce, cultural and natural heritage, customer experience, experiences, and new customer segments. Development ideas for season-extension concerned the development of year-round archipelago brand and experiences around seasons, marketing, seamless customer experience, new services, and packages around archipelagic life.

Keywords: Island tourism, destination management, sustainable tourism, strategic foresight

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## 1 Introduction

Island tourism is characterised by seasonality. Islands are often suffering from weak demand outside the summer seasons, therefore requiring development of new and existing services to better serve and attract customers during low season while giving a competitive edge. Tourism destination requires understanding of the future needs of the potential visitors to better meet their expectations to become more economically sustainable, which is why destination management and marketing are emphasising the topic.

The assignment for this thesis was given by the VISIT project to firstly gain information about the future of island tourism and secondly how the COVID-19 pandemics has influenced it. The study is concentrated in Nauvo, one of the associated partners of the project. The purpose of the research is to be predictive, exploring the macro-environment of Nauvo in the scope of tourism and analysing how the different factors might impact on the island's tourism industry. The research problem aims to find answers to the questions of how the tourism in Nauvo looks like in the future and what kind of possibilities there are for season-extension.

The objective of the thesis is to gain insight of the future island tourism and to find development ideas for its season-extension. The results are valuable for the project, its partners, and associates as well as for other destinations and tourism businesses in Finland. The research can help businesses to think about possible futures with different outcomes and prepare for them, giving a competitive advantage.

The theoretical framework of the study consists of two subjects: Destination Management and Economic Sustainability of Island Tourism and Understanding the Change to Anticipate the Future. The first part of the framework introduces the main concepts of island tourism, destination management and sustainable tourism to give understanding why the destination management is concerned about the unbalanced tourism demand in islands and interested in season-extension. The second part introduces the main concepts of future and change to illustrate the different types of changes influencing the future and how the anticipation can help in understanding the future needs.

The research is done by using Strategic Foresight. It starts from the Environmental Scanning where the changes in macro-environment are explored with the PESTEC analysis, from political, economic, social, technological, environmental, and consumer point of view. The findings are then used for forming a Semi-Structured interview to gain understanding of Nauvo's situation. The last phase of the process is scenario workshop, where three different future scenarios are being created with the help of Futures Table. The narratives for the scenarios are formed based on the chosen pathways and the possible interactions of the



selected drivers of change. Scenarios are then used strategically to get development ideas for season-extension.

After the introduction chapter, the second chapter gives the introduction to the client and working environment, The VISIT project and tourism in Nauvo. The next two chapters are the theoretical framework, third chapter being about island tourism with its destination management and economic sustainability, and the fourth about understanding the change to anticipate the future. The fifth chapter presents the used research methods and the sixth the results of the research. The conclusions can be found from the seventh chapter.

## 2 Introduction to client and operational environment

The assignment for this thesis was given by the VISIT project to gain information about the future of island tourism. The study is concentrated in Nauvo, one of the associated partners of the project. In this chapter, first the VISIT project is introduced and then the operational environment, the tourism industry in Nauvo, is presented.

### 2.1 VISIT Project

VISIT is an international Erasmus+ funded project operated between 2018-2021. The name “VISIT” is an acronym from “Versatile Islands Cooperating for New Services and Innovation in Tourism”. The project involves five Higher Education Institutes (HEI): Laurea University of Applied Sciences in Finland as a coordinator, Kiel University of Applied Sciences in Germany, Linnaeus University in Sweden, VERN’ University of Applied Sciences in Croatia, and Robert Gordon University in Scotland (replaced TEI of Epirus in Greece). These HEIs provide expertise in the fields of Service Innovation and Design, Business and Multimedia Marketing, ICT, Tourism and Hospitality Management, Entrepreneurship, Innovation and Technology in Tourism, and Sustainable Tourism and Business. (VISIT 2018, 1 & 4-6.)

The purpose of the project is to develop existing and new innovative services on the islands of Nauvo-Korppoo in Finland, Fehmarn in Germany, Öland in Sweden, Vis in Croatia, and Paxi-Corfu in Greece. The project is willing to boost local regions due to the “joint need to develop services on European islands with higher education” (VISIT Project Implementation Plan 2018, 5). The respective islands work as associated partners in the project. The target groups are small and medium-sized enterprises (SMEs) operating in Tourism and Hospitality sector on the islands. (VISIT 2018, 4-6 & 14-17.)

There is an insular need to develop tourism services and seasonality on the European islands. All the selected islands are suffering from low season, and from low innovation in developing services. VISIT indicate the need to update services to attract more customers while

potentially expand seasons. “VISIT aims to innovate, to make islands competitive in low seasons with new services” (VISIT 2018, 14). The long-term aim of the project is to strengthen the local economies, generate new jobs, stabilise income, increase sustainable tourism activities, network, and cooperate also in the future. (VISIT 2018, 14.)

The HEIs go for intensive study programs (ISPs) to the islands to work together with SMEs in authentic learning environments to create new services with the help of Service Innovation and Design methods, while developing their high-quality professional skills and enhancing e.g., their language, entrepreneurial, cultural, and transversal skills. Students provide variety of material during the ISPs and generate new internship possibilities to implement the designed services, which both bring in material for case study and integration guidelines. Project also develops VISIT training, learning and internship blended material as well as an online community, which is a platform for interactive cooperation, learning environment and self-study material, also for future cooperation. With the help of these activities, the project defines sustainability and transferability and publishes the results with stakeholders in the VISIT Handbook. (VISIT 2018, 14-17.)

## 2.2 Tourism in Finnish Archipelago and Nauvo

Situated on the coast of Baltic Sea, Finland’s shoreline is about 46 000 kilometres long and along it, there are almost 100 000 islands (Ympäristöhallinto 2021). Almost half of the islands, over 40 000, are situated in the southwestern coast of Finland, in the Archipelago Sea. Archipelago Sea is the largest archipelago in the world, formed by the latest ice age, and therefore is unique tourism destination with all its small authentic archipelago villages. (Visit Finland 2019, 2 & 25-26.) The popular tourist destination Nauvo is part of this archipelago. Nauvo is one of the five municipality districts belonging to the city of Parainen which is the world’s biggest archipelago town with its 15500 inhabitants, 5500 square kilometres area and 10 000 islands, islets and skerries. (Paraisten kaupunki 2019.) 3000 of these islands belong to Nauvo, including the two main islands - Iso-Nauvo and Pikku-Nauvo. Nauvo is a permanent home for 1500 people. Although in the summertime, the number increases considerably when people arrive to their second homes. (Visit Parainen 2020a.)

The centre of Nauvo is located on Iso-Nauvo where all the services and tourism facilities can be found (Nagu hamn 2022). Tourism is the most significant industry in Nauvo - together with farming (Visit Parainen 2020a) - and it is a major source of income during the summer months (Visit Parainen 2020b, 3). Most popular sight is the guest-harbour area which is sometimes referred as the St. Tropez of Finland with its busy marina and all the restaurants, boutiques, market and overall atmosphere (Visit Archipelago 2020, 16). In the city centre one can find the medieval Greystone Nauvo church with the unique Schwan organ (Visit Parainen 2020a) and the oldest existing Finnish-language Bible from the 1600s (Visit Archipelago 2020, 16.)

Iso-Nauvo provides adequate natural and cultural environment for different activities with its beaches, natural harbours (Paraisten kaupunki 2019) and forests on rocky terrain with relics from the past, such as enigmatic giant's garden (Visit Parainen 2022) and bronze-aged burial mound (Visit Parainen 2020c). In addition, from Iso-Nauvo it is possible to arrange trips to Seili island, famous for its dark history as an exile place for lepers and mental patients (Visit Parainen 2020a).

The main islands of Nauvo can be reached with a ferry from the mainland Parainen, which is 23 kilometres from Turku and 173 kilometres from Helsinki. It is a 33 kilometres journey from Parainen to Nauvo city centre, driving time being approximately 1 hour including a ten-minute ferry ride. The public transport between Turku and Nauvo runs in daily basis year-round, but there are seasonal differences in the timetables. (Visit Parainen, 2020d.) During the summer there is a boat connection operating between Turku and Nauvo (Visit Parainen 2019) and during the summer weekends there is a bus connection between Helsinki and Nauvo. It is also possible to cycle to Nauvo from Parainen. If travelling by water with an own boat, there are many harbours and marinas for visitors. (Visit Parainen 2020d).

There are many ferry connections to outer archipelago from Nauvo. It is also possible to continue all the way to Åland islands with the ferry combinations. The most popular routes for island hopping are the Archipelago Trail and The Small Archipelago Trail. Nauvo is in a central location on both routes. The Archipelago Trail is 250 kilometres long and it passes the islands of Parainen, Nauvo, Korppoo, Houtskari and Iniö. Along the trail there are eight to nine ferry connections, depending on the selected route, of which only one is chargeable. (Visit Parainen 2020e.) The Small Archipelago Trail is 120 kilometres long and passes Turku, Naantali, Rymättylä, Seili Island, Nauvo, Parainen and Kaarina. This trail uses three ferry connections. It is possible to do both trails with a motor vehicle or bicycle, but Seili island do not allow cars. (Visit Parainen 2020f.) The trails are open from late spring until early autumn. Archipelago is still accessible throughout the year, but one must turn around halfway on the Archipelago trail as some ferry connections do not operate. (Visit Parainen 2020e.)

### 3 Destination Management and Economic Sustainability of Island Tourism

Island tourism is popular but highly seasonal. Islands are often dependent on the tourism income and to remain competitive and economically sustainable they need careful management and marketing to meet the visitors' expectations while targeting to the prolongation of the tourism season.

This chapter gives the theoretical framework for destination management and economic sustainability of island tourism. It begins with the concepts of island tourism, destination

management and sustainable tourism. Then the economic sustainability of island tourism is discoursed and continuing to value-creation in destination marketing.

### 3.1 Island Tourism

Tourism occurs when leaving one's home by using a transportation for visiting a destination, and tourists are they who travel from their home to the destination and consume tourism products along their journey. Tourism is often defined as journeys that involves at least one-night stay in a destination. (Wang 2011, Para 1.) Uysal, Harrill and Eunju (2011, Para 7) states that "tourism takes place in destinations and individuals travel to destinations to visit attractions, to participate in leisure activities and to form vacation experiences resulting from their interactions in the places they visit".

Uysal et al. (2011, Para 7) states that the tourism system (adapting the models of Leiper 1979; Mill & Morrison 1985; Gunn 1988) always consists of an origin representing the demand side and a destination representing the supply side of tourism. The demand is referring to the source of visitors while supply to tourism activities in the destination. The total tourism experience is formed via the interaction of the demand and supply. (Uysal et al. 2011, Para 7.) Wang (2011, Para 1) categorise the tourism system (by referring to the model of Leiper 1995) to three elements: geographical elements, tourists, and tourism industry. The geographical elements include the traveller-generating region, transit route region and the tourist destination region. The traveller-generating region is the place where a tourist lives, and transit route region is the place which tourist passes by when travelling to a destination. (Wang 2011, Para 1.) The destination region is a separate geographical entity from the tourist-generating market that adapts to suit to different contexts and can be either one certain location or several formed by travel patterns or routes. (Wang 2011, Para 1 referring to Dredge 1999.) Tourists can be categorised into different types according to their motivation and activities they are engaged in, such as leisure travelling, business travelling and common interest travelling. Tourism industry involves all the businesses and organisations that are helping to promote the tourism products provided by different kind of companies to serve customers with different budgets and tastes. (Wang 2011, Para 1.)

Destinations consists of the supply provided for tourists, including physical equipment, management, and service. The tourist destination is the pull factor - the reason for travel. It is a place with different attractions where most of the tourism activity happens and memorable tourism experiences can be achieved. It is a territory where tourism planning and management strategies can be performed. (Wang 2011, Para 1.) Destinations can be seen "in multiple layers of geographical entities" ranging from small-scaled operational tourism products to large-scaled geographical entities of countries (Tasci 2011, Para 8). Destination can be defined from the point of view of a visitor, tourism industry and government agencies.

Destination for visitors forms from the attractions and services provided as well as from the entry and exit points and time spent at the destination. Tourism industry on the other hand see all the clusters and linkages between operators and businesses e.g., supply chains, marketing, economies, and policies. But the government agencies have a clear understanding of the destination forming from the geopolitical administrative boundaries. (Jenkins et al. 2011, Para 2.)

Destinations are places visited by tourists, but they are not tourism destinations for locals and therefore there must be tourist-oriented developments. Destination should transform its resources into attractions, provide different kinds of accommodation and transportation for tourists, and integrate all the tourism development into other development patterns of the place. Attractions can be developed from the tangible and intangible physical and cultural resources of the place. The tangible attractions are the built environment constituting of heritage features, streets, tourist- and leisure-oriented buildings and other buildings and housing ordinary for the place as well as the cultural, sport and entertainment facilities. The spirit of place of a destination constitutes of the concrete attractions and intangible characteristics. The intangible elements make the place more distinctive, attract tourists and enhance the visitor experience. The intangible elements are festivals, traditions, arts, and crafts as well as other attributes of the place, e.g., friendliness or safety. Tourism is a resource-dependent industry using natural and cultural heritage of the destination and using human and physical environment as selling points (Howie 2003, 10, 73-83 & 97). There are different kind of tourism products and elements needed by tourists. Tourism-oriented products include accommodation, restaurants, transportation and all the companies selling the holidays and activities. Resident-oriented products tourists might use are for example hospitals and barbershops. The background tourism elements, such as natural and sociocultural attractions, are important supply resources usually being the main reason for destination-selection. (Uysal et al. 2011, Para 7.)

Islands have been popular tourism destinations through the time, providing a perfect place for holiday to escape the daily lives of the visitors offering “authentic cultural and natural experiences in unique settings far from the urbanized and banal locales” (Carlsen & Butler 2011, Chapter 1). Islands have been identified as places of desire or paradise and some people attach them even to religious pilgrimage (ESPON 2013, 48.) The marine and terrestrial environment and specific island culture are the main reasons why the island destinations draw tourists (Carlsen & Butler 2011, 231).

Baldacchino (2015, 1-4 referring to Butler) presents four key factors that are specific to island tourism destination: physical separation, cultural difference, attractive climate and environment and political autonomy. The physical separation refers to the journey needed to take to get to or from the island. Cultural difference refers to that islanders often have a

different identity compared to the mainlanders. Island's special geographical and geological characteristics give a unique flavour both in cultural and literal means. The islanders may have different kind of a language or specific manners, and they offer island specialities in the means of local food and beverages. The attractive climate and environment have a literal meaning and it includes the huge biological diversity of the flora and fauna. Finally, the political autonomy refers to the fact that islands usually have politically own rights to advertise themselves as tourism destinations. (Baldacchino 2015, 1-4.)

Many islands are actually part of group of islands - archipelagos. Islands in the archipelagos are seen to belong together while acting as individual units of the group. Then, the islands are not only separated from their mainland but also from each other, underlining the interaction among the islands. Often there is one main island within the archipelago, but there can be several of them having the power of another island within the archipelago, which in turn generates multiple identities for the islands. (Baldacchino 2015, 1-11.)

### 3.2 Destination Management

Tourism development in destinations is happened either spontaneously or by actively encouraging and it is influenced by the current socio-cultural, environmental, economic, and political situation within the places. There are other industries along with the tourism within destinations which direct the development pattern of the area and tourism should be integrated into it. (Howie 2003, 55.) A place can have many uses and tourism is just one of them. Destination management reconciles tourism with other industries and services, and it is involved in planning and regulation. (Howie 2003, 145.) To create a successful management strategy for a destination, it is important to understand the extent of tourism and concepts of destination management and marketing (Wang 2011, Para 1).

According to UNWTO (2020) destination management is “coordinated management of all elements that make up a tourism destination”. Destination management connects all the separate elements that the destination consists of and manage the complexity with a strategic approach (UNWTO 2020). Planning, developing, and managing of a tourism destination is complicated as there are several stakeholders, many topical issues, and different schedules to be brought together. (Howie 2003, 55.)

Destination management organisation (DMO) is an organisational entity that consists of variety of authorities, stakeholders and professionals forming a tourism sector partnership. The governance structure and functions of DMOs are not consistent globe over and some destinations do not have DMOs at all. (UNWTO 2019.) Organisations within DMOs have the same goal to achieve competitive and sustainable destination. DMO has a leading role in achieving the goal by strategic coordination. Strategic leader is important for a destination to succeed and therefore DMOs are growing popularity around the world. (UNWTO 2020.) Many

destinations have a destination manager who controls this process by influencing and persuading the decisions and directions, but not having the full authority (Howie 2003, 55).

There are different levels of DMOs from national tourism authorities or organisations to local DMOs in smaller geographical areas. There are many companies and organisations which may be involved in destination marketing and management depending on the local economy. (Wang 2011, Para 1) Destination planning and policy in destination regions are not simple tasks as they usually involve several government agencies. They all have their own structure in their policy, planning and management and have their own knowledge and understanding of the destination, which makes it difficult to adjust the politics of planning and policy making and dictate their area of responsibilities. (Jenkins, Dredge & Taplin 2011, Para 2.)

Besides the traditional marketing and promotion activities, DMOs are broadening their operations towards a leading figure in destination development and strategic planning (UNWTO 2020). According to UNWTO (2019) DMO's role is initiating, coordinating, and managing certain activities such as product development, marketing and convention bureau activities as well as implementation of tourism policies (UNWTO 2019) which are intended to tourism industry helping with choices and development direction benefiting the destination (Howie 2003, 189). The holistic view to understand destination marketing and management should include certain themes with several issues to identified, interpreted and coordinated: understanding of destination marketing and management; principles and functions of place image, positioning and communication; strategies and tactics in destination product development and distribution; strategies and approaches for managing stakeholders; principles and strategies for managing competitiveness and sustainability as well for safety and crisis management. (Wang 2011, Para 1)

Destination Management/Marketing Offices need to know their roles and functions within the local tourism industry to better serve the interests of the destination. Their most important job is to promote the destination for visitors, but their role is much wider than that. DMOs help creating business networks and act as organisers and facilitators for tourism marketing and development. With the help of DMOs, destinations enable to gain holistic image and competitiveness in the marketplace easier than if tourism businesses would individually promote their products and services. So, DMOs are often representatives of all components forming the tourism destination. These components are very competitive but still they need to work together with DMO so that they form an integrated marketing strategy which help the whole destination. (Wang 2011, Para 1)

Wang (2011 referring to Wang 2008) categorise the role of local DMO in destination marketing into nine different themes: Information provider, Community brand builder, Convener and facilitator, Catalyst, Advocate, Organiser, Funding agent, Partner and team builder, and

Network management organisation. DMO makes the research to fulfil visitors' expectations and shares the information through different channels. It is responsible for marketing the entire destination and acts as the marketing representative of the local businesses as it has wider network for marketing activities and can bring different kind of customers to the area. DMO has a convening role in public discussion and problem solving of community issues and it has a liaison role between the visitor and community and between the local tourism businesses and government. It emphasises the importance of tourism and its benefits for the local economy and people as well as acts as an advocate for the focus groups of the collaboration activities. DMO sorts out the feasible marketing activities for the destination for implementation and supports the participation of the local community. It provides funds for collaborative marketing activities, particularly at a larger scale. DMO ensures that all the partners are willing to work together, have a trusting relationship and share all the ups and downs in their collaborative marketing efforts. And finally, DMO is community's agent and principal of its network offering the guidance and coordination of marketing activities as well as managing the stakeholders in the community. (Wang 2011, Para 1.)

### 3.3 Sustainable Tourism

The earth's ecological carrying capacity is limited. There is a limit for how much the earth can bear and the natural environment can handle (Sitra 2022). Environmental carrying capacity is exceeded when the nature starts to react, for example by biodiversity loss and degradation (Marski 2021). The increasing consumption of natural resources has become a threat for natural environment and human beings (WTTC 2019). In some places, the environmental carrying capacity is already exceeded (Høyer 2004, 287), which is why there has been a need for thinking about the sustainability issues.

The UN's Brundtland Commission report and global conferences in Rio de Janeiro 1992 and Johannesburg 2002 were the initiators of the sustainability concept. (Høyer 2004, 287.) The first - and still valid - definition of sustainable development was given in this Brundtland report by World Commission on Environment and Development (1987, part 2): "development that meets the needs of the present without compromising the ability of future generations to meet their own needs". It is about "creating better life for all people" (UNEP & WTO 2005, 8) so that the profits of natural resources are used only on that level that it does not impair future generation's chance to benefit from them. Therefore, the concept of sustainable development can be seen as a global approach for natural resources management. (Navarrete & Gonzáles-Arenas 2004, 262.)

The main topics risen from the above-mentioned UN's outcomes are climate change and biological diversity, which are seen as a global concern that needs mutual agreements. Main



factors the sustainable development concept applies are ecological sustainability, globality and fair distribution over time and in space. (Høyer 2004, 287.) The concept has three main sustainability pillars: economic, social, and environmental. Economic sustainability refers to society's prosperity and viability of companies and economic activities. Social sustainability refers to the respect of human rights and equality as well as strengthened local communities and cultures. And environmental sustainability refers to conservation and management of resources and protecting biodiversity and natural heritage. (UNEP & WTO 2005, 9.)

Concept of sustainable development encompasses every sector of economy, including tourism (Meyer-Chech 2004, 119). As sustainable development is a concept that focuses on finding solutions to environmental problems for collective good, sustainable tourism is developed to follow this principle (Høyer 2004, 286). While sustainable tourism can be described as a "form of tourism that strives to realise the principles of sustainable development" (Meyer-Chech 2004, 119), UNEP and WTO (2005, 2) emphasise that sustainable tourism is not a separate tourism type, instead all tourism activity should aim to more sustainable outcome. Therefore, sustainable tourism has the aim of including every aspect of tourism in the sustainable development agenda. The agenda's environmental, cultural, economic, and social goals are the foundation for principles and guidelines of sustainable tourism. (MacLellan & Strang 2004, 250.)

Sustainable tourism is a form of tourism that is developed and practiced in a way that it stays viable and do not harm or alter the operating environment to that extent that it prohibits the other activities and processes (Zahedi 2004, 154 referring Butler). To achieve sustainable tourism, the disadvantages of the industry need to be minimised and the benefits need to be fostered (UNEP & WTO 2005, 2). Sustainable tourism is balancing between the economic benefits of the industry and the negative social and ecological impacts of travel. (CBI 2019).

UNEP & WTO (2005, 18-19) present the twelve aims for sustainable tourism: economic viability, local prosperity, employment quality, social equity, visitor fulfilment, local control, community wellbeing, cultural richness, physical integrity, biological diversity, resource efficiency, and environmental purity. Tourism destinations and businesses need to be competitive to remain viable and benefit long-term. The contribution of tourism industry in local economy should be maximised and the local jobs provided by tourism should be improved and emphasised as well as the socio-economic benefits should be fairly distributed locally. Tourism destination should be safe and satisfying contributing to the fulfilment of the visitor-experience as well as the locals should participate in its development. The wellbeing of local communities should be maintained and strengthened as well as their history and cultural heritage appreciated. The quality of landscapes should be maintained and enhanced while avoiding altering the environment and the natural areas with their biodiversity conserved and protected. The tourism development and its operations should be resource

efficient as well as the pollution and waste generation of the tourism industry minimised. (UNEP & WTO 2005, 18-19)

### 3.4 Economic Sustainability of Island Tourism

As the concept of sustainable development applies fair distribution over time and space (Høyer 2004, 287), it can be seen to mean also that the economic benefits should be fairly distributed over the year. As economic sustainability is about society's prosperity as well as viability of companies and economic activities (UNEP & WTO 2005, 9), the island tourism should also be operated year-round to ensure the viability. As one aim for sustainable tourism is to highlight the importance of tourism industry in local economy and strengthen the competitiveness of destinations (UNEP & WTO 2005, 18-19), it is necessary to understand the overall tourism industry in coastal and maritime destinations as well as the economic challenges the operating environment provides.

Tourism destinations and businesses need to be competitive to remain viable and benefit long-term. The contribution of tourism industry in local economy should be maximised and the local jobs provided by tourism should be improved and emphasised as well as the socio-economic benefits should be fairly distributed locally. UNEP & WTO (2005, 18-19)

Coastal and maritime tourism is a wide industry with variety of building blocks. Coastal tourism includes beach-based and land-based tourism in the coastal area. Beach-based tourism covers all the recreation activities on the beach area, while non-beach related land-based activities in the coastal area covers all the other tourism and recreation activities which benefit from the proximity of the sea. Maritime tourism is more water-based but it uses land-based elements such as infrastructure and services. (ECORYS 2013, 5 & 19.)

There are four types of maritime and coastal tourism which are categorised by the tourism demand and supply, and value gained. Tourism demand is expressed by the volume of tourists per year with an overnight stay in destination's accommodation establishment. Supply means all the services offered in the destination and their employees. The amount of value is expressed by the total spending per year, but also social and environmental values are considered. These four demand patterns are called low-profile tourism, niche tourism, mass tourism, and high-profile tourism. (ECORYS 2013, 13-14.)

In the low-profile tourism the volumes of demand and value are low; it attracts small numbers of visitors, and their spending is low. Low-profile tourism contains early forms of nature and eco-tourism such as camping, small-scale boating, and recreational fishing. The business model is more popular in Northern and Eastern Europe. Both demand and supply are limited; the destination does not attract visitors enough or they are not even aware of it. (ECORYS 2013, 14-17.)

The niche tourism on the other hand attracts low volume of visitors but is high in value. Its business model is based on differentiation focusing on specific added-value locations or services, such as wellness, wildlife, and gastronomy. Niche tourism might not occur only in one specific coastal destination, but it may be spread across the whole region due to its need for specific natural and cultural resources as well as unique services and experiences. The visitors of niche tourism services value more quality and are willing to pay for it. The segment has relatively high revenue stream and it is valuable also for the local communities and the environment. (ECORYS 2013, 14-16.)

The business model that is high in volume but low in value is called mass tourism. The business model attracts high number of visitors, but their average spending is low, which means that the long-term impacts might be even negative for the local communities. (ECORYS 2013, 14-15.) Mass tourism, developed along with the improved transport technology and increased leisure time, is a tourism type in which a great number of tourists travel to a same place at a same time. Especially in marine destinations, tourist flows have increased dramatically to the recent years requiring careful management and conservation of the marine resources. (Altobelli & Kirstges 2008, 306-307.)

The preferable business model for high volume of visitors would be high-profile tourism, which is also high in value. It offers high level of quality and unique value, which attracts large number of visitors across the tourist segments throughout different seasons and also through the years. The high-profile tourism maximises profits of high volume of visitors and challenges with the aim of minimising its negative impacts to the environment and quality of services and experiences provided. The services and experiences need to be unique enough to retain tourists and obtaining high spending, as well as local capabilities and resources need to be in good condition to maximise the profits and remain sustainable. High-profile tourism has high growth potential in European coastal regions which have rich cultural and natural environment, and it has proved to be successful across the Baltic Sea. (ECORYS 2013, 14-15.)

The maritime and coastal tourism sector is highly seasonal. Tourists tend to visit the destinations during the summer months which means that destinations are dependent on these arrivals since much of the socio-economic benefits are gained then and many facilities are closed outside the season. Maritime coastal tourism sector is highly vulnerable segment compared to other types of tourism destinations because local demand is unreliable and non-resident visits to coastal regions are unpredictable. All these aspects make the segment exposed to sustainability challenges which need to be managed. (ECORYS 2013, 32-37.)

Tourism is one of the most important sources for economy in the island destinations and some of them may not survive without it (Carlsen & Butler 2011, Chapters 1 & 17). The main experiences on islands through time are the three "S"'s: sun, sand and sea (and sometimes

the fourth “S” sex), and especially in winter people from Europe are looking for these characters. Islands have more small scaling traditional activities compared to major companies in mainland but diversified and of high-quality. (ESPON 2013, 12.)

Islands are characterised by small size, remoteness, and isolation as well as by relatively negative aspect of insularity. Their resources are limited, as well as their population and activities. The accessibility may be difficult, and the transportation costs are higher. Islands cannot compete with the mainland over the same markets as their location implies extra costs and they have different characteristics that attracts. Their infrastructure and services are limited as islands are expensive for public sector to provide them, and therefore there are not much for the enterprises and the population. Since most of the jobs are in the urban areas, islands have lower career opportunities and there are not enough educated people to make new innovations to keep the economy competitive. (ESPON 2013, 9-10.) The islands in archipelago’s may have their own economic challenges as the archipelago’s power structure might be imbalanced creating dependency on the main island - and possibly on the other islands - and inequality in resources, investments, revenue and employment. (Baldacchino 2015, 1-11.) Many islands also face the issues of the small internal markets, confrontation between tourists and residents, and the vulnerable position towards external changes (Carlsen & Butler 2011, Chapter 17).

### 3.5 Destination Marketing in Value Creation

Tourists need to know what the destination has to offer and believe that it is worth visiting. Therefore, marketing is an essential element for a destination. Marketing is concentrated in tourism product, customers, and market planning. It examines the desires of the potential visitors and adjust the supply according to it. (Howie 2003, 141 &146.) Howie (2003, 142) describes marketing as “exchange process between customers buying or using products and producers supplying and selling the products and services”.

Generally, service products are intangibles that cannot be tested before buying. Holidays are one of the most expensive services that people purchase in advance and they need to rely on trust that they will get what they have been convinced. (Howie 2003, 147.) Therefore, people need to count on the image given. Images of destinations are in the “mind’s eye” (Howie 2003, 101-102), and they are created based on conversations, media or promotions people come across. It is crucial for destination management to maintain and enhance the elements of the destinations to meet the expectations and give the wanted image. Visitor experience depends on this encounter. In destination management, the value is created by fulfilling tourists’ experiential and aesthetic needs. (Howie 2003, 101-102 & 153.)

“Tourism is affected by the political and cultural climate, the ecological environment, managerial practices and the destinations’ ability and consistency in planning” (Uysal et al.

2011, Para 7) and, thus, it is essential to understand the destination environment in which the tourism is operated. For managing a destination, it is crucial to understand the dynamics of the marketplace and integrate the destination's supply to the needs and expectations of a consumer. Therefore, destination marketing research is something that DMO needs to do to understand the market and create strategies for supporting the sustainability of tourism business. There are two main goals of destination marketing research: to increase demand while maintaining competitive and to foster destination management. If the research is not made, wrong decisions might be done which could affect the attractiveness of the destination and future tourism to the area. (Uysal et al. 2011, Para 7.)

One of the main issues in destination management is to match the destination's resources for creating experiences to visitors' needs. Tourists' have many different travel options from which to choose and even though destination had many kinds of activities to offer, they might not fulfil the tourist's expectations and motivational needs. Expectations are the beliefs that tourists have about the characteristics of a destination and can have a role in determining whether the destination would meet ones needs. So, it is important to study the tourist behaviour and their travel motivation. If the research is not done and destination marketer just assumes visitors' motives, the promotion and selling of the product might not fulfil the real needs or the marketing efforts are too narrow to reach other visitors' motives. (Pearce 2011, Para 3.)

According to Pearce (2011, Para 3 referring to Dann 1997 & Crompton 1979) there are two different factors that need to be separated from each other to understand the travel motivation: push factor and pull factor. Push factor is "a patterned summary of the social, cultural and biological forces driving travel behaviour" (Pearce 2011, Para 3) while the pull factor refers to the characteristics of a destination attracting people. Destination managers should better focus on the true motivation which guide the individual to the destination selection. Pearce (2011, Para 3 referring to Mannell and Iso-Ahola 1987) explains two push forces that affect the travel motivation: the desire to leave the daily life and the desire to attend the recreational activities and reward oneself. The motivation can for example be to spend time with family as tourism is relationship-dependent and close relationships can have a great influence in it. One thing that needs to be considered in motivational studies, is the cost of the holiday which might be either positive or limiting pull factor. (Pearce 2011, Para 3.)

The tourist behaviour can be driven by the values that are connected to social and cultural motives of a tourist. Values are like attitudes towards specific topic and can shape visitor's on-site behaviour. The on-site behaviour can also be studied. On-site behaviour means how visitors behave in a destination; how they use facilities and experiences within the attractions offered. So, the travel motivation can be studied from the destination selection or on-site

behaviour point of view, but it is also important to look forward and add insights of the changes in tourism and in the society. Most of the studies are made by commercial consultants or government statisticians who can conduct large-scale surveys about visitors' travel experience. (Pearce 2011, Para 3.)

A destination needs a marketing plan based on the results from the market studies. First, it is important to plan the right marketing mix offered to the potential consumers and then build up the plan around it. (Howie 2003, 150.) Howie (2003, 150 referring to Kotler) describes marketing mix constituting from 4 Ps: product, price, promotion, and place. In the context of destination management, the "product" refers to the destination itself with all its tangibles and intangibles. The "price" refers to the price of a product but when the product is a destination it is quite unclear and therefore better definition could be the value one receives for his/her money. The "promotion" refers to the way a destination will be promoted to the potential visitors. It is very important for a destination because the product cannot be tried out before purchasing. Promotion should be done with authentic features so that the image that tourists create in their heads would meet the expectations. And finally, the "place" refers to the place where the promotion is done and where the product has been bought. (Howie 2003, 150.) Three further Ps can be applied to the marketing mix of service products that are: people, physical evidence, and process. The "people" refers to the employees that tourists encounter during their customer journey, the "physical evidence" to the service environment, and the "process" to the organisational policies and procedures that tourists deal with. (Howie 2003, 150 referring to Booms & Bitner 1981.)

In the marketing context, branding is an important action. Branding creates a product an identity from its tangible and intangible elements to distinguish it from other products on the markets. The identity is created by choosing a brand name, designing a brand mark, and registering a trademark. For a consumer, the branding will help identifying the product, indicates the quality and represents a psychological reward associating the purchaser with a specific lifestyle. Organisations benefit from branding by adding value to the product, growing loyalty towards it, and positioning it in the marketplace. (Howie 2003, 152.)

#### 4 Understanding the Change to Anticipate the Future

To understand the changing world and society and to anticipate the consumer's future needs, it is necessary to understand the change. Better decisions can be made by exploring and imagining different futures to achieve the wanted direction. There are different types of external changes that are affecting the future and people's motivations.

The theoretical framework for understanding the change to anticipate the future begins with the chapter 4.1 explaining how the future can be anticipated and presenting the concepts of future and change. The next chapters are about the different types of changes. Chapter 4.2 presents the trends that are shaping the consumer behaviour, 4.3 the megatrends that are driving the global change, 4.4 weak signals that are heralding the emerging change, and 4.5 wild cards that are suddenly changing everything.

#### 4.1 Anticipating the Future

To think about the future there is a need to conceptually think the passing of time. The present is continuously passing by and move into history where it blends in the database. The database is a large complex ensemble from where one can search and combine events to identify patterns to foresee future events and act upon them in the present. The past events may have had similar signals and expressions as well as consequences than the event that is coming, although they are never identical. The past events are models which can give us insight to the future events. (Hajkowicz 2015, 11-12 & 20-25.)

Hajkowicz (2015, 13) compare the future's thinking to preparedness. When facing the future, humility and at least mental preparedness for any given situation are needed. Although people might be small in front of the future, they can still affect to it and its course. (Hiltunen 2013, 175.) Leaders need to think the bigger picture and conceptualize things that are still unclear and their consequences uncharted to survive in the unexpected situations. The wise choices begin with imagination and by exploring, describing, and imaging it is possible to create a pathway to better decision-making. (Hajkowicz 2015, 13.)

According to Hajkowicz (2015, 14-17) future can be seen and described in several different ways. One way of describing them is to use concept of four Ps. The four Ps are represented in conical form to describe the degree of certainty starting from a pinpoint of present moving into the wider perspective of uncertain future. The four Ps come from the word's probable, plausible, possible, and preferable. The "probable" refers to the events that have occurred in the past and are expected to occur also in the future. These events have an available dataset, such as statistical models, from which to predict the future. Some examples of the probable events are the weather forecasts and population projection. The "plausible" refers to the events that are evidence-based but cannot predict using statistical calculation. It is possible to conclude the plausible future event with logical thinking and it is a base for many strategic directions nowadays. The "possible" refers to all the possible events that could happen in the future regardless of their probability. The last P, the "preferable" refers to the desired direction of change. It is a pathway that we can try to take but is not always achievable and it comes along with a need to make and implement a strategy to act upon. In

the strategic foresight, it is preferable to identify all the four Ps before attempting to achieve the preferable future. (Hajkowicz 2015, 14-17.)

Examination of change is necessary to anticipate the future and thus, to think about the possible consequences of one's actions in the future. It is not always easy to see the change even though the signs could be clear as humanity makes people blind; one's attention might be selective, one might interpretate wrongly or one might underestimate or even deny it. Though, the change can be observed from different angles. The nature of the change can be slow or fast, or it can be cyclic which can be seen through history. The lifespan of the change varies; some changes begin slowly eventually having a global effect until gradually fading and some major changes happen quickly. Changes can vanish rapidly, or they can be vanished before they were even born. There are different types of changes; weak signals that can be detected when the change is emerging and only a few know about it; trends that can be detected when the change is more widely adopted; megatrends that are phenomena consisting of variety of trends and affecting the everyday lives of people; and wild cards that are fast major changes. (Hiltunen 2013, 3-9, 25-41, 175.)

The change to be happened, the critical mass is required. After this, the change start to spread rapidly. The progress of change can be described by the Tipping Point theory of Malcolm Gladwell as an epidemic that requires the select few to start the implementation, the element that can be caught from others, and the right environment for the change to spread. The improved technology enables information in modern times to spread fast around the world as well as it results in increasing number of changes and fragmentation of them. (Hiltunen 2013, 7, 16.)

#### 4.2 Trends Shaping the Consumer Behaviour

Hiltunen (2013, 53) defines a trend as an indication of the “direction of change in the recent past or present, which may also continue in the future”. Trends might give us a hint of different future movements but there are no guarantees of their continuity in the same direction. They are reflection of long-term social trends rather than short-term fashion phenomena and are related to all areas of life. (Hiltunen 2013, 52-54.) If the same style appears in different kinds of products, it is a hint for an emerging trend. (Vejlgaard 2008, 17.)

Raymond (2010, 14) defines a trend as the “direction in which something tends to move, and which has a consequential impact on the culture, society or business sector through which it moves”. He states that a trend can be emotional, intellectual, spiritual, desire, mood, or idea as well as it can be a set of similar shapes or interrelated objects. According to him, trends are integral part of people's emotional, physical, and psychological world, and by examining them it is possible to understand the underlying ideas and principles that drive and motivate



people. Trends are regarded as patterns that can invite people to embrace new ways of doing things or express themselves. (Raymond 2010, 13-15 & 34.)

Vejlgaard (2008, 2) defines a trend as a unique process of change which have an impact for most of the people. Vejlgaard (2008, 7) states that the trend sociologists' does not see a trend as "something that has happened" but "something that is going to happen in a certain way". The key in this statement is that the trend is a new thing that most people will adopt. A trend can occur in style or taste but also in behaviour around them. To understand trends, it is necessary to understand human behaviour. Human behaviour is usually the reason for change and thus, the humans are responsible for the changes in style and taste. A trend relates to human senses - it can be something that we see or read, such as design, or something that we taste or smell, such as food, or something that we hear, such as music, or something that we feel, such as dance or travel. (Vejlgaard 2008, 7-9, 26 & 160-161.)

Raymond (2010, 14) explains the word 'trend' coming from Middle English and High German with the meaning of turning, spinning or revolving. First in the 20th Century, the term was used mainly in statistical sciences but since 1960s it was also used for describing changes inside our culture. Thus, according to Raymond (2010, 14), a trend can be seen as an 'anomaly' which means "an oddity, inconsistency or deviation from the norm, which becomes increasingly prominent over a period of time as more people, products and ideas become part of change". So, "trend is the 'direction' in which something new of different moves" (Raymond 2010, 14).

According to Raymond (2010, 15) trends are compulsive and addictive and they infect people in surprising moments regardless of people's willingness. He compares a trend to a meme that is "a compelling or infectious idea that runs through the culture like a virus, cutting through all opposition". A meme can be explained by the fact that there are forces and pressures from the surrounding world that make people to go with the flow - to want something that others have because there is a social, cultural, or psychological value attached to it. (Raymond 2010, 15-17.)

People can be divided into two groups based on their desire to be like the others and on their openness to changes - homophilous and heterophilous people. Homophily refers to group of people with similarities which tie them together. Homophilous people feel comfort and security in 'sameness'; they think, look, act, and engage with other people in similar ways. This type of people is not so open to change and therefore are more resistant to the influence of a new trend, although they are not immune after all. But when a trend finally reaches them, the strength of it might be weakened. Heterophily on the other hand, refers to group of people that are more open to change and who have larger and more diverse networks.

They embrace new ideas and mindsets more easily and frequently as well as disseminate them across their networks in a certain period of newness. (Raymond 2010, 28-29.)

A trend spread similarly through certain groups of people (Raymond 2010, 31) and certain patterns happens repeatedly when a new trend is about to be born. The patterns are quite predictable and by understanding the process, it is possible to anticipate future needs of people. In the Diamond-Shaped Trend Model, developed by Vejlgard in the 90s, the patterns behind trends are explored in a systematic way. The model simplifies the complex social process of a trend among six trend groups of different personality profiles: trendsetters (5%), trend followers (10%), early mainstreamers (20%), mainstreamers (40%), late mainstreamers (15%) and conservatives (10%). The six personality profiles have differences in their willingness to change and openness to new styles from trendsetters as most open to changes to conservatives as least open. The spreading of a trend begins from trendsetters at the top of the model to the mainstream at the middle and then moving down to conservatives at the bottom. First trendsetters adopt something new and after observation, the trend followers also adopt it. When there are enough people to observe, early mainstreamers feel comfortable to adopt the style and by having more people to observe, the mainstreamers end up adopting the style too. When the trend process from mainstreamers to conservatives begins, the trend will not grow anymore and interest towards it is starting to fade. (Vejlgard 2008, 1-2 & 63-80, 144)

To detect trends, trend forecasters search patterns or shifts in people's attitudes, mindsets or lifestyles that are changing from the current way of people's behaviour, living, dressing, communication, or trading. To find these patterns and shifts, trend forecasters need many kinds of skills and use variety of techniques and processes. Trend forecasting requires ability to be sensitive to things with an open mind without preconceptions and prejudices. Trend forecasting emphasises every aspect of the society to understand both short-term and long-term impacts of emerging changes. Trend forecasters observe emerging patterns or anomalies in the culture that can give a hint about larger cultural shifts. There are many possibilities where the change may happen, such as in architecture or science but also in a new philosophy or political movement. (Raymond 2010, 12-14 & 31-34.)

Trend forecasters search for "stuff" from the surrounding world by "brailing the culture" to understand whether there is an indication of a rising trend. (Raymond 2010, 65.) In Cultural brailing - invented by Faith Popcorn - one uses all the senses and hyper-observantly embraces everything in every time and place to dig the stuff across cultures and key industries in a strategic, analytic, and measurable way. To identify the trends and understand how they could be used, one should pose the fundamental questions of who, what, where, why, and when. (Raymond 2010, 36-44 & 65.)

### 4.3 Megatrends Driving the Global Change

Megatrend is a huge recognisable wave of development consisting of macro-level phenomena with different smaller phenomena and trends (Heinonen, Kuusi, Kurki, Parkkinen, Ruotsalainen, Salminen & Viherä 2017, 307). Hiltunen (2013, 43) states that “megatrends describe the current moment” by being heavily present and affecting multitude areas of life with a wide geographic orientation. Megatrends are long-lasting (Hiltunen 2013, 43); They are gradual trajectories of change occurring over the coming decades (Hajkowicz 2015, 14) with a clear history and direction (Heinonen et al. 2017, 307). Since megatrends are usually anchored in history, it is possible to assume that they are more likely to continue in the future. (Hiltunen 2013, 53.)

Megatrends are profound social, economic, environmental, and technological drivers of global change that cannot be directly controlled but can try to be influenced upon once learned to read them. (Hajkowicz 2015, 3 & 14.) Though, it is important to notice that megatrends are slow long-term phenomena, and they cannot transform in an instant (Sitra 2020.). Also, megatrends are not fully stabilities. They can tell something about the future but cannot be relied on completely, because one surprising event - a wild card - can change the course radically. (Hiltunen 2013, 43 & 53.)

Hajkowicz (2015, 180-181) states that the megatrends are “taking the world towards countless moments of freefall from which soft and hard landings are possible”. Freefall is an increased momentum of gradual build-up change that expresses itself with explosive force. It starts with slowly moving driving forces that give fragmented information signals almost impossible to hear from the noise, but increasingly strengthening and becoming clearer. In the moment of freefall, the foundations of existence are vanished, and the old methods do not apply anymore requiring new models to think and act. During a moment of freefall our actions depend on our ability to identify the signals and act upon them. Moments of freefall are not invisible nor unexpected, but unfortunately the information signal is often ignored until it becomes obvious, and the damage has already happened. The moments of freefall will happen continually affecting everybody’s lives, but people can be prepared. (Hajkowicz 2015, 1-3 & 180-181.)

Hajkowicz (2015, 3-4) compares a megatrend to an ocean current - a powerful force constantly reshaping the world. Just like the ocean current, without diving the megatrend might get ignored. It is often unprofitable to swim directly against it or to let the force lead the way. To get along with this force, one needs to know how to navigate in it. Therefore, strategy is needed to make the right choices at the right moment for achieving one’s objectives. (Hajkowicz 2015, 3-4.)

Megatrends are connecting and combining and are often followed by a countertrend. They are gradual changes that eventually have an explosive impact changing the world and causing new risks and offering new possibilities. When the signals are overwhelming it is too late to act. To take proactive actions and successfully survive from the freefall means that one needs to read the early signals before they become too strong. For this, the scenario-planning exercise could be a good tool to think all the possible outcomes that a megatrend could arise and with its help make wiser choices to achieve the preferred future. (Hajkowicz 2015, 29 & 37 & 167 & 179.)

#### 4.4 Weak Signals heralding the Emerging Change

Weak signals are the first signs of an emerging issue or small event indicating the possible change in the future. They are small with low visibility that appear to be irrelevant at a first glance. But the weak signal can provide a hint of what might be happening in the future. A separate weak signal might not mean a thing but when several weak signals are pointing to the same direction it can be heralding an emerging change. The value of a weak signal can be evaluated only with a hindsight and the strength of it can be measured by its visibility or quantity. By collecting a range of weak signals, it is possible to find patterns indicating the possible change. Weak signals are not the same as emerging issues, but they are signs of them. Emerging issues on the other hand are single events or a small group of events, and they can reveal possible future trends, megatrends, or wild cards. (Hiltunen 2010, 3-10, 74, 99, 104.)

Hiltunen (2013, 67) states that weak signals are “matter of new and thought-provoking issues”. One way to test whether a piece of future information is a weak signal is to present it in the coffee table and if the others either laugh at it, deny it, wonder at it, have not heard from it before, or think that should not be talked anymore, it might be as one. Weak signals can be for example new stories of single events or new business ideas or innovations as well as notes in a researcher’s diary, blog post or rumour. Weak signals are not so public, they appear only in a few channels. (Hiltunen 2010, 6-7, 104.)

It is difficult to understand weak signal’s connection to the forthcoming situation as it not necessarily a statistically plausible continuum for the previous events. A weak signal can have an important part in development process of the future, or it can even redirect the course of events. It is also possible that the weak signal does not have an effect at all. It is not so simple to identify nor interpret the weak signals as they are. (Heinonen et al. 2017, 312).

The impact of weak signal on the future is not certain; it can be mild or huge. By detecting and analysing weak signals there is a possibility to anticipate and act upon the huge harmful changes, but it is important to consider all the possible outcomes and futures when thinking about weak signals. There are two kinds of weak signals, primary and secondary exosignals.

Primary exosignal is a signal that is directly connecting to an emerging issue such as visual observation of the issue. Secondary exosignal on the contrary, is a signal that have been interpreted and disseminated by someone, but it can be distorted on its way when people interpret it differently from the authentic source. (Hiltunen 2010, 6, 74-75, 96, 104-105.)

Organisations can try to search for weak signals so that they have better time to react for the emerging changes. Organisations can identify the risks and react them and affect the changes. They can also utilize the opportunities for new innovations. Innovating the futures can be done by breaking the mental models and weak signals can be helpful for thinking differently. Organisations must understand the concept of change to evaluate and act upon the issues. It is important to react on the issue at right time as the opportunity might not last for long. So, the emerging issues should be evaluated as soon as they are noticed and act upon them if their impact is relevant for the organisation. Inside the organisations, the employees are the ones that are the eyes of the organisation and therefore their role in spotting the weak signals should be emphasised. (Hiltunen 2010, 3-7 & 105-106, 110.) Also, after an organisation has collected weak signals, it is possible to combine them into emerging trends and start to think about different futures by creating scenarios. (Hiltunen 2013, 78.)

#### 4.5 Wild Cards Suddenly Changing Everything

Wild Cards are sudden and unexpected events (Heinonen & Ruotsalainen 2017, 283) which nobody saw coming (Hajkowicz 2015, 180). The concept of Wild Card has been discussed since 1970s and is a synonym to Black Swan which was introduced by Nassim Taleb in 2007. Both relate to discontinuities, meaning that they are non-linear and surprising. (Heinonen & Ruotsalainen 2017, 285.) Wild Cards are rapid events (Hiltunen 2010, 10) that affects dramatically the whole globe (Heinonen et al. 2017, 301). Hiltunen (2013, 90-91) reminds that Wild Cards can happen on different levels - on global, national, or local level - and can be caused by nature such as eruption of a volcano or a local storm, or by human actions such as a terrorist attack or a war.

Heinonen and Ruotsalainen (2017, 284-285) characterize Wild Cards by their “rarity, extremity and the post-event efforts to explain it” and mention that the wide impacts can be either unfortunate or fortunate. Wild Cards are usually natural disasters, but they have multitude consequences. Their far-reaching impacts can be shown both on social, political, economic, technological, and ecological level. While most of the consequences are negative such as economic losses, some positive results are possible such as technological improvements. Some of the nearest Wild Card events are the terrorist attack in New York 2001 called 9/11, Indian Ocean tsunami in 2004, global financial crisis in 2008 and an eruption of a volcano in Iceland causing a problematic ash cloud in 2010. (Heinonen & Ruotsalainen 2017, 283 & 288.)

Because of the rapidity of Wild Cards, it is difficult to anticipate them and thus they are surprising (Hiltunen 2010, 73). Their major consequences partly happen due to people are not prepared to them. Wild Card can be perceived as a risk or uncertainty. Risks are related to survival and continuity, and unexpected events with unclear impacts often threaten them and affect the feeling of insecurity. Future is full of possibilities and risks, but only fraction will come true. But the risks need to be identified and managed when realised. (Heinonen & Ruotsalainen 2017, 285-287). Heinonen and Ruotsalainen (2017, 287) identify current primary risks emerging from social, environmental, and energy-related issues which need to be considered alongside with economic and technological risks, and they remind that risks can be both physical and virtual.

People tend to close their eyes to unpleasant changes which makes anticipating large-scale threats difficult. But Wild Cards can happen anyone and they should be taken seriously, especially in a corporate world. There are only a few Wild Card scenarios that companies have prepared for, such as fire events, but many possible Wild Cards are completely left out. It is also good to acknowledge that Wild Cards can impact on different levels within an organisation; They may hit for example an individual employee or the whole group as well as they may hit the company's products or facilities. But in any case, they may have a major impact on the operational environment. (Hiltunen 2013, 97 & 103-104.)

Even though Wild Cards are difficult to anticipate, it is important to try due to their huge impact on the future. One way to try to anticipate the Wild Cards is to look Weak Signals. They may indicate the change but are quite invisible. (Hiltunen 2010, 96.) Weak Signals can be seen as indicators of Wild Cards providing information on possible changes with unknown directions, but also signs of possibly emerging trends may point to the direction of a Wild Card (Heinonen & Ruotsalainen 2017, 283 & 286). Once the weak signals have been detected, it is possible to anticipate possible Wild Cards before their appearance and contemplate different Wild Card scenarios to prepare for them (Hiltunen 2013, 91-93).

According to Heinonen and Ruotsalainen (2017, 283), one of the main points of future studies is to emphasize the possibility of unexpected events and the capacity to anticipate them, which both are crucial for reducing the vulnerability of the society and proactively adapting activities so that they sustain the impacts of such events. They state that anticipating and analysing the Wild Cards is related to several issues e.g., they are epistemological and semiotic issues, they are related to risks and uncertainties, and they are useful for a future's learning process. There is no existing common methodology for anticipating the Wild Cards and it is impossible to predict them by looking at trends from the past or occurring at the moment. The past Wild Card events can give us a collective learning and can be regarded as a practical tool for adapting the constant change. By learning from the Wild Cards, people can start to think in more non-linear way and use imagination for confronting the possible

challenges in the future. Wild Cards can teach us to expect the unexpected, imagine the unimaginable and know the unknown and thus develop our ability to prepare for extreme futures. (Heinonen & Ruotsalainen 2017, 283-288.) With the help of the Wild Cards, it is easier to understand how the “current structures, thinking and behaviours should be changed to survive in our turbulent world” (Heinonen & Ruotsalainen 2017, 289).

## 5 Research Methods

The research is qualified future’s study. It is done by using Strategic Foresight. Strategic Foresight uses systematic approach to gain an insight of the future and how it can be used by organisations. The Strategic Foresight is presented in the Chapter 5.2.

This foresight research about Nauvo’s tourism with its phases and wanted results are presented in the Figure 1. It begins with the Environmental Scanning (See Chapter 5.2) in which the operational environment of the tourism in Nauvo is examined from political, economic, social, technological, environmental and consumer’s point of view. Here the different drivers of change are explored by reading variety of articles, studies and strategies affecting the tourism industry, especially in archipelago Finland. The findings are collected and grouped with the help of post it -notes and then moved onto the table with above-mentioned categories to process the data easier. Based on the findings, the interview questions are made for the next phase.

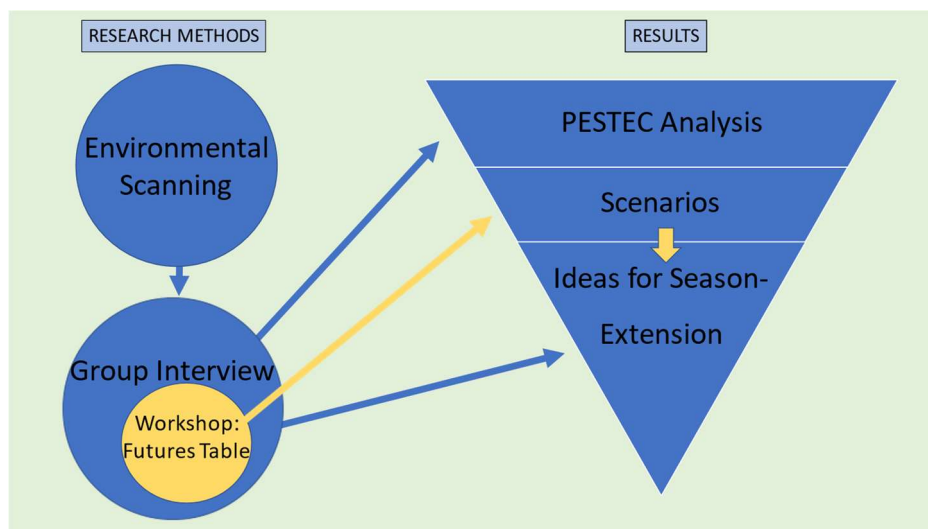


Figure 1: Research methods and wanted results

The second phase of the research is the Semi-Structured interview (see Chapter 5.3), which was intended to be conducted as a group interview but was realised as individual interviews. Here the experts are discussing about the findings emerged from the Environmental Scanning and how they see the changes are impacting on the tourism in Nauvo. The wanted result from this part of the interview is the complete PESTEC analysis about Nauvo's tourism.

In the third phase, the scenarios are made using the Futures Table (See chapter 5.4). The participants fill in the Futures Table to create three different future's pathways that forms the narratives for the scenarios. The scenarios are used strategically to think about the possible futures and to get development ideas for season-extension in the given situations. The wanted results are both the scenarios and the development ideas. The results of the whole process are presented in the Chapter 6.

### 5.1 Strategic Foresight

"Futures research is a field of science which is based on the study of many possible futures" (Heinonen et al. 2017, 305). There are three terms that describe the basic elements of futures research: multiplicity, multidimensionality, and investigation. The term multiplicity means that there may be multiple possible futures. The term multidimensionality refers that the possible futures can be explored from different angles, such as from social, economic, political, or technological perspective. The term investigation emphasizes that "the future can be investigated and knowledge about the future can be gained which can serve as a valuable input to today's decisions about the future." (Van der Duin 2006, 39.)

Futures research typically uses qualitative data collection methods. The methods direct the approach of what direction the future should be investigated. There are many different tools, which are used during the research process e.g., brainstorming, expert-interviewing and group discussion. The tools are basic elements of the futures research and process needs a variety of them. (Van der Duin 2006, 39-40.)

Foresight can be seen as a synonym for future research (Van der Duin 2006, 45). The term also refers to different planning methodologies. The foresight has a practise-oriented approach to future studies. With foresight, one aim to understand the present and the future. It analyses futures information by describing the futures, creating, developing, and utilising the systems. (Heinonen et al. 2017, 304.)

Strategic foresight is a form of foresight. It is used to help decision making. (Heinonen et al. 2017, 310.) It identifies the changes the organisation needs to make to be successful in the future (Lustig 2017, 69). With strategic foresight a holistic picture of the environmental changes can be achieved, and the needed development directions can be predicted.



(Heinonen et al. 2017, 310.) The strategic foresight starts with understanding the need of change and ends with making the changes (Lustig 2017, 69).

Every organisation has strategy e.g., for addressing markets, handling competitors, and serving customers and stakeholders. Strategy might be inflexible framework which does not adapt rapidly to the external changes as they do not take account uncertainty. Strategic frameworks help logical and analytical thinking, but it is not enough today. That is why Strategic Foresight is useful. It gives a framework for discovering, defining, and mapping the uncertainties for identifying obstacles and finding best solutions to tackle them. Strategic foresight can be compared to strategic navigation, which requires identifying, planning, and controlling the journey to notice the obstacles and avoid them. (Lustig 2017, 92).

## 5.2 Environmental Scanning

Environmental Scanning is a tool for recognising the changes in the external environment, such as trends. When the trends have been identified, it is possible to make the needed changes to keep the business viable. (Lustig 2017, 70.) Environmental Scanning is defined as a methodology that is standing at the junction point of foresight and strategy (Heinonen et al. referring to Richard Slaughter 2017, 308). It helps organisation to find relevant information and insight from the variety of signals. (Heinonen et al. 2017, 308.) One step in Environmental Scanning is to make meaning from the findings and make them useful by sharing and discussing them with different people to get new perspectives. (Lustig 2017, 87.)

One method for exploring the trends is PESTE (or PESTE(C), STEEPLE, PESTEL, STEEP,). It explores “the drivers of change which are frequently events outside of your control” (Lustig 2017, 86) from different angles and helps to study the future of specific phenomenon or organisation (Heinonen et al. 2017, 308). There are many different variations of this framework and its acronyms. Generally, PESTE stands for the terms “political”, “economic”, “social”, “technological” and “environmental”. The letter “C”, which can be added to the end of PESTE, stands for “cultural”, “citizen” or “client”. (Heinonen et al. 2017, 308.) Lustig (2017) states that STEEPLE is an acronym from the words “social”, “technology”, “economic”, “environment”, “political”, “legal” and “ethical”. Lustig also mentions that it is possible add C for culture and V for values to the acronym. (Lustig 2017, 86.)

The implementation process of this foresight research begins with the Environmental Scanning. Here the different drivers of change affecting the operational environment of the tourism business in Nauvo are explored with the PESTEC method: from political, economic, social, technological, and environmental point of view and the letter “C” stand for a consumer. Megatrends, trends, and wild cards are explored by reading variety of publications, studies, strategies, and news articles considering the tourism industry globally and locally as well as other phenomena that might have an impact on the tourism industry of Nauvo.

Data collection is based on the tourism sector reports of Ministry of Economic Affairs and Employment of Finland from the years 2019 and 2021 and Finland's Tourism Strategy 2019-2025 and Action Plan 2019-2028. The megatrends and trends behind them are collected from The Finnish Innovation Fund Sitra's publications. Then, the already discovered trends in tourism are examined from different kind of sources: news articles, social media posts, trend lists, and events within the tourism industry. The key words "tourism trends", "trending in tourism", "travel trends" and similar are used. After this, new decisions, directions, laws, and strategies that are affecting Finland's tourism industry, such as from Finnish Parliament, European Union, and World Tourism Organisation, are explored. From all above-mentioned sources, the researcher is also explored the impact of COVID-19 pandemics - a sudden event that can be seen as a Wild Card - which has shocked the whole world and have had an affect for many business operations. Especially tourism has been suffering from it, and therefore it is crucial to try to understand the consequences and prepare for the future.

The findings are collected to the post it -notes and divided into the political, economic, social, technological and consumer categories. Then they are moved to the readily categorised tables in Microsoft Excel (see Appendix 1) making the data easier to examine and process. When the data is collected and categorised, the most important findings are selected. The information with their definitions and explanations is typed up and moved to a blank table on a Word document. The document is sent to the experts who will be interviewed about the findings afterwards. The interview questions are made based on the results of the Environmental Scanning. The table of findings from the Environmental Scanning is presented in Chapter 6, Results.

### 5.3 Semi-Structured Interview

The research interview is a meaningful conversation where the interviewer asks clear and concise questions and where interviewee(s) listen carefully and answer them. The aim is to find solution for the issued research question(s) and objectives. There are different types of interviews from highly formalised to informal conversations depending on the level of formality and structure used. The interviews can be categorized to structured interviews, semi-structured interviews, and unstructured interviews. Semi-structured interviews are used to gather rich and detailed set of data and they are usually analysed qualitatively. It is an effective way to collect data if there are variety of questions to be answered, they are complex or open ended, and if there might be a need to change the order of the questions. (Saunders, Lewis & Thornhill 2016, Chapter 10.)

With semi-structured interviews one can explore topics and explain findings. In the interview, there is a list of themes and key questions to cover. The research topic should be known thoroughly, and the themes need to be decided beforehand. They can be derived from the

literature review or researcher's experience for example. (Saunders, Lewis & Thornhill 2016, Chapter 10.) The researcher prepares the questions and follow-up questions in advance. In semi-structured interview, the discussion is narrower, and it is based on the planned areas that support the research question. Interviewees are expected to answer broadly and in detailed to the posed question. (Rubin & Rubin 2012, 31.)

A topical interview is a semi-structured interview, where researcher is searching for specific facts, descriptions, or examples to find solution for the research question. Topical studies try to answer the questions what, when, why, how and with what consequence. The interviewees are selected carefully from the people that would be the most knowledgeable about the topic. In topical studies, the researcher is trying to gather information that a variety of people with different knowledge provide, and then analyse the findings to figure out an explanation to the research question. The interview will be focused on the research question all the time. The result from the interview is a report with researchers own judgements and conclusions about the topic. (Rubin & Rubin 2012, 31-32.) During the topical interview, the interviewer can give the interviewees different tasks such as writing a mind map and ask them to tell what they are writing about, and this material can also be used in the analysing process (Vilkka 2015, 124).

Semi-structured interview can be conducted on a group basis. In a group interview the interviewer facilitate a group discussion to explore the topics. Group interview is ideal for four to twelve participants. The number of participants is depending on the complexity of the topic, the less participants as complex the topic. Typically, the participants are chosen based on their knowledge or experience so that one can learn from them. (Saunders et al. 2016, Chapter 10.)

Especially in the research-supported development projects, where the goal is to create and understand a common language, concepts or course of actions, the group interview could be useful (Vilkka 2015, 124). The advantage of a group interview is that it allows a discussion where different point of views can emerge, and they can be challenged and discussed together. The participants can help researcher with the studies and for example explain concepts. They may also generate and evaluate lots of ideas together. The discussion might reveal important new insights for the research.

Group interviews need to be managed carefully as they are more difficult to facilitate than one-to-one interviews. Group interviews tend to be more unstructured and free-flowing discussions. Interviewer needs to ensure that every person in the group participates and can state their opinion to the posed question. Interviewer might need to encourage the quiet ones to respond. Also, the resulting data need to be recorded all the time. (Saunders et al. 2016, Chapter 10.)

Research interviews can provide valid and reliable data for further investigation. Semi-structured interviews are used to gather rich and detailed set of data and they are usually analysed qualitatively. (Saunders et al. Chapter 10.) Collected data is transcribed meaning that the content is transformed in one form. In the interviews the recordings are discharged in a text form. Then the data can be analysed with different analysing methods. In the semi-structured topical interviews, the transcription is done as literally as possible. The word-for-word original expression can be used in the final research report. (Kananen 2014, 99-102.)

With the content analysis the data can be analysed systematically and objectively to gain a gain an image of the phenomenon in a compact and generalised form. Content analysis can be done deductively categorisation being made based on the previous conceptual system. (Tuomi & Sarajärvi 2018, 117 & 127.) The deductive content analysis begins of the formation of an analysis body (Tuomi & Sarajärvi 2018, 127 referring to Sarajärvi) and inside it the different categorisations are being formed. Before the analysis an analysis unit - either single word, sentence, expressions or set of ideas - should be specified. In the analysis the original expression of data is reduced so that all the unimportant information to the research is deleted. The reduced expressions are listed and grouped. After this the clustering is being made with finding the similarities and differences of the expressions. The subclass is formed under the themes that are brought from the previous conceptual system. (Tuomi & Sarajärvi 122-124)

The implementation of process of the Semi-Structured interview for this thesis was intended to be conducted as a group interview. Here the experts - employees of local DMO and tourism business owners and employees in Nauvo - were supposed to discuss about the findings from the Environmental Scanning and how they see the changes are impacting on the tourism in Nauvo. The aim was to find different angles for the topics and possibly achieve new ideas and common understanding for the conclusion. With the help of the interview, the deeper understanding of Nauvo and its future tourism could have been formed. The interview was supposed to conduct online, via video call which could be recorded.

The invitation to the group interview was sent to 15 companies and tourism professionals, with intention to get five to eight interviewees, of which three replied and agreed. The agreed group interview was intended to hold on the 2nd of May 2022, but it was cancelled due to the interviewees' timetable problems. Instead, the interviews were conducted individually and only two of them was realised. The interview material - the results of the Environmental Scanning and interview questions - was provided beforehand for the interviewees, so that they could get to know the topic before the interview. Instead of making a video call, the first interview was conducted face to face and the second via phone, from the wish of the interviewees. The interviews were done in Finnish language, and they were recorded. The interview was transcribed literally, but the filler words have left out.

The qualitative content analysis was then made deductively, according to the original plan. The top themes were driven from the theory and put onto the analysis body. The analysis unit was then determined as being a set of ideas as the research interview questions and concepts were so broad. The most interesting findings and their original expressions were placed under the top themes and after the theming, they were reduced. The reduced expressions were then grouped. These grouped expressions were then formed the subthemes. After the content analysis was made, the results were translated to English. The interview questions are attached onto the Appendix 2.

#### 5.4 Scenarios

Scenario thinking plays a central role in futures research. Scenarios are narrations of the alternative futures including description of actors and processes but also the chain of decisions made with their consequences. (Heinonen et al. 2017, 310.) The narrative needs to be in such form that everybody can understand how it might feel to live there and how people would be interacting and what they would be doing for work and in free time for example. Scenarios are consistent and they make sense of the possible futures. They are based on the emerging trends that have been found from Environmental Scanning and their pathways as well as how they merge and combine to each other. Scenarios are made by thinking, separating, innovating, and generating new possibilities across the different time horizons. (Lustig 2017, 101-102.)

With the help of scenarios an organisation can consider its role in each developed future; what needs to be done to get there, how to be successful and what are the risks and advantages. Although the scenarios probably do not come true in that form, they help to see the early warning signs and respond them quicker with appropriate strategy. It is possible to have a greater flexibility to react to unexpected happenings when the scenario thinking has been practiced. In Strategic Foresight, the scenarios are created to plan and test the organisations' strategy. With this approach an organisation can figure out different options and decide which of them to implement for reducing the risks and capitalizing the opportunities. (Lustig 2017, 101-102.)

Scenario process uses a group of methods to create the alternative futures (Heinonen et al. 2017, 310). There are many possible ways to develop the scenarios, such as using Futures Table. The Futures Table helps to think about the different variables of identified changes and what different possible outcomes they have. The scenarios will be developed by connecting different options of the variables. The most important variables will be collected on the left side of the table. To the top row, the different options of future states will be written. The table will be filled in by thinking about the variables in these different

situations. When the table is filled in, the different pathways will be created by choosing one option per row and drawing a line between the rows so that they are relatively logical. From these pathways the scenarios will be built. It is possible to build as many scenarios as necessary. (Lapin Liitto 2019.)

The implementation process of scenario working in this foresight research, was intended to be executed during the group interview as a workshop basis. In the interview, the interviewees were planned to fill in the Futures Table. As the group interview did not work out, the workshop was conducted separately in different composition. The scenario workshop was held online in three sessions during August and September 2022. The participants were group of three tourism professionals of which one was also participant in the semi-structured interview. All the participants have experience in developing services in Nauvo, and therefore they had an adequate expertise about the topic.

Participants were discussing freely about the findings of Environmental Scanning and Semi-Structured interview and thinking about the possible outcomes of the given changes. The participants were asked to select the most important change from each PESTEC sector, so that there would be at least six different kinds of variables. They had the chance to pick some extra variables if they were considered important to the subject. The maximum number of variables was limited to ten. They ended up choosing seven variables, two from political changes and one from the other sectors. After the decision, the chosen variables were organised to the order of importance.

The selected changes were written to the left side of the Futures Table as variables, most important being uppermost. There were three different options for future states on the top row: desirable future, future that should be avoided, and current situation. The participants were filling in the table accordingly starting from the preferable future of the most important change and ending to the current situation of the least important change on this table. After filling in all the selected changes with their future's state options on the table, three pathways were created to develop three different scenarios. The pathways were created one at a time. All the three pathways started from the different future's states of the most important change; the first from the preferable future, the second from the future that should be avoided and the third from the current situation. Then the rest of the pathways were created by continuing to the next row and choosing the logical option from the given change as an outcome from the previous selected variable option.

After creating the future pathways, the scenarios were built. The chosen future state options were gathered, and the narration were written along with the given changes that influenced each other. The scenarios with the narrations were written shortly to a Word-document to get the whole picture about the possible future. After this, it was possible to strategically think

the development ideas for season-extension in each scenario. The development ideas were gathered to the written format and categorised under the topics of management and marketing, seamless customer experience and supply of services. The created scenarios with their development ideas are presented in the results in Chapter 6.3.

## 6 Results

The results of the Strategic Foresight process are presented separately according to the phases. The Chapter 6.1 gives the results of the Environmental Scanning, which is done with broad data collection in the PESTEC framework. The Chapter 6.2 gives the results from the Semi-Structured interview in the own subchapters of political, economic, social, technological, environmental, and consumer changes in Nauvo. The Chapter 6.3 gives the results of the scenario work with own subchapters for the three different future narratives and the development ideas based on them.

### 6.1 Environmental Scanning

After a broad data collection, the Environmental Scanning was made with the help of PESTEC-analysis. The results are grouped by the themes: political changes, economic changes, social changes, technological changes, environmental changes, and customer changes. All the results of the PESTEC-analysis are first explained in the text mode and then presented in the figures at the end.

The most significant political changes concerned safety and security issues and the environmental legislation. The safety and security issues could be divided into two categories: COVID-19 pandemics and Ukraine war. Both that can be seen as a wild card event that suddenly sprung up with major consequences. COVID-19 pandemics resulted in political decisions of travel restrictions and health security measures. Ukraine war resulted in uncertainty in Europe's tourism and in Finland's safe country image. The environmental legislation concerned new environmental laws and regulations that impact the whole Finnish operating environment. The identified changes in the legislation were carbon neutrality and single-used plastics ban. The political changes with their descriptions are presented in the Figure 2.

The most significant economic changes concerned new economic operating models, employment, and tourism markets. All the areas are impacted by the pandemics. The identified increasing economic operating model shaping service sector was a sharing economy. The identified changes in employment concerned the demand for skilled workforce. The identified changes in tourism markets were increasing nature tourism and domestic tourism as well as Visit Finland's thematic product development for inbound tourism. Both

employment and tourism markets are affected by the seasonality issues, which are now being tried to tackle with the help of Finland's new tourism strategy. The economic changes with their descriptions are presented in the Figure 3.

The most significant social changes concerned the cultural sustainability, inclusiveness and working life. The identified changes in cultural sustainability were overtourism and strengthened cultural heritage. The inclusiveness concerned the senior employees and accessibility issues. And changes in working life were that the work itself is changing and the way of doing work. The pandemics has especially affected to overtourism and the working life. While traveling has decreased in general and overtourism may have lessened in some parts, there have been overcrowding in new areas. The managing of overtourism is also a matter of health security. The working life on the other hand has considerably changed towards distance work along with the pandemics. The social changes with their descriptions are presented in the Figure 4.

The most significant technological changes concerned the travel chains and digitalisation. The identified changes in travel chains were improvements in connections to archipelago and demands for seamless customer experience. The digitalisation has resulted in many identified technological changes which were digitalising business operations, remote work, big data, AR and VR. Also, the seamless customer experience requires digital means. The pandemics has accelerated the development of this digital world. The technological changes with their descriptions are presented in the Figure 5.

The most significant environmental changes considered the environment's well-being and responsibility. The identified changes in environment's well-being concerned climate change and marine pollution. The identified changes regarding responsibility were protection of natural heritage and demands for sustainable practises and certification. Behind all of these above-mentioned changes is the limited ecological carrying capacity and overconsumption of natural resources. The environmental changes with their descriptions are presented in the Figure 6.

The most significant changes were in tourist segments and in sensation seeking. The identified tourist segments were 3G-travellers and extended families, generation Z with its different social media behaviour and increasing Asian middle-class. The travellers within these segments are experience-driven, which is one of the identified changes in sensation seeking together with tranquillity seekers. The pandemics with its travel restrictions has limited the travel patterns of these segments and with its health security measures the sensation seeking has been accelerated, especially from the tranquillity point of view. The consumer changes with their descriptions are presented in the Figure 7.



POLITICAL CHANGES	
<b>Travel restrictions</b>	Coronavirus disease, COVID-19, was announced as global pandemics in March 2020. The infections spread rapidly in Finland and the state of emergency was declared. Travel restrictions were imposed globally and travelling decreased. In Finland air and sea traffic were interrupted and the domestic rail and bus traffic were cut down. The freedom of movement was returned in EU in May and the state of emergency was abandoned in June. Domestic tourism revitalised the business in the summer, but in the autumn second wave hit the world and travel restrictions continued. In the spring 2022, variants of the disease are still present, and the safety procedures have become a “new normal”. Some travel restrictions are still valid despite of the vaccinations and EU’s digital COVID certificate. There have been some speculations that the changes in traffic lines and travel prices would be permanent.
<b>Social responsibility and health security</b>	Finnish organisations are known for being socially responsible; the safety laws, regulations, and instructions are obeyed, and the customers are encountered responsibly. Along with the pandemics, social responsibility is emphasised especially from the health security perspective. Negative attitudes towards travelling were arising, which forced the industry to develop contactless services. Some of the health security procedures might stay for good and they need more investments. The health security should be considered both from the customer’s and employees’ point of view.
<b>Ukraine war</b>	Russia’s invasion of Ukraine in February 2022 has affected the tourism in Europe. The direct impacts of the war are the weakened tourism demand to the neighbouring countries and lack of Russian tourists. The indirect impacts are the increased prices in gasoline, energy, and food. The Russian airspace is avoided and the long-haul flights from Asia are re-routed making the flights being more time-consuming. Travellers are waiting how the situation is evolving. Finland’s destination reputation is slightly worsened. It is important to inform the travellers about the safety and provide flexible options in case of cancellations.
<b>Safe country image</b>	Safety is an important factor in a destination selection, and it effects on the quality of the whole trip. Finland has a competitive advantage because of its society that is stable, safe, and secured. Finnish society is functioning and organised, which makes it reliable and therefore people can trust that travelling to and within Finland is safe.
<b>Carbon neutrality</b>	Global warming is affecting the global and national politics heavily. The warming can be restrained with the help of greenhouse gas emission reduction. Finnish government is decided to achieve a carbon neutrality by 2035, which means that the balance between emitting carbon and absorbing it from atmosphere should be achieved. Tourism, and especially air travelling, produce almost 1/10 of global carbon footprint. This requires emission reductions of the industry and measurements. This could affect the tourism demand for distant destinations as the cost of travel might increase.
<b>Single-used plastics ban</b>	Plastic waste is a global problem, which is particularly seen in coastal area as 85 % of beach litter are plastic. It is said that by 2050 there will be more plastic than fish in the oceans if nothing has done. Microplastics can be found already in air and our food. As most of the plastic waste stranded on the EU beaches are single-use plastics, EU set a directive for them. The directive contains of market restrictions (e.g., plastic cutlery, plates, and straws), consumption reductions and awareness raising. The aim is to reduce plastic waste quantitatively by 2026.

Figure 2: Political changes

ECONOMIC CHANGES	
<b>Sharing economy</b>	Circular economy is an economic model that aims to prevent the waste generation in its production and consumption habits and the materials are circulated. One of the economic operating models is sharing economy, which is about sharing of assets, work, and services via digital platforms. Sharing economy is shaping the service sector rapidly. In tourism, the operating model is mainly used in accommodation, transport, catering, and supplementary services.
<b>Demand for skilled workforce</b>	Before the pandemics in 2019, tourism employed full time approximately 120 000 people and especially it employed young people. Tourism industry as an employer is characterised by its low profitability, irregular and seasonal work, and housing problems, which makes it difficult to find skilled workforce. The pandemics collapsed the tourism industry and affected the employment rates heavily. The industry has not been recovered but for it to happen, it is crucial to have skilled workforce. There might be many tourism professionals unemployed waiting for new opportunities. The attractiveness of the jobs, year-round possibilities, occupational and geographical mobility, and holistic wellbeing of the employees have become important factors that need to be emphasised.
<b>Nature tourism</b>	Nature tourism demand is high, and it has increased during the pandemics. It is based on the natural attractions of a destination providing variety of opportunities, such as for tours, fishing, cycling, kayaking, hiking, scenic driving, photographing, camping, dark sky tourism and do-good holidays. The core action of Visit Finland to increase the inbound tourism demand is to develop sustainable nature tourism. The relevant markets are Germany, France, and the Netherlands.
<b>Thematic offer for inbound tourism</b>	Visit Finland is decided to use a thematic approach to the product development for the inbound tourism. The approach provides growth potential outside the urban destinations and aims for the more even seasonal spread of tourism and season-extension. The decided themes are nature tourism, cultural tourism, luxury tourism, health and wellness tourism, education tourism, sports and physical activity tourism, gastronomy tourism, events and conferences, tours, and family tourism.
<b>Domestic tourism</b>	Domestic tourists account for 70 % of Finland's tourism demand and provide year-round opportunities. The importance of domestic tourists has grown during the pandemics and in tourism recovery. People have increasingly turned into the domestic destinations and activities as well as spend staycations mixed with work. Domestic tourism might be slowed as the international travel continues but the trends of rediscovering the home country and staycations are about to stay. It should be noted that about half of global travellers are planning the next holiday in their own country, which affects the inbound demand and increases the importance of promoting the domestic tourism.

Figure 3: Economic changes

SOCIAL CHANGES	
<b>Overtourism</b>	When the tourist flows increase within a destination and locals and fellow tourists start to react to it, the cultural carrying capacity is exceeded and can be discussed about overtourism. Some of the Finnish destinations are suffering from overtourism during the summer season and one of them is the Archipelago Trails in Turku archipelago, including Nauvo. Nauvo has been increasingly popular destination and in the “pandemic summer” 2020 the record was broken. Even though the revenue was good for the tourism business, the queuing was a problem in some places along the trail.
<b>Cultural heritage</b>	SDGs are targeting to strengthen efforts to protect the world’s cultural heritage and promote local culture and products. Culture should be maintained and strengthened as well as it should be communicated to tourist authentically and respectfully. Visit Finland has paid attention to the lack of knowledge of Finnish culture and lifestyle amongst the foreigners and is developing products now around them.
<b>Changing working life</b>	Today, work is more fragmented, and it is not so dependent on time nor place, and it is more integrated with lifestyle. Aspiration of autonomy and flexibility has increased the number of freelancers and developed gig economy, which gives more power for employees but less loyalty towards employers. Employees should be multiskilled and flexible towards changing situations, which demand continuous competence development. While people are increasingly good multitaskers, it has also negative side-effects with concentration and creativity.
<b>Senior employees</b>	The population is ageing, especially in Western societies with low birth rate and longer life expectancy. In Finland, the population is starting to decline already in 2031, which have an impact in labour market. The working senior citizens can be seen especially in rural areas while younger prefer cities. The senior employees should be acknowledged, and it should be invested in their competence development.
<b>Accessibility</b>	15 % of world’s population have some form of disability and alone in Finland, there are about 800 000 people with reduced mobility, including physical, social, and sensory impairments. SDGs are targeting for accessible cities, basic services, transport systems and green and public spaces by 2030. The disabilities should be considered in the destination planning and tourism services. By providing accessible services, a destination is communicating about quality and values. Tourism development can advance urban infrastructure and accessibility which will benefit the locals as well.

Figure 4: Social changes

TECHNOLOGICAL CHANGES	
<b>Improvements for connections</b>	Functionality of journey to a destination is crucial factor in the destination-selection and is contributing to the quality of the trip. Finnish archipelago destinations are highly dependent on good transport connections and there are plans for improvements for route-systems' infrastructure and signage as well as for electrified rail network and passenger transport services to better serve travellers without a car. It is important to provide information about different transportation options with their routes, timetables, and prices.
<b>Seamless customer experience</b>	As smooth travel chains are crucial in tourism, it is important to make the customer experience more seamless. While travellers can make their trips more efficient and accessible, access real-time information and have a control over their trip all along with the help of mobile devices and different digital channels, tourism businesses should focus on these touchpoints and personalise the services.
<b>Digitalising business operations</b>	The COVID-pandemics has forced businesses to invent new digital operations models. Especially e-commerce has increased considerably, and restaurants have focused on food delivery. Social distancing has shaped services towards contactless modes, e.g., payment transactions have moved online. The online presence of businesses has become crucial and while all activities have moved online, the technological competence has become even more important for everybody.
<b>Remote work</b>	Remote work has become more common which brings new possibilities to tourism business. People are more place independent which enables them to combine work and travel. With telecommuting travel, employees have possibility to telecommute wherever they want and stay there for longer time of periods. Finland as a tourism destination provide great conditions for telecommuting travel due to advanced technology and fast internet connections.
<b>Big data</b>	Internet of Things and machine learning are using sensors capturing enormous amount of information about consumers. This big data provides tourism industry an opportunity to better understand its customers and to create new strategies and business plans based on the information as well as to provide more connected, personalised, and integrated experiences for them.
<b>AR and VR</b>	Augmented reality (AR) and Virtual reality (VR) can be used in tourism. Different applications can be developed for destination exploration with the help of location-based immersive content, audio narration and AR features, for example. VR on the other hand provide an alternative for physical travel.

Figure 5: Technological changes

ENVIRONMENTAL CHANGES	
<b>Climate change</b>	Tourism destinations that are dependent on weather and natural conditions are suffering from the climate change. Summers in Finland is estimated to warm with a degree by 2038. Warming will result in more frequent heat waves, fiercer rainfalls, and milder slushy winters with longer periods without snow. The Finnish summer has potential to attract people escaping the extreme heat, but the arctic winter might not attract anymore. In Nauvo, there might not be snowing at all.
<b>Natural heritage</b>	Environmental carrying capacity is exceeded when natural environment starts to react e.g., by biodiversity loss or degradation. SDGs are aiming to prevent this to happen. As rich biodiversity and natural heritage are usually main pulling factors for tourism, they need to be managed sustainably. In other words, while destinations benefit from the unique operational environment of the clean nature, they are also responsible of conserving and protecting it. Conservation of natural heritage also appeals to the ethical customers.
<b>Marine pollution</b>	One of the SDGs is conserving and sustainably using the oceans, seas, and marine resources for sustainable development. The target is by 2025 to prevent and significantly reduce marine pollution, especially from land-based activities. As coastal and maritime tourism is depending on the healthy marine ecosystem, the tourism development needs to be involved in the Integrated Coastal Zone Management. As Baltic Sea is one of the most fragile and polluted seas in the world, it especially needs immediate actions.
<b>Responsible business practices</b>	Tourism businesses need to invest in responsible practices, which could in turn become a trump card for the business. Some environmental actions are preferring local food, reducing consumption, shifting towards renewable energy and circular economy, and making emission compensations. Tourists and international travel agents are increasingly demanding sustainable options, and therefore it should be invested in the green offer and make them more affordable.
<b>Certification</b>	Businesses need to show their values and tangible efforts for responsible operations to the customers. One way to demonstrate the responsibility and to get credibility is to get certified. Visit Finland has created Sustainable Travel Finland certification program for tourism destinations and businesses to enhance their sustainability and responsible operations and with the label they can have more international visibility in Visit Finland's channels.

Figure 6: Environmental changes

CONSUMER CHANGES	
<b>3G travel and extended families</b>	Multi-generational travel (3G travel) and holidays of extended families refer to multiple generations travelling together. The difference between these two is that in case of extended families' children with (several) grandparents are involved whereas in 3G travel the children are adults, representing the Generation Z. 3G holidays enable large portion of young adults to use more money for the trips than they would on their own. Gen Z is preoccupied in more exotic and adventurous holidays and as they are usually responsible of booking the trip, the whole group most likely end up in active holiday. Both 3G travellers and extended families tend to turn to travel agents for customising the trip in well advance. They demand a larger accommodation and facilities and activities that suits everyone.
<b>Social Media behaviour of Gen Z</b>	Generation Z, so-called Screenagers, are born between the mid-90s and 2010. Technology is essential for them, and they are sovereign in using digital devices. They expect the online presence of the companies and want to use channels where they can find real-time information and where they can interact and co-create. They are heavily relied on social media and reviews and want to share information as well.
<b>Asian middle class</b>	Asian middle class is growing fast and along with the change, it will be the largest social class in the world. By 2027, 36 % of population is expected to constitute of Asian middle class born in 90s and 2000s. They are more likely to consume more and be less price conscious. These tech natives demand for trust and authenticity. Chinese Millennials demand for personalisation, quality, and premium services.
<b>Experience-driven travellers</b>	Travellers are increasingly driven by experiences. People are for example interested in wellness tourism, live experiences, events, luxury, and cultures. They want digital connectivity but also authentically connect with communities and unplugged experiences with them. They are preoccupied in both physical and mental wellbeing; attracted by personal care, healthy food, fitness and psychophysical experiences and personal enrichment.
<b>People seeking tranquility</b>	During the pandemics people have sought out quieter places and enjoyed themselves outdoors. Greater amount of people has rented cottages where they can spend time in peace without contact to other people. Secondary destinations and rural areas have been increasingly interesting for the travellers. This trend might be continuing along with the urbanisation and increased anxiety due to the climate change, digitality and uncertain times.

Figure 7: Consumer changes

## 6.2 Semi-Structured Interview

The themes for the semi-structured interview are based on the most relevant and interesting topics from the Environmental Scanning phase. The political themes are political decisions during COVID-19, Ukraine war, and environmental legislation. The economic themes are sharing economy, skilled workforce, domestic tourism, nature tourism, and thematic approach for inbound tourism. The social themes are changing working life, accessibility, overtourism, and cultural heritage. The technological themes are improvements for connections, digital innovations during pandemics, remote work, and digital applications. The environmental themes are climate change, protection of natural heritage, marine pollution, and demand for responsible business practices. And consumer themes are social media

behaviour of generation Z, experience-driven travellers, 3G travel and extended families, and Asian middle class.

The themes with their emerged sub-themes are presented under their own chapters: 6.2.1 Political changes in Nauvo, 6.2.2 Economic changes in Nauvo, 6.2.3 Social changes in Nauvo, 6.2.4. Technological changes in Nauvo, 6.2.5 Environmental changes in Nauvo, and 6.2.6 Consumer changes in Nauvo. After the presented results from the interviews, the original expressions in Finnish are quoted. The expressions with their literal English translations put in brackets are highlighted in blue background.

### 6.2.1 Political changes in Nauvo

The political changes in the Environmental Scanning formed three themes to be used in the interview and the analysis. Under the theme “Political decisions during COVID-19” five sub-themes were emerged: Uncertainty, Seasonal differences, Domestic travellers, Individual travellers, and Hygiene measures. The theme “Ukraine war” emerged the sub-themes of Uncertainty about Finland’s position, Price increase in island tourism, and Sense of security of the Finns. And the theme “Environmental legislation” emerged the sub-themes: Corporate training, Suitability of measurements, and Practice. The political themes with their sub-themes are presented in the Figure 8.

POLITICAL THEMES	SUB-THEMES
Political decisions during COVID-19	<ul style="list-style-type: none"> <li>• Uncertainty</li> <li>• Seasonal differences</li> <li>• Domestic travellers</li> <li>• Individual travellers</li> <li>• Hygiene measures</li> </ul>
Ukraine war	<ul style="list-style-type: none"> <li>• Uncertainty about Finland’s position</li> <li>• Price increase in island tourism</li> <li>• Sense of security of the Finns</li> </ul>
Environmental legislation	<ul style="list-style-type: none"> <li>• Conscious travellers</li> <li>• Corporate training</li> <li>• Suitability of measurements</li> <li>• Practice</li> </ul>

Figure 8: Political themes with sub-themes

**Political decision during COVID-19:** The political decisions during COVID-19 are still causing uncertainty towards travelling and its safety. Domestic travel has perceived as safer option and Nauvo has been a popular destination. The lack of international travellers did not affect Nauvo’s tourism business as it is mainly a domestic destination. There are seasonal differences how the restrictions influenced tourism as summer destinations, like Nauvo, did

not suffer from them. Group travelling was cut down in Nauvo, but they were replaced by the individual travellers. Tourism businesses have taken the health security seriously adopting the hygiene measures and informing it to tourists. The daily operations in Nauvo are likely to continue in quite traditional means despite the new health security measures.

*“Meidän kohderyhmä on kyllä n. 95 prosenttisesti suomalaisia ja loppu on sitten Euroopasta tai sitten Euroopan ulkopuolisista, mut se ei elätä niiden voimalla.”* (“Our target group is 95 % Finns, and the rest are from Europe or then from outside Europe, but they do not maintain the business.”)

**Ukraine war:** Finland’s location next to Russia raises uncertainty about Finland’s position. It affects people’s thoughts whether it is safe to travel and whether international tourists dare to travel to Finland. On the other hand, Finns have the sense of security; they tend to trust that travelling is safe and do believe in Finland’s position as a safe country. The indirect impact of the war is the increase in cost of gasoline and food, causing price increase in island tourism that is also seen to continue increasing in the future. Also, the high fuel prices would raise the cost of travelling and might lower the use of cars, both affecting the reachability of the archipelago.

*”Jos polttoaineen hinnat pysyy korkealla, niin autoilu vähenee ja yhteydet saaristoon tulee olemaan kalliimpia.”* (“If the fuel prices will remain high, driving would be decreased and the connections would be more expensive.”)

**Environmental legislation:** Tourism companies in Nauvo receive corporate training about the environmental topics and needed measures from the local and national DMO’s. The ability to make measurements for the emission and waste reduction seemed to depend on the size of the company affecting the suitability issues for measure. The new directions have not yet influenced much for the daily operations and practices of the tourism businesses in Nauvo. The sub-theme of “conscious travellers” were moved from here under the theme “Demand for responsible business practices”.

*”Meil on kova yhteistyö Visit Paraisten kanssa ja Visit Finlandin ja heidän kauttaan ollaan käyty koulutuksia ja näin, mut ei silleen et meil olis omia mittareita”* (“We have a strong cooperation with Visit Parainen and Visit Finland, and through them we have carried out trainings and so on, but not in a way that we would have our own measuring instruments.”)

### 6.2.2 Economic changes in Nauvo

The economic changes in the Environmental Scanning formed five themes to be used in the interview and the analysis. The theme “Sharing economy” emerged the sub-themes of Potentiality, Self-dependent companies, Accommodation demand, and Platform trials. The theme “Skilled workforce” emerged six sub-themes: Journey to work, Limited free-time activities, Lack of information, Imbalanced salary and cost of living, Seasonality issues and



temporary work, and Working environment pulling factor. The theme “Domestic tourism” emerged the sub-themes of Attractiveness of archipelago, Increasing demand, Overcrowding, and Investments. The theme “Nature tourism” emerged the sub-themes of Increase in cycling and photographing, Need for shared platform, and Nature path development. And the theme “Thematic approach for inbound tourism” emerged six sub-themes: Importance of season-extension, Versatility of Nauvo, Potential from gastronomy, Educational tourism, Unaware tourism companies, and Attractiveness of thematic packages. The economic themes with their sub-themes are presented in the Figure 9.

ECONOMIC THEMES	SUB-THEMES
Sharing economy	<ul style="list-style-type: none"> <li>• Potentiality</li> <li>• Self-dependent companies</li> <li>• Accommodation demand</li> <li>• Platform trials</li> </ul>
Skilled workforce	<ul style="list-style-type: none"> <li>• Journey to work</li> <li>• Limited free-time activities</li> <li>• Lack of information</li> <li>• Imbalanced salary and cost of living</li> <li>• Seasonality issues and temporary work</li> <li>• Working environment pulling factor</li> </ul>
Domestic tourism	<ul style="list-style-type: none"> <li>• Attractiveness of archipelago</li> <li>• Increasing demand</li> <li>• Overcrowding</li> <li>• Investments</li> </ul>
Nature tourism	<ul style="list-style-type: none"> <li>• Increase in cycling and photographing</li> <li>• Need for shared platform</li> <li>• Nature path development</li> </ul>
Thematic approach for inbound tourism	<ul style="list-style-type: none"> <li>• Importance of season-extension</li> <li>• Versatility of Nauvo</li> <li>• Potential from gastronomy</li> <li>• Educational tourism</li> <li>• Unaware tourism companies</li> <li>• Attractiveness of thematic packages</li> </ul>

Figure 9: Economic themes with sub-themes

**Sharing economy:** The sharing economy is seen to have potentiality in Nauvo bringing new possibilities. It seems that most of the companies are self-dependent being quite apart from each other and leaning more to work independently. In Nauvo, the sharing economy is mostly concentrated in accommodation services, which influences the accommodation demand negatively. There have been platform trials in sharing the services, but they have not been suitable for the companies.

*"Nauvossa on kyllä aika varmasti 15 mökkiä, jotka on vuokrattu Airbnb:n kautta ja se taas vähentää hotellikysyntää." ("There are almost certainly 15 cabins that are rented through Airbnb which in turn decrease the hotel demand.")*

**Skilled workforce:** Nauvo has some difficulties to attract skilled workforce. The journey to work is challenging from the mainland and there are limited housing possibilities on the island. There are limited free-time activities on the islands, which need special attention to the employees to enjoy themselves. There is a lack of information about working and living environment that archipelago provides that limits the appeal for skilled workforce. The salary and cost of living are imbalanced as it is quite expensive to live on the island. Seasonality issues and temporary work seems to be the main cause why the island does not attract the tourism professionals enough. The island provides mainly summer jobs and temporary contracts, therefore fitting better for students - who might be from other disciplines than tourism and hospitality. The working environment is seen as a pulling factor; The archipelago and the communality of employees provide unique surroundings and atmosphere for work.

*"Onko pakko lähteä hakemaan oman alan duunia vai jatkaa sillä tavalla ihan vaan kesätöissä, koska se on kivaa olla saarella töissä." ("Is it necessary to apply for a job from one's own discipline or then continue by just being in a summer job, because it is fun to work on an island.")*

**Domestic tourism:** The attractiveness of archipelago has been noted by the domestic travellers and in marketing. There is an increasing demand for the domestic tourism in Nauvo. There has been overcrowding in some places during the summertime, which could be seen especially in ferry ports. Investments has been and will be made in domestic tourism development by improving the services and connections.

*"Saaristomatkailu ylipäättään Suomessa on jotenkin nousemassa, et sitä kaupungit ja kaikki vähän enemmän markkinoi." ("Archipelago tourism is in the first place somehow increasing in Finland, so that the cities and everybody are marketing it some more.")*

**Nature tourism:** Nature tourism is popular in Nauvo and demand has increased during the pandemics. Especially, there has been increase in cycling and photographing. There has been investments and improvements in Nauvo considering the growing nature tourism demand, especially in nature path development. The interview revealed that there is a need for shared platform; attractions, activities, services and booking systems should be found from the same place as now the information is fragmented.

*"Metsähallitus on tehnyt luontopolkuja ja parantanut heidän osaa siellä." ("Metsähallitus has developed nature paths and improved their parts in there.")*

**Thematic approach for inbound tourism:** The approach raised interest and the importance of the season-extension in Nauvo was noted. The versatility of Nauvo provides many

opportunities for thematic development. Especially potential from gastronomy emerged Nauvo having many players in the field. Educational tourism is one distinct theme in Nauvo's offerings that could be tapped more. Although many possibilities arose from the themes, tourism companies are unaware of this thematic approach of Visit Finland. Nevertheless, attractiveness of thematic packages was realised, and all the themes were appreciated.

*"Kauden pidentäminen on tärkeä meille ja siihen tehdään aina enemmän ja enemmän." ("The extension of season is important to us and work for it is being done more and more.")*

### 6.2.3 Social changes in Nauvo

The social changes in the Environmental Scanning formed four themes to be used in the interview and the analysis. The theme "Changing working life" emerged four sub-themes: Place-dependent industry, Potential of gig-economy, Support and training, and Need for functioning environment. The theme "Accessibility" emerged the sub-themes of Co-creation, Observance of regulations and Challenges of the landscape. The theme "Overtourism" emerged five sub-themes: Feelings about queuing, Decentralisation, Season-extension, Dictating connections, and Capacity. And the theme "Cultural heritage" emerged the sub-themes of Packages around culture, Atmosphere, and Significance of history. Social themes with their sub-themes are presented in the Figure 10.

SOCIAL THEMES	SUB-THEMES
Changing working life	<ul style="list-style-type: none"> <li>• Place-dependent industry</li> <li>• Potential of gig-economy</li> <li>• Support and training</li> <li>• Need for functioning environment</li> </ul>
Accessibility	<ul style="list-style-type: none"> <li>• Challenges of the landscape</li> <li>• Observance of regulations</li> <li>• Co-creation</li> </ul>
Overtourism	<ul style="list-style-type: none"> <li>• Feelings about queuing</li> <li>• Dictating connections</li> <li>• Capacity</li> <li>• Decentralisation</li> <li>• Season-extension</li> </ul>
Cultural heritage	<ul style="list-style-type: none"> <li>• Atmosphere</li> <li>• Significance of history</li> <li>• Packages around culture</li> </ul>

Figure 10: Social themes with sub-themes

**Changing working life:** The tourism and hospitality in Nauvo are place-dependent, apart from some office work that could be done remotely. Gig-economy brings potential to the archipelago with the freelancers willing to work in different locations. It was noted that it is important to provide support and training for the employees as the work and needed skills are in constant change. There is a need for a functioning environment with all the necessary services and facilities for people wanting to live on the island.

*“Nää freelanceritkin tekee monenlaista, niin he vois ollakin potentiaalisia, vois mennä saaristoon töihin.”* (“These freelancers are doing diverse things, so they could be potential, they could go working to the archipelago.”)

**Accessibility:** Providing accessible tourism services in Nauvo is limited due to the challenges of the landscape that the archipelago forms. However, the tourism companies are responsible, and all the regulations are observed. The development of accessibility is seen to require co-creation together with the target group.

*”Tollasessa kulttuurimaisemassa, siinä ei voi tehdä sen suurempia muutoksia.”* (“In that kind of cultural landscape, one cannot make that bigger changes in it.”)

**Overtourism:** There have been some issues in Nauvo regarding the overtourism during summers. The queuing to the ferries has raised feelings among the visitors and locals. There is a limited accommodation capacity, but the companies have transformed their facilities to better meet the demand. The connections are dictating where the visitors can go and what time. To prevent the overtourism, it is seen that decentralisation of the tourism services and tourists as well as season-extension are some solutions.

*”Se on se ongelma, kun ei oo niitä yhteyksiä, et ne ei ole tasapuolisia saarten välillä.”* (“That is the problem, when there is not those connections, that they are not equitable between the islands.”)

**Cultural heritage:** The intangible cultural heritage of Nauvo is in its archipelagic atmosphere and in its lively harbour area. The significance of history was noticed; most of the tangible cultural heritage of Nauvo seems to consist of the historical places and artifacts. The promotion of the local culture of Nauvo could be done by providing packages around the culture.

*”Niin tunnelma siinä, se houkuttelis suurinta osaa ihmisistä.”* (“So the atmosphere in it, it would draw most of the people.”)

#### 6.2.4 Technological changes in Nauvo

The technological changes in the Environmental Scanning formed four themes to be used in the interview and the analysis. The theme “Improvements for connections” emerged five sub-themes: Constructed roads, Intensified ferry connections, Journey planning platforms, Need

for seamless connections, and Importance of real-time information. The theme “Digital innovations during pandemics” emerged the sub-themes of “Traditional means” and “Need for digital reform”. The theme “Remote work” emerged the sub-themes: Telecommuting from cabins, Accommodation packages and Longer duration of stay outside season. And the theme “Digital applications” emerged the sub-themes of “Virtual tours” and “Live camera”. The technological themes with their sub-themes are presented in the Figure 11.

TECHNOLOGICAL CHANGES	
Improvements for connections	<ul style="list-style-type: none"> <li>• Constructed roads</li> <li>• Intensified ferry connections</li> <li>• Journey planning platforms</li> <li>• Need for seamless connections</li> <li>• Importance of real-time information</li> </ul>
Digital innovations during pandemics	<ul style="list-style-type: none"> <li>• Traditional means</li> <li>• Need for digital reform</li> </ul>
Remote work	<ul style="list-style-type: none"> <li>• Telecommuting from cabins</li> <li>• Accommodation packages</li> <li>• Longer duration of stay outside season</li> </ul>
Digital applications	<ul style="list-style-type: none"> <li>• Virtual tours</li> <li>• Live camera</li> </ul>

Figure 11: Technological themes with sub-themes

**Improvements of connections:** In Nauvo area, the roads and cycle lanes are constructed, and the ferry connections intensified to better meet the demand. The journey planning platforms are being relied on for visitors to find the wanted information of the businesses and routes. There is a need for more seamless connections to the archipelago. The importance of real-time information was highlighted; it should be easier to find all the contact details, travel options and timetables but also to know the current traffic situation at the ports.

*“Tulee sellanen epävarmuus et pääseekö silloin kun sä oot menossa.” (“Kind of uncertainty comes that will you get there when you are going.”)*

**Digital innovations during pandemics:** The businesses in archipelagos have operated in quite traditional means and digital innovations have not been made despite the pandemics. It was noted that there is a need for digital reform to keep up with the digital development and new needs of the consumers.

*“Se on vähän vaikea kehittää asioita, jos ei tavallaan uskalleta mennä eteenpäin.” (“It is quite difficult to develop things, if in a way one has no courage to move forward.”)*

**Remote work:** Telecommuting from cabins have been increasingly popular in Nauvo. Tourism companies have developed accommodation packages for remote workers due to the growing demand. The remote workers in general have had longer duration of stay outside the season, which has brought new stream of year-round revenue for Nauvo.

*"Meil on ollut kauden ulkopuolella sellasii majoituspaketteja, jotka on ollut suunnattu just niille etätyöntekijöille."* ("We have had that kind of accommodation packages outside the season, which have been directly aimed for those remote workers.")

**Digital applications:** Nauvo has not used digital applications much in tourism development. Virtual Reality is used in educational virtual tours in Nauvo, but the advantages of virtual tours have yet to be utilised in tourism. One development idea that emerged was to place live cameras to showcase potential tourists the archipelago's wildlife to evoke interest.

*"Nähtäis mitä siellä on ja miten saaristo toimii."* ("Could be seen what it is in there and how the archipelago functions.")

#### 6.2.5 Environmental changes in Nauvo

The environmental changes in the Environmental Scanning formed four themes to be used in the interview and the analysis. The theme "Climate change" emerged the sub-themes: Unpredictability of weather, Availability of drinking water, Prolongation of travel season, and All-weather activities. The theme "Protection of natural heritage" emerged the sub-themes: Protected areas, Challenging waste disposal, Awareness raising, and Access with guides. The theme "Marine Pollution" emerged the sub-themes: Cause for concern, Involvement, Self-sufficient infrastructures, and Pollution prevention. And the theme "Demand for responsible business practices" emerged the sub-themes: Conscious travellers, Price against value, Responsibility as self-evidence, Certification as supervisors, and Differences in certification programs. The environmental themes with their sub-themes are presented in the Figure 12.

ENVIRONMENTAL THEMES	SUB-THEMES
Climate change	<ul style="list-style-type: none"> <li>• Unpredictability of weather</li> <li>• Availability of drinking water</li> <li>• Prolongation of travel season</li> <li>• All-weather activities</li> </ul>
Protection of natural heritage	<ul style="list-style-type: none"> <li>• Protected areas</li> <li>• Challenging waste disposal</li> <li>• Awareness raising</li> <li>• Access with guides</li> </ul>
Marine pollution	<ul style="list-style-type: none"> <li>• Cause for concern</li> <li>• Self-sufficient infrastructures</li> <li>• Pollution prevention</li> <li>• Involvement</li> </ul>
Demand for responsible business practises	<ul style="list-style-type: none"> <li>• Conscious travellers</li> <li>• Price against value</li> <li>• Responsibility as self-evidence</li> <li>• Certifications as supervisors</li> <li>• Differences in certification programs</li> </ul>

Figure 12: Environmental themes with sub-themes

**Climate change:** The unpredictability of weather brings challenges to tourism business in Nauvo influencing the sales. Availability of drinking water might become a problem in the archipelago along with warming climate and longer periods of drought. The shorter winters are seen to bring possibilities for prolongation of travel season as Nauvo's tourism is not dependent on the winter. Nauvo is seen to provide all-weather activities.

*"Jos on pitkäänkin kuivaa, niin saaristossa on hankalaa tuottaa juomavettä." ("If it is dryer for long, it is difficult to produce drinking water at the archipelago.")*

**Protection of natural heritage:** Most of the natural areas in Nauvo are protected by Metsähallitus and belonging to the Natura 2000 network. One challenge in the archipelago is the waste disposal and recycling, but they have still been managed adequately. It is seen that to protect the nature, awareness raising should be done amongst the visitors for them to know how to behave in natural areas. One idea is to use specialised guides for tourists to access some vulnerable areas.

*"Seilin alue on Natura 2000 ja sit on myös näitä luonnonsuojelualueita." ("Seili region is Natura 2000 and then there are these nature reserves.")*

**Marine pollution:** The polluted Baltic Sea is a cause for concern in Nauvo. The islands do have a self-sufficient infrastructure to manage the solid waste and wastewater. The most

important action done from the tourism companies, is the marine pollution prevention by not letting anything ending up into the sea. One development idea is to involve the community and visitors to clean the coastal areas by organising events.

*“Mitään ei päästetä vesille, tehään jo kaikki mitä voidaan tehdä.”* (“Nothing is discharged into the waters, it is being done all that can be done.”)

**Demand for responsible business practices:** The tourism industry is aware of the conscious travellers who could be attracted by the environmental measures of the companies. There is a confrontation between price and value, should the eco-friendly service be selected or the cheaper one. It is seen that responsibility should be self-evident for the companies. The certifications could function as supervisors encouraging companies for better actions, but there are many kinds of certification programs and not all of them suits for SME’s .

*”Sen pitäis olla itsestään selvää yritykselle, et huolehditaan niistä asioista, et ei tarvitse erikseen hakea [sertifikaattia]”. (”It should be self-evident for a company, that these issues are being taken care of, so that it is not necessary to apply for [the certificate]”.)*

#### 6.2.6 Consumer changes in Nauvo

The consumer changes in the Environmental Scanning formed four themes to be used in the interview and the analysis. The theme “Social media behaviour of Gen Z” emerged the sub-themes: Archipelago’s appeal, Potential in marketing and Gen Z as minor target group. The theme “Experience-driven travellers” emerged the themes: Events and markets, Well-being from nature, and Cultural experiences. The theme “3G travel and extended families” emerged the sub-themes of “Services to fit all” and “Demand for range of activities”. And the theme “Asian middle class” emerged four sub-themes: Uncertainty of the segment, Exotic accommodation with proper settings, Sauna experience, and Potential from organised boat trips. The consumer themes with their sub-themes are presented in the Figure 13.



CONSUMER THEMES	SUB-THEMES
Social media behaviour of Gen Z	<ul style="list-style-type: none"> <li>• Archipelago's appeal</li> <li>• Gen Z as minor target group</li> <li>• Potential in marketing</li> </ul>
Experience-driven travellers	<ul style="list-style-type: none"> <li>• Events and markets</li> <li>• Well-being from nature</li> <li>• Cultural experiences</li> </ul>
3G travel and extended families	<ul style="list-style-type: none"> <li>• Services to fit all</li> <li>• Demand for range of activities</li> </ul>
Asian middle class	<ul style="list-style-type: none"> <li>• Uncertainty of the segment</li> <li>• Exotic accommodation with proper settings</li> <li>• Sauna experience</li> <li>• Potential from organised boat trips</li> </ul>

Figure 13: Consumer themes with sub-themes

**Social media behaviour of Gen Z:** The archipelago's appeal to generation Z is not certain, Nauvo might not attract young people enough. Generation Z does not belong to the main target groups in Nauvo either. Both indicating that the social media behaviour of this generation is quite irrelevant. Nevertheless, Gen Z with their social media behaviour and skills could have potential in destination marketing.

*"Ei nyt ehkä ole meidän kohderyhmä."* ("Maybe it is not quite our target group.")

**Experience-driven travellers:** Nauvo is seen to provide experiences through different events and markets that could also be developed further. Nauvo is an ideal place to seek well-being from the nature, both individually and more organised means. The destination could especially appeal to cultural tourists by providing memorable cultural experiences.

*"Tietysti osa haluaa vähän rauhallisempaa ja luontoa, hyvinvointia."* ("Of course some people want a bit more peaceful and nature, well-being.")

**3G travel and extended families:** The interview did not reveal the situation regarding 3G travel and holidays of extended families in Nauvo. However, it was noted that the segment requires services to fit all, and range of activities should be developed and provided.

*"Jotain vähän aktiveettityylistä vois olla vähän nuoremmille ja sit just sitä kulttuuritarjontaa vähän iäkkäämmille."* ("Something a bit like activity-type could be for younger and just that culture provision for elder people.")

**Asian middle class:** The Asian tourists are not the target group of Nauvo. The segment can be seen to be uncertain from two aspects: lack of information about the segment's expectations






















of the archipelago and segment being unactive during pandemics limiting the knowledge of their future movements. However, the trending exotic accommodation with the glass roof and proper settings could attract the segment to Nauvo. Sauna experience could also be provided and potential emerged from the organised boat trips.

*”Jos majoituspalveluja miettii, niin kylhän heille on eksoottista just vaikka nukkua sellasessa lasikattoisessa majoituksessa, missä on ihan kunnon sängyt ja vessat.” (“As far as thinking about the accommodation services, it is exotic for them to sleep for example in that kind of glass-roofed accommodation where there are proper beds and toilets.”)*

### 6.3 Scenarios

The selected changes to the Futures Table were: Price increase in gasoline, energy, and food; Domestic tourism; Uncertainty of travellers; Seamless customer experience; Cultural heritage; Demand for responsible practices; and Experience-driven travellers, respectively. The three development paths are marked with different coloured markings in the Futures Table: yellow as the first development path, red as the second, and blue as the third. Futures Table with all the variables and future’s state options are presented in the Figure 14.

The narrations in the scenarios describe the possible outcome of the changed world and people and how the tourism is operated in Nauvo in the given situation. Three different scenarios were formed from the created pathways: “Development enthusiasm and experience-oriented activities”, “Archipelago - The Wild West”, and “Nauvo - the authentic archipelago village”. The narratives are highlighted in blue background and after the development ideas to season-extension are presented.

CHANGE	PREFERABLE FUTURE	FUTURE TO BE AVOIDED	CURRENT SITUATION
Price increase in gasoline, energy and food	Balance between cost of living and income. Supported and resilient companies. People afford to travel but choose domestic travel to control their expenses. 	Decline in travelling. Domestic travel too expensive in Finland. Finns use savings for long distance travel if any. 	High price in gasoline declines the car and plane travel. But the high prices can be seen in every travelling options. People are prepared to cut of the expenses of travelling first. 
Domestic tourism	Restrained increase in demand. Investments in transportation and services. Companies enthusiastic in developing and serving. Domestic tourists pleased appealing to international markets too. 	Travelling exploded causing masses. Not enough services and the quality of them weakens. Cannot respond to the changing needs and expectations. People are disappointed and choose other destination.	Domestic travel popular. Appeal of archipelago is trusted. Nauvo's travellers mainly domestic ones. Demand peaks during summers in Nauvo, can be crowded.  
Uncertainty of travellers	People are not uncertain about the future. Decisions and plans are made. People trust in travelling and book trips in advance.  	People are uncertain. Plans are not made. People prefer to stay home. They do not spend, and priorities are changed. 	People are carefully optimistic in making plans. The uncertainty slowdown in decisions. Long-term plans difficult. Need for flexible options.
Seamless customer experience	Nauvo is reachable. The connections are seamless. All the information can be found from the same place, and it is clear and in real-time. It is possible to plan and prepare the journey. 	Customer experience is not seamless at all. Connections are worsened. The information provided is expired or even false. 	Customer experience not seamless. People are tired of trying to find the right information, that is limited and fragmented. Lack of real-time information as obstacle in planning the journey. 
Cultural heritage	Nauvo genuine archipelago village with community spirit. Locals enjoy themselves and are proud of their heritage. Local services are provided, and workforce is local. Travellers are appreciated by the local culture and want to support its preservation. The values are met by the locals and visitors which shows as authenticity. 	There is no localness available. Local entrepreneurs are disappeared. Cultural landscape is not being maintained. 	Localness emphasised and pulling factor. Environment radiates islanderness but Nauvo does not enough. Local operators are available, but lack of localness is seen in workforce. Peak times impairs the attractiveness and sense of community spirit. History of Nauvo is not transmitted to tourists, apart from Seili island. 
Demands for responsible practices	Localness and local production daily life. Demand increases. Companies motivated and tourists are willing to follow. Emission-free travel options popular. Certifications have helped in sustainable development and brings trust to tourists.  	Companies nor individuals do not care about responsibility. It is a last priority along with increase in costs. There are not localness or local production. Tourists are living like their last day. 	Promotion and attraction of localness. Possibility to recycle. Emission-free travel options considered in tourism development and marketing. Companies applied for certifications to become more sustainable and to attract visitors.
Experience-driven travellers	Interest increased towards experiences and service supply expanded and diversified. More job opportunities and experiences for locals. Community spirit as authentic experience. Local events popular and rooted. Nauvo provides peace and quietness.  	People's experience-driven attitude exploded, and only mass events are available. Nauvo cannot provide experiences. Overconstruction devastates natural environment, and it is not peaceful anymore. Localness has disappeared. 	Nature activities popular, i.e., biking and hiking. Companies developed services around experiences. Wellbeing of employees emphasised. Provision of themed trips and retreats. Accommodation as an experience. Interest in local life and events. Peace of nature attracts leisure travellers and remote workers.

Explanations:  1<sup>st</sup> Future Pathway  2<sup>nd</sup> Future Pathway  3<sup>rd</sup> Future Pathway

Figure 14: Futures Table

### 6.3.1 Scenario 1: “Development enthusiasm and experience-oriented activities”

*The restrained growth of green and experience-oriented domestic travel demands for islanderness and reachability of development enthusiastic companies*

“The increased cost of living and financial situation has obtained balance, both in business and private life. The companies have got financial support and their resilience has increased. People afford to travel but to control their own expenses they often choose a domestic destination.

Domestic tourism has increased with restraint, and it has been responded. Investments in transportation have been made and services in Nauvo has been diversified. Companies have development and service enthusiasm. Domestic travellers are interested in Nauvo, and it also appeals to international tourists.

People are not insecure anymore. They trust in future and safety of travelling. They have the courage to travel and make long-term plans as well as book trips well in advance.

There has not been enough time to invest in seamless customer experience of Nauvo’s reachability. The information about the archipelagos’ services is limited and fragmented all around. Travellers need to put unnecessary effort to gain the information and they do not have possibility to properly prepare and influence their journey due to the lack of real-time information.

Nauvo’s culture heritage is being appreciated and it is seen as a pulling factor. The archipelagic environment is an experience as such, but the islanderness of Nauvo does not transmit enough. Tourists do not know much about Nauvo’s history, apart from the island of Seili. There are local operators, and they are also on display in different events, but the services are experiencing shortage of local workforce. The harbour area of Nauvo attracts with its atmosphere but the sense of community spirit disappears during the peak periods.

Responsibility has become everyday life. The eco-friendly companies have increased popularity. The companies are motivated to make responsible choices and convince travellers to do the same. The certifications support the companies’ sustainable development while increasing the trust and appreciation of travellers. The emission-free travel options have increased popularity. The local production is appreciated, and local products are available for the travellers in Nauvo.

The interest towards experience-oriented travel has increased and the supply of services has expanded in form of new businesses providing more options for travellers. The locals have received new job opportunities and can enjoy themselves from the experiences. The spirit of community and cooperation has grown along with the joint-making and brainstorming. The spirit of community can be seen as authenticity by the travellers which attracts them. The popularity of local events has increased and become established. Nauvo still provides peace and quietness for them who are looking for it.”

#### **Development ideas for season-extension**

Management should be done together with the stakeholders with frequent meetings emphasising local cooperation, co-creation and information sharing. Tourism planning and

marketing requires co-created marketing plan of municipality and local community to develop a year-round archipelago brand. Seasonal calendar is needed helping in planning of activities and experiences that Nauvo could offer in different time of the year. Good marketing to the target groups based on careful planning to attract them outside season. The skilled workforce should be encouraged to come to the archipelago. Jobs need to be attractive by providing good salary, reasonable working hours and long-term contracts and developing the local activities and events. The sharing economy could be useful to distribute labour and services to the local small entrepreneurs. The services could be bought from the locals so that there would not be need for doing and owning everything.

The supply of services is developed more from the perspective of organised tours, events and remote working. The organised tours could be developed year-round around bird watching, forest walks, campfire trips, gastronomy tours, experiences with animals, and experiences in quietness and darkness, during autumn around the autumn foliage, and berry and mushroom picking, and during winters around snowshoeing, moonlight skiing, ice skating, winter kayaking, and ice fishing. The events could be organised based on the seasons, such as providing autumn markets. There could be also days for small entrepreneurs where local products are displayed during the tours. The services could be developed more around the remote workers, so that the services are available throughout the year and targeted to their needs.

The seamless customer experience and reachability of archipelago is done by improving the connections outside the season and developing digital solutions. There should be a platform for the information that is clear and comprehensive. Visitors can find all the needed information before and during the journey and get hints about Nauvo's offerings. The traffic at the ferry ports is tracked providing real-time information to the travellers enabling decentralisation of travellers outside the high season. The low emission travelling options should be emphasised and services developed more to attract visitors using bikes. The carpooling could be also used to reach the islands.

### 6.3.2 Scenario 2: "Archipelago - The Wild West"

*The financial distress divides the mankind in two leaving the archipelago as a trash of rich people*

"The cost of living has increased unbearable, and the economy has collapsed. People do not have afford to travel anymore and especially domestic travel is too expensive in Finland. Most of the Finns prefer to use their savings to long distance travel if to any.

The visitors in Nauvo still constitutes mainly from domestic travellers. The archipelago attracts the wealthy domestic tourists, that fill Nauvo during the holiday season affecting traffic.

People are uncertain about the future and do not dare to make plans. The mainstream saves their expenses by staying home. People have learned to settle for less while their priorities have been in other things than in travel.

The reachability of the archipelago has worsened, and the seamless customer experience is irrelevant. The connections have been reduced and the information available is expired or even false.

The cultural heritage of Nauvo is not being appreciated and the localness is not being available. All the local operators have disappeared along with the increased costs and are replaced by the large-scale enterprises. The cultural landscape is being changed due to the lack of maintenance.

Both the companies and people do not care about the responsible practices. Price being too high the responsibility is the last in everybody's priority list. Travellers feel like living their last day.

Travellers' experience-driven attitude has grown that big that there are only mass events available instead of individual experiences. Due to the lack of interest Nauvo does not develop new experience-oriented services. All the natural elements have been disappeared along with to the overconstruction and Nauvo cannot provide calm environment anymore.”

#### **Development ideas for season-extension**

Destination should be managed based on the tourism strategy that is created together with the public sector and local community and with the targets being followed regularly. The archipelagic brand of Nauvo should be emphasised in marketing requiring the decision how to be displayed in the marketplace and what kind of services provide. The nature with the experiences provided by it, such as quietness, darkness, tranquillity, well-being, and the exoticism of autumn and winter should be at the core for marketing.

The idea of Nauvo is promoted to the people who have left the domestic travelling to offer an image into their minds-eye. This could be done by filming the surroundings in interesting way. Local operators could be participated in marketing to gain visibility and to share the resources and costs. Special target group could be the former visitors of Nauvo whose contact details have been collected. Customer satisfaction study could be done for the former visitors to explore Nauvo's previous pulling factors and before the price increase and what are the subjects limiting the visitation nowadays.

Reachability of archipelago should be enhanced, and the pricing should be considered. Outside the seasons the tourism services could be cheaper providing possibilities for impoverished people. Travellers could have an option to accommodate or eat in a restaurant in exchange for work or little tasks. The ferry-use should remain free of charge and the affordable means of transport should be provided. People should arrive with public transportation and continue their journey by bikes. Bikes could be rented by the archipelago

and information provided about the routes with the pickup, drop-off, and maintenance points. Also, the carpool option could be useful.

Supply of services should be reconsidered. Do-good holidays and cleaning events could be provided together with local operators, environmental organisations, and voluntary work to protect and promote Nauvo's nature. The campaigns could be finished with events where the locals could display islanderness with its traditions. Nauvo could tap into the company outings and remote workers as well as artist communities searching for residency. The inexpensive activities outside the season could be traditional sauna, stargazing, open-air sleeping, tour skating and ice swimming. The courses around the local handicrafts and traditional work could be organised. The luxury travel with high quality accommodation, dining, and experiences is provided outside the season to prevent the congestion of wealthy travellers during summer. The glass iglus could attract the rich people to visit Nauvo during the autumn darkness.

### 6.3.3 Scenario 3: “Nauvo - the authentic archipelago village”

*Reachable self-sufficient authentic island draws for trustful travellers*

“The financial costs have stayed high. The high price of gasoline has decreased car and plane travelling, but the price of energy and overall expenses being also high all the travel options are expensive. People do not afford to travel so much, and they are prepared to cut off from the travelling expenses first.

The domestic travel still attracts, and people are willing to spend holidays at the archipelago. During the holiday season people want to escape to Nauvo causing the peaks in demand.

People are not uncertain about the future, but they trust that things are being worked out. They trust in safety of travel and would be willing to travel in allowance of financial situation. They dare to make long-term plans and book trips when there are flexible options.

Nauvo is easy to reach. The connections are seamless influencing positively to the customer experience. Travellers can plan their journey and prepare to it better. They can trust that all the necessary information about the destination and its reachability are being available clearly from the same place.

Nauvo is a genuine archipelago village, whose cultural heritage is being appreciated. The locals enjoy themselves on their roots and are proud of their heritage. The local services are available, and the locals enjoy themselves working in there. The spirit of communality can be seen in every activity. Travellers are attracted in the archipelagic culture of Nauvo that is being taken good care and wants to give support to its preservation. The values of locals and tourists are being met which influences in the island's authentic appeal.

Responsibility has become daily life and it has rooted into the society from every dimension of sustainability. The local production is everyday life due to the high price of logistics. Companies take responsibility into account in every operation, and it is a requirement of the travellers who want to act

in accordance with their values. The certification programs have helped the companies to achieve all the sustainability dimensions and travellers can fully trust in the companies' values.

Travellers are experience-driven, and service offered in Nauvo has expanded and diversified in the form of small-scale businesses. Nauvo is united cooperative community, whose self-sufficiency brings the livelihood and experiences to its residents. The experience of Nauvo is in its authenticity, locality, and community spirit. The local events are being established in the daily life which attracts the travellers. The prospering nature of Nauvo provides the peace and quietness for everybody longing for it. “

### **Development ideas for season-extension**

The continuity of strong cooperation in management it should be taken care of and use foresight in developing the services. Travellers should be involved in planning and their opinions be respected. Marketing should be targeted for different tourist segments interested in the exoticism of winter and autumn.

Digital platform for Nauvo's services should be actively maintained and high-quality content creation provided, also in the other channels. Local operators could develop live stream for tourists having possibility to get to know to the area with its community and their daily lives for example in business operations during and outside the season.

The community spirit could be emphasised in supply of services. There could be "archipelagic days" where one could live like in the olden days at the archipelago. Packages around experiences could be provided, such as "Day in the archipelago" including visitation to a local home, where dinner is prepared and enjoyed along with telling stories. There could be tours or walks to local producers with food samples as well as campfire trips with storytelling. For outbound tourists "living like a local" products could be provided. Visitors could have the opportunity to work for local operator for example by participating in agricultural work or production of local goods. The provided activities could be fishing, handicraft workshops, baking and preparing traditional food, traditional sauna, northern light spotting, and live music with dancing.

## **7 Conclusions**

The assignment for this thesis was given by the VISIT project. The purpose of the research was to be predictive examining the changes in macro-environment and it was concentrated in the island destination of Nauvo in the Finnish Archipelago. The impacts of COVID-19 pandemics to the industry were also commissioned to examine. The objective of the thesis was to gain insight of the future island tourism and to find development ideas for season-extension.



Islands are popular tourism destinations (Carlsen & Butler 2011, Chapter 1 & 231). Island destinations are characterised by physical separation, cultural difference, attractive climate and environment, and political autonomy (Baldacchino 2015, 1-4 referring to Butler). Destination management connects all the separate elements of a destination and manage the complexity with a strategic approach aiming to achieve a competitive and sustainable destination. (UNWTO 2020.)

Sustainable tourism is a form of tourism that is developed and practiced in a way that it stays viable (Zahedi 2004, 154 referring Butler) balancing between the economic benefits and the negative socio-ecological impacts of the industry (CBI 2019). Coastal and maritime tourism is highly seasonal (ECORYS 2013, 32-37) and island destinations are extremely dependent on tourism (Carlsen & Butler 2011, Chapters 1 & 17). As islands are often small and isolated, their resources, population, activities, and career opportunities are limited as well as they might be difficult and expensive to reach (ESPON 2013, 9-10). In addition, islands are especially vulnerable to the external changes (Carlsen & Butler 2011, Chapter 17).

Marketing is essential for a destination for tourists to know it is worth visiting. Destination management need to maintain and enhance the elements of a destination to meet the expectations. The value is created by fulfilling tourists' experiential and aesthetic needs. (Howie 2003, 101-102 & 141-153.) To fulfil the visitor-experience, it is essential to understand the operational environment (Uysal et al. 2011, Para 7) as well as the tourist behaviour and the travel motivation. It is important to look forward and add insight of the changes in tourism and in the society. (Pearce 2011, Para 3).

The examination of change is necessary to anticipate the future. There are different types of changes. (Hiltunen 2013, 3-9, 25-41, 175.) Trends are patterns inviting people to embrace new ways of doing things or express themselves. (Raymond 2010, 13-15, 34) Megatrends are profound social, economic, environmental, and technological drivers of global change. (Hajkowicz 2015, 3 & 14) Weak signals are the first signs of an emerging issue or small event indicating the possible change. (Hiltunen 2010, 3-10, 74, 99 & 104) Wild cards are sudden and unexpected events (Heinonen & Ruotsalainen 2017, 283) that affects dramatically the whole globe. (Heinonen et.al. 2017, 301.)

The first question for the research problem aimed to find answer to how the tourism in Nauvo looks like in the future. The results of the research described and analysed different changes that are impacting the tourism in Nauvo. Nauvo is likely to be a popular domestic summer destination, that appeals to nature tourists who are travelling by car or bicycle. It provides good environment for activities in nature, and cultural and historic sights. Local events and markets are provided. Visitors are mostly from older generations. It appeals to individual tourists and groups in educational purposes. During summertime there might be overcrowding

in some places affecting the visitor experience. Tourism is operated in quite traditional means, but the companies are responsible by following regulations and guidelines. There are some problems with finding skilled workforce due to the seasonal and temporary work. The roads and cycling lanes are in good shape and capacity is enhanced, but the prices for the journey and services are higher. Remote work from archipelago is popular, but the tourism industry in Nauvo is dependent on time and place. Nauvo has efforts in season-extension and due to the climate warming the summer season might be longer.

The second question for the research problems aimed to answer to what kind of possibilities there are for season-extension. The results were described by giving development ideas that emerged during the scenario workshop. Development ideas for season-extension concerned the development of year-round archipelago brand and experiences around seasons, marketing, seamless customer experience, new services, and packages around archipelagic life.

The wild card event of COVID-19 and its impacts was commissioned to study more. The pandemic has had major impact on the society as well as for Nauvo's tourism industry. Political decisions made during the pandemic with the travel restrictions and health security has decreased travelling globally causing uncertainty towards travelling. In Nauvo, the unexpected positive consequences can be seen with the improved hygiene measures and increased domestic travel. Nauvo being a domestic summer destination was lucky not being suffered from restrictions and economic loss, but it should be prepared for future events. Domestic tourism demand has caused overcrowding in some places around Nauvo, especially in ferry ports, but in turn the nature tourism has increased with biking being popular. The capacity of accommodation and transportation has been adjusted and the concept of overtourism has been brought up. Remote work in Nauvo have been popular providing new income outside the season.

For Nauvo becoming a sustainable tourism destination some actions are suggested. The measurements concerning carbon neutrality and waste reduction should be adopted by the tourism SME's soon as there are certain time limits for them. To attract skilled workforce the seasonality problems should be tackled for example by using the potential of gig-economy, providing functioning living environment, developing free-time activities, and emphasising the attractiveness of working environment. Nauvo should strengthen its cultural and historic heritage. The intangible cultural heritage should be emphasised with the elements of islanderness and community spirit. More seamless customer experience should be provided with real-time information. It should protect its natural heritage and raise awareness among the visitors and prevent the marine pollution involving all the stakeholders. It should provide all-weather activities around the year as well as experiences and events around nature and culture. It should familiarise itself with Visit Finland's thematic approach for inbound tourism.

providing possibilities outside seasons as well as consider the potential of generation Z and Asian travellers.

As the group interview according to the plan could not be organised and there were limited number of participants in the individual interviews, the overall picture of the future tourism industry of Nauvo, common understanding about the situation and weak signal detection could not be fully achieved. As the data collection was broad and there was too much information to handle, the research went off the limits. The time limitations and pressure caused problems towards the full analysis and the research report. However, the results are clear and comprehensive. They are valuable for the project, its partners, and associates as well as for other destinations and tourism businesses in Finland. The research can help businesses to think about possible futures with different outcomes and prepare for them, giving a competitive advantage. It also gives some development ideas for season-extension.

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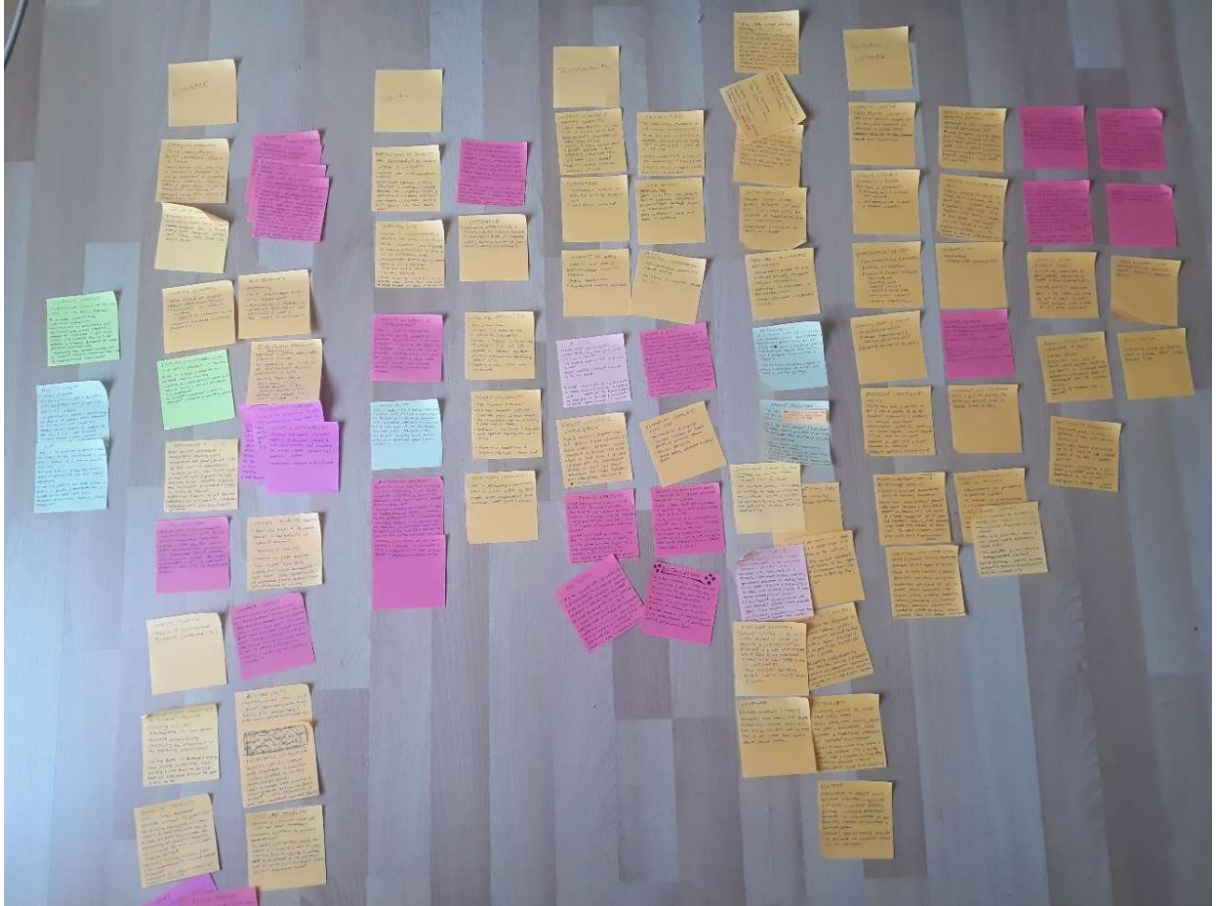


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### Appendix 1: Data Collection in Environmental Scanning

Post it -note phase:



Excel Table phase:

A	B	C	D	E	F	G	
<b>Technological changes</b>							
1	Digital channels shape sector (11)	challenge and opportunity due to globalisation, digitalisation and global platform economy -> enable Finnish destination to compete with others (11)	digital reform of tourism sector needs understanding of digitalisation and competence development (11)	Digitalisation must be acknowledged in product development, marketing and sales (25)			
2	Digital buyability, findability and discoverability of tourism sector and use of digital solutions in tourism products and services must be developed (11)	digital accessibility: online presence and functionality of services (11)	appropriate distribution channels (11)	updatibility of info, equality of services among different target groups and improved cost-effectiveness (11)	solutions: experientiality and communication (11)		
3	offer opportunities for tourism to provide connected, personalised and integrated customer experiences (1)	ability to better understand and predict outcomes -> new strategies and business plans (1)	big data skills needed (1)	sensors capture enormous amounts of info (1)	AI create many opportunities for understanding and analysing and analysing tourism services and tourists (11)		
4	exploring destination through location-based immersive content (1)	audio narration (1)	augmented reality features (1)	VR produce alternatives to physical travel (11)			
5	mobile devices, digital channels, online travel agencies and meta search engines enable travellers to access info anywhere in real time and to have control over the subsequent phases of their holidays (2)	travellers can make holidays more affordable, efficient and accessible (2)	To enhance: personalise and engage, increase number of touchpoints and enhance them, online presence, track online behaviour and collect data (2)	Digital innovations bring solutions to travel chains and response to customer needs in future, as the functionality of transport connections and smoothness of travel chains crucial in tourism (11)			
6	data collection via smart devices enables consumer empowerment through access to information (1)	more customers seek out data in advance (1)	<b>Interaction (9)</b>	can take place remotely or via virtual environment (9)	use of digital technology in services and human interactions already part of daily life. Next VR and AR (9)	growing use of applications, algorithms us (9)	
7	Discomfort that bots and humans could become hard to tell apart -> 1/3 would avoid contacting companies that use intelligent bots for customer service (1)	want to be treated like a person, not a number (1)	digital detox (1)	Increasing group of tourists want to escape their complex digital life (2)	High-quality tourist services still require interaction between people (12)		
8	<b>Relationship between consumer and technology (1)</b>						
	Political	Economic	Social	<b>Technological</b>	Environmental	Cultural	Sources

## Appendix 2: Interview questions in Finnish and translations

### POLIITTISET MUUTOKSET

1. Miten poliittiset päätökset pandemian aikana ovat vaikuttaneet tulevaisuuden matkailuun Nauvossa?
  - a. Matkustusrajoitukset
  - b. Terveysturvallisuus
2. Miten Ukrainan sota ja muut poliittiset epävakaudet Euroopassa vaikuttavat Nauvon matkailuun tulevaisuudessa?
  - a. Miten Suomen imago turvallisena matkailumaana näyttäytyy Nauvossa tulevaisuudessa?
3. Miten ympäristöpoliittiset rajoitukset vaikuttavat Nauvon matkailutoimialaan tulevaisuudessa?
  - a. Miten rajoituksia ja muita toimia mitataan?

### TALOUDELLISET MUUTOKSET

1. Miten kasvava jakamistalous muovaa Nauvon matkailua tulevaisuudessa?
2. Miten vaikeaa Nauvon on löytää ammattitaitoista työvoimaa tulevaisuudessa?
  - a. Miten Nauvossa panostetaan työntekijöihin tulevaisuudessa?
3. Miten kotimaan matkailu näkyy Nauvossa tulevaisuudessa?
  - a. Miten siihen investoidaan?
4. Miten kasvava luontomatkailun kysyntä vaikuttaa Nauvossa tulevaisuudessa?
5. Miten Visit Finlandin pyrkimys kasvattaa kansainvälistä kysyntää kesäkauden ulkopuolella teemapohjaisella tuotteistamisella vaikuttaa Nauvon matkailuun?
  - a. Mitkä teemat ovat erityinen merkittäviä Nauvon matkailun kehittämisessä?

### SOSIAALISET MUUTOKSET

1. Miten työelämän muutokset vaikuttavat matkailun toimialaan Nauvossa tulevaisuudessa?
  - a. Miten matkailuala voisi vastata työntekijöiden arvoihin tulevaisuudessa?
  - b. Miten iäkkäät työntekijät huomioidaan työmarkkinoilla tulevaisuudessa?
2. Miten esteettömyysvaatimukset vaikuttavat Nauvon matkailun kehittämiseen tulevaisuudessa?
3. Miten liikamatkailu vaikuttaa muihin turisteihin ja paikallisiin Nauvossa tulevaisuudessa?
  - a. Miten Nauvo ennaltaehkäisee matkailumäärän nousun negatiivisia vaikutuksia tulevaisuudessa?
4. Millä keinoin Nauvo aikoo kommunikoida kulttuuriperimäänsä tulevaisuudessa?
  - a. Mikä on Nauvon aineeton kulttuuriperimä ja miten se erottuu muista saariston saarista tulevaisuudessa?

### TEKNOLOGISET MUUTOKSET

1. Miten rata- ja tieyhteyksien parantamisyhtymykset vaikuttaa Nauvon tulevaisuuden matkailuun?
  - a. Millä keinoin Nauvon matkailijoiden asiakaskokemus saadaan saumattomammaksi tulevaisuudessa?
2. Minkälaisia digitaalisia innovaatioita Nauvon matkailuntarjoajilla on ollut pandemian aikaan ja miten ne vaikuttavat tulevaisuuden matkailutoimintaan?
3. Minkälaisia mahdollisuuksia Nauvo tarjoaa etätyöntekijöille tulevaisuudessa?
4. Miten digitaalisuutta ja erilaisia digitaalisia sovelluksia (AI, AR, VR) käytetään Nauvon matkailun kehittämisessä tulevaisuudessa?

## YMPÄRISTÖLLISET MUUTOKSET

1. Miten muuttuva ilmasto vaikuttaa Nauvon ympärivuotiseen matkailuun tulevaisuudessa?
2. Millä keinoin Nauvo aikoo kunnioittaa luontoaan ja suojella luonnonvarojaan tulevaisuudessa?
3. Miten merien saastuminen vaikuttaa Nauvon matkailuun tulevaisuudessa?
  - a. Miten matkailusektori tulee suojelemaan Itämeriä tulevaisuudessa?
4. Minkälaisia vastuullisia toimintoja Nauvon matkailutoimialalla on tulevaisuudessa ja kuinka sitä viestitään?
  - a. Miten kasvava kysyntä sertifioiduille vaikuttaa toimialaan tulevaisuudessa?

## KULUTTAJAMUUTOKSET

1. Miten G-sukupolven sosiaalisen median käyttäytyminen vaikuttaa Nauvon matkailuun tulevaisuudessa?
2. Minkälaisia elämyksiä Nauvo tarjoaa tulevaisuudessa?
  - a. Miten rauhallisuudentarve vaikuttaa Nauvon matkailutarjontaan tulevaisuudessa?
3. Miten 3G-matkailijat huomioidaan Nauvossa tulevaisuudessa?
  - a. Minkälaisia palveluita heille tarjotaan tulevaisuudessa?
4. Miten kasvava Aasian keskiluokka vaikuttaa Nauvon matkailuun tulevaisuudessa?
  - a. Minkälaisia korkealuokkaisia palveluita on tarjolla tälle asiakasryhmälle tulevaisuudessa?

English translations:

Political changes:

1. How the political decisions concerning COVID-19 pandemics have affected the future's tourism in Nauvo?
  - a. Travel restrictions
  - b. Health security measures
2. How will the Russia-Ukraine war impact on the tourism in Nauvo?
  - a. How the image of Finland as a safe tourism destination will be showing in Nauvo in the future?
3. How the environmental policies with their restrictions and reduction plans are affecting the tourism industry in Nauvo in the future?
  - a. How they will be measured?

Economic changes:

1. How is the increased sharing economy shaping the Nauvo's tourism in the future?
2. How hard it is to find skilled workforce in Nauvo in the future?
  - a. How Nauvo will be investing in the workforce in the future?
3. How will the domestic tourism be showing in Nauvo in the future?
  - a. How it will be invested?
4. How the increased demand for nature tourism is affecting Nauvo in the future?
  - a. How the Visit Finland's aim for growing international demand outside the summer season with theme-based marketing will be affecting the tourism in Nauvo and which themes are especially useful?

Social changes:

5. How is the changing working life affecting the tourism industry in Nauvo in the future?
  - a. How the values of the employees could be met by the industry in the future?
  - b. How the senior employees are considered in the labour market in the future?
6. How are the increasing number of people with disabilities affecting Nauvo's tourism development?
7. How the overtourism is affecting the tourists and locals in Nauvo in the future?
  - a. How Nauvo will prevent the negative impacts of increased tourist flows in the future?
8. With what measures Nauvo is going to communicate its cultural heritage in the future?
  - a. What is the intangible heritage of Nauvo and how it will distinguish from the other islands in the archipelago in the future?

Technological changes:

5. How the improvement for road and rail connections will be affected the tourism in Nauvo in the future?
  - a. With what measures the more seamless customer experience will be achieved for travellers to Nauvo in the future?
6. During the pandemics, what kind of digital innovations there have been among tourism providers in Nauvo and how they will be affecting the future's tourism business?
7. What kind of possibilities Nauvo has for remote workers in the future?
8. How the digitality and digital applications (big data, AR, VR) will be used in tourism development of Nauvo in the future?

Environmental changes:

5. How is the changing climate affecting the year-round tourism in Nauvo in the future?
6. With what measures Nauvo will be respected its nature and conserved its natural resources in the future?
7. How is the marine pollution affecting the tourism in Nauvo in the future?
  - a. How the Baltic Sea will be protected by the tourism industry?
8. What kind of responsible measures the tourism industry in Nauvo is having in the future and how it will be communicated?
  - a. How the increased demand for certifications is impacting the industry in the future?

Consumer changes:

5. How is the social media behaviour of Gen Z noticed by the tourism industry in Nauvo in the future?
6. What kind of experiences Nauvo is providing in the future?
  - a. How the need for tranquillity is affecting the supply of tourism services in the future?
7. How the 3G travel and extended families are considered by the industry in the future?
  - a. What kind of services there will be in the future?
8. How is the growing Asian middle class affecting the tourism in Nauvo in the future?
  - a. What kind of premium services there will be in the future?