



A Future Analysis of Arkösund archipelago

THE ROAD TOWARDS A SUSTAINABLE PLACE 2030

APRIL 2020



THE FUTURE FOR ARKÖSUND ARCHIPELAGO

Arkösund, located in the archipelago of Östergötland, is a beautiful area with a unique and protected nature that is held in high regard by locals, visitors, and seasonal residents alike. The region and its municipalities have long strived for sustainable development of the area. This implies that the protection of nature and wildlife is taken into consideration while also trying to balance the human resident's wishes and needs. The tourism industry becomes a critical component and a catalysator for bringing better service, more work prospects, and more income to the area. Through interviews with representatives for Arkösund and Östergötland, we found that there is a lot of passion and commitment to further develop the area. There are also different interests and perceptions of Arkösund. While both permanent and seasonal residents long for a tranquil and peaceful archipelago, they also want more service and activities. The contextual analysis indicates that there is a growing interest of being in nature alongside a growing interest to live near the countryside. In the present thought-based economy, where competitiveness is dependent on creativity and intelligence, the evidence is pointing towards that spending time in nature positively affects your brain and capacity for thinking. The archipelago has a lot to gain by identifying different interest groups that are longing for nature and tranquility in their spare time.

The future of the archipelago is determined by several different factors – some of which are uncertain. In this analysis these uncertainties are explored as different possible futures towards 2030.

We investigate what would happen if:

- The number of visitors would either dramatically decline or increase by 2030
- Entrepreneurs dare to invest
- Revenue is received from investments in the area,
- Everyone involved came together in order to strategically develop the area towards the future.

We provide some final recommendations towards 2030 in order to create a common perception of what needs to be done in order to develop Arkesund in the right sustainable direction. At the same time we make sure to take the beautiful surroundings and the wishes of the inhabitants into consideration.

TABLE OF CONTENTS

THE FUTURE FOR ARKÖSUND ARCHIPELAGO	2
AN ANALYSIS TOWARDS 2030	4
THE ÖSTERGÖTLAND ARCHIPELAGO – A PRIORITIZED AREA	5
TRENDS IN THE CONTEXTUAL ENVIRONMENT	9
THE DEVELOPMENT OF ARKÖSUND ARCHIPELAGO TOWARDS 2030	14
WHAT IF... AN INCREASED AMOUNT OF LOCAL COMPANIES HAVE THE POSSIBILITY AND COURAGE TO INVEST IN LONGER OPENING HOURS AND NEW SERVICES/PRODUCTS	15
WHAT IF... A LARGE EXTERNAL INVESTMENT IN A VISITOR ATTRACTION THAT BRINGS 100 000 VISITORS A YEAR	17
WHAT IF...THE NUMBER OF PEOPLE IN THE AREA DRAMATICALLY DECREASE (50% FEWER RESIDENTS AND VISITORS THAN 2020)	18
WHAT IF... THE NUMBER OF INDIVIDUALS THAT WANT TO RESIDE OR VISIT THE AREA INCREASES BY 100%.....	19
WHAT IF...A STRATEGIC DESTINATION DEVELOPMENT WITH A FOCUS ON JUNCTIONS OCCUR	20
RECOMMENDATIONS	22
ABOUT KAIROS FUTURE	23
APPENDIX 1: MAP OVER ARKÖSUND ARCHIPELAGO.....	24
APPENDIX 2: A METHOD FOR SCENARIO ANALYSIS	25
APPENDIX 3: THE INTERNATIONAL OUTDOOR TRIBE	26
APPENDIX 4: CHART OF INTERESTS	27
REFERENCES	28

AN ANALYSIS TOWARDS 2030

This analysis was conducted by the request of Norrköping municipality within the project Cost4us. The overall purpose of the report is to identify development potentials for Arkesund archipelago as well as to highlight potential futures for sustainable development. This will, in turn, create better preconditions and possibilities for sustainable development of the area towards 2030. Please see appendix 1 for a map of the geographical area of Arkösund archipelago.

The definition of sustainable development in this report is taken from the UN-report “Our Common Future,” written at the end of the 1980s.¹

”Sustainable development is the development that meets the needs of the present without compromising the ability of future generations to meet their own needs.”

The concept accommodates three dimensions: Ecological (as in protecting and sustaining natural areas and minimizing negative impacts on ecosystems), Social (as in monitoring human rights and good health), and Economic sustainability (by a fair allocation of recourses as well as facilitation of sustainable consumption). When these three components are in place and uphold one another, the result is sustainable development. As the 2030 UN global sustainable development goals (SDGs) includes these three aspects of sustainable development, they need to be taken into consideration when you are working continously with development.²

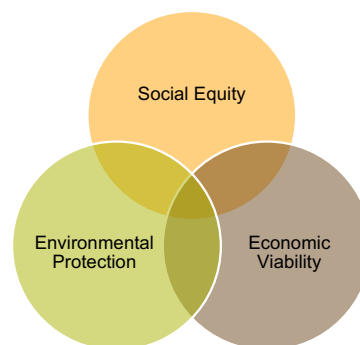


Figure 1: The three dimensions that have to coordinate in order to generate sustainable development.

The Archipelago is a popular destination for **visitors**, defined in this report from a broad perspective. We define visitors as those who visit friends and relatives, visitors from the surrounding area, as well as regular tourists. Tourists are defined by the definition of tourism, namely as those engaging in human activities while traveling, or those at a particular location away from their registered address and its adjacent area for a shorter period than a year.

PROCESS & METHOD

In this report, we present alternative future scenarios for the development of the archipelago that provide an overview over possible as well as probable futures. Finally, we present recommendations for future prioritizations. The final result of this report can be used as a basis for further development projects within the archipelago. The process of this report was planned from somewhat limited resources, and the method was therefore chosen to accommodate full efficiency whilst at the same time taking the circumstances into consideration. The method derives from interviews with eleven public as well as private figures involved in the development of the Östergötland archipelago, analyzing earlier documentation and common strategies as well as a brief trend analysis. All undertaken during some intensive weeks by Kairos Futures own future strategists.

Based on the research, we have conceptualized alternative future scenarios for the archipelagos of Östergötland and Arkösund towards the year 2030. Please see appendix 2 to read a more in-depth description of Kairos Futures processes.

We continue with the presentation of the results from the brief analysis of the present development of the archipelago.

THE ÖSTERGÖTLAND ARCHIPELAGO – A PRIORITIZED AREA

In this chapter, we present a summary of the results from the interviews that were undertaken in order to understand the ongoing development. The interviewees are all working with development in some shape or form (tourism, preservation of nature, development plans for construction, business development) within the county administration as well as the municipalities within the archipelago of Östergötland.³

There have been several development programs and projects for the Östergötland archipelago since the 1970s. Some of them took a considerable amount of time to implement; others remain to this day. A joint development project for the coast and archipelago of Östergötland and Småland has been ordained by the public actors in the area (municipal, regional, county administrative and regional board level). In this project several long-term sustainable solutions towards 2030 has been identified. The joint development program will form a basis for a more coherent and guiding action program used for undertaking planning and development in coastal regions,⁴ the vision therein states:

“The long-term goal of the program is a coast and archipelago that, through its unique characteristics, is an attractive location for accommodations, enterprises, and recreation. The coast and archipelago are attractive parts of the region and should, therefore, be accessible to everyone.”

There is an evident prioritization of the area, and several platforms for cooperation exist at both the regional, municipal, and local level in the form of projects such as Cost4us.⁵

Due to climate changes, toxic spill, and eutrophication processes, the natural balance in the archipelago has changed during recent years. In the Baltic sea both wildlife, bird and fish stocks have dramatically changed. The stock of predatory fish has diminished, which has led to an imbalance in local ecosystems as other species that previously was hunted by such specimens are flourishing. However, large parts of the local fauna and flora are protected, which contributes to the popularity of the area amongst visitors, permanent and part-time residents alike. The permanent residents often work within agriculture, craft services, and the tourism industry. Today, agriculture is an essential component of the visual appearance of the local archipelago. The Archipelago has challenges concerning its base population, which is necessary for public services. This creates challenges for the every-day life for some groups, such as families with children living in the archipelago.

Several actors within the tourism industry, for example kayak leasing companies, have during recent years developed products directed towards the international market. Marine traffic has increased during the summer with a rising number of boat tours. As the area is a popular summer destination as well as for part-time residents, the prices on properties and land tax is getting inflated. The tourist season is about six weeks in the summer, and during this time the entire area comes to life. When the season is over, available offers of services and products diminish, and marine traffic decrease.

The three interest groups – permanent and part-time residents and visitors – all have their own interest in the archipelago, which sometimes collide.

WHAT ATTRACTS RESIDENTS AND VISITORS TO THE ARCHIPELAGO?

According to the interviews the following image of the archipelagos qualities where presented:

- A unique environment & lifestyle
- A genuine local culture
- The natural surroundings
- Sunbathing & swimming
- A relatively unexploited archipelago
- Close to adjacent urban areas)

CHALLENGES REGARDING THE DEVELOPMENT OF ARKÖSUND ARCHIPELAGO TODAY

Today, a major challenge for the archipelago is the aging population, which affects the provision of public services. The characteristics of the archipelago's natural environment alter, following lesser amounts of agriculture on the islands. Housing-

prices and land tax values have also escalated since the area is popular amongst part-time residents. The many protected areas also stagnate development and activities within the natural reserve coastline.

Concerning infrastructure, there are several challenges ahead, both in terms of logistic chains and marine traffic in the off-season, but also the digital infrastructure. There are still areas with bad reception for phone-traffic and internet, which creates difficulties for entrepreneurs to receive payment when they charge for their services using online platforms.

Conflicts of interest between permanent and part-time residents, as well as visitors, contribute to other challenges. The calmness of the area needs to be balanced against the increasing number of people who move to and consume in the area (who therefore constitute a basis for service), which implies further challenges ahead. Many residents in the archipelago are passionate about the area, and therefore has to be included in further development work.

Today, there are no exact statistics on the number of residents in the area during different periods and no information on how they move within the area. This complicates working with estimations, prognoses, and future development. However, the measurement of cell-phone signals through mobile telecommunications companies is underway.

Another challenge is to spread information concerning “what not to do” when visiting the archipelago in order to minimize littering and the risk of fires on the islands. Future sustainable development also encompasses that local consumption revenues stays in the locality.

Prolonging the short summer season and creating additional seasons during the year are challenges that the archipelago have in common with most other destinations. Current actors have limited possibilities to offer services and products “off-season”, leading up to there being no sustainable number of visitors to base extended opening hours on for more than a week after the season finishes. Catch 22! Another challenge for the local tourism industry concerns the recruitment of personnel since few can or have the will to settle in or commute to/ the archipelago.

The development today is mainly based on the devotion of a smaller number of individuals, and most often in the form of projects. Another challenge, therefore, is to create developments that endure over time.

FUTURE POSSIBILITIES

In the interviews conducted within the project, several possibilities for the area were discussed. There is a consensus regarding the potential for the tourism industry in the archipelago to attract more visitors, all year round, and generating more revenue by further developing the archipelago sustainably. The local tourism industry creates synergy effects, as its positive impact on rural development is

making the area an attractive place to live. Outdoor experiences are considered to have the greatest potential, due to its calm nature. A unique tranquility can be found in the archipelago. However, the destination need to offer more unique experiences in order to differentiate itself from other destinations, for example by creating unique accommodations (much like Tree Hotel located close to Boden⁶). Exclusive products or services can generate good revenue for the destination if visitors are willing to pay for it.

In order to manage the balance between preservation of nature and the people spending time in the archipelago in the future, a possible strategy could be to provide suggested routes to the boat- and kayak owners, where they can use public bathrooms and public grills along the way. These locations can also be further expanded into small destinations with accommodation and dining options. Hikers can also be regulated using public transport and marine traffic. If the customer base would diminish at some point during the year, an option is to automatize some parts of the local services, such as a local grocery store with local produce and other products that are in high demand.

The possibility to attract more individuals willing to work with small-scale agriculture was also expressed in the interviews. Local farms could then provide restaurants with locally sourced products. There is also a possibility to attract individuals working with different creative jobs, like creators, writers and artists. Since they most often work from home, a peaceful location such as the archipelago could be inspiring for their own trade and “a place for thinking and inspiration”. Visitors that were regarded as interesting to attract in a short-term perspective are foremost those from the Swedish market, as well as the adjacent markets of Germany and the Netherlands.

A common objective for the development work and that someone takes overall responsibility for making it happen, was also expressed as desired in the interviews. Several of the respondents see potential in working alongside each other on a general level in order to develop “Ostkusten” (The Östergötland coastline) as a destination of its own. Other possibilities of cooperation were also highlighted (Coast4us, over regional borders, cooperation with Lalandia in Motala which is planned at this moment, Astrid Lindgren’s world and Kolmården Wildlife Park). There is an overall desire to find new solutions to old problems. Private investments could also help and there is already an initiative in place to pinpoint potential investors and attract them by exemplifying the prospects.

SPECIFIC FOR ARKÖSUND

In addition to the above stated challenges and opportunities for the whole Östergötland archipelago, there are a few aspects that are specific for Arkösund. According to the interviewees, overall commitment to development in Arkösund is considerable with respect to the many thoughts and ideas about the future archipelago. Some want to keep things as they are and not develop too much in terms of construction, but there is, however, a number of speculators that have expressed their wish to develop commercial buildings in Arkösund. However,

finding suitable occupants is difficult. The archipelago's general store is an important gathering place and consequently possess an important service function. The development of the local hotel is perceived as positive, and there are plans for more local businesses such as restaurants. In the summer, Arkösund is a natural resting spot for boats in the archipelago, and many others come to enjoy the sun and sea, as well as public events such as "music nights". There is potential to develop more reasons to visit all-year-round, but if so, in balance with the local aura of calmness and the idyllic setting by the sea.

In order to create an understanding of the context in which the Östergötland and Arkösund Archipelago develops towards 2030, we will delve into important trends in the coming chapter.

TRENDS IN THE CONTEXTUAL ENVIRONMENT

Kairos Future has worked with contextual environment analysis for over 25 years. According to our studies and analyses, we conclude that the following trends in the surrounding world will affect the Arkösund archipelago as an attractive destination towards 2030.

1. AN ATTRACTIVE LOCATION IS ALL ABOUT CLOSENESS (AND TRANQUILITY AND NATURE)

What is considered as an attractive place to live naturally depends on whom you ask. However, our survey conducted with 6 000 swedes⁷ shows that we have more in common than expected in this regard. "Close" was the most used word when respondents were asked to describe an attractive location. Examining the answers more thoroughly, we learn that it is rather about close in time than close in distance. When asked what "close" means, we could see that in large urban areas it is for example important to be close to public transport, while in more rural areas it's more about being close to nature. Also noticeable is that *tranquility* and *nature* are prominent, both which are values the archipelago possesses today.



Figure 2: Word cloud with respondent’s description of what an attractive location is considered to be. “Nära” and “Närhet” translates to close and closeness, “Bra” means good, “lugnt” means calm and “natur” means nature. More significant words were used more often, smaller to a lesser extent. Question: It is said that an area can, at a further or lesser extent, be an attractive location for its residents. What do you consider as an attractive location?

What is considered as an attractive location also depends on your current life situation. According to our survey, the share of respondents who wish to live close to larger urban areas peaks among the younger population, tranquility during family phase between the age of 34-45, and finally leisure in the outdoors for the later stages in life. These variables can be crucial in communication efforts with potential movers.

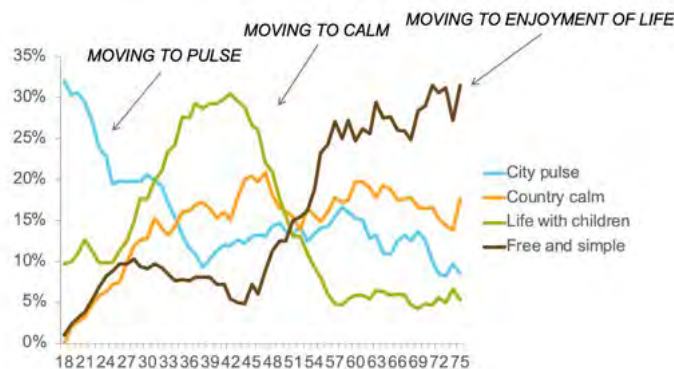


Figure 3: Share of respondents that possess strong preferences for the different variables divided amongst age groups.

In our annual survey of the Swedish population, we can see some tendencies that the countryside has become more attractive in the last two years. It is, however, too soon to determine whether this is a stable trend or just a phase, like how we saw the curve for to urban areas go down in 2018.

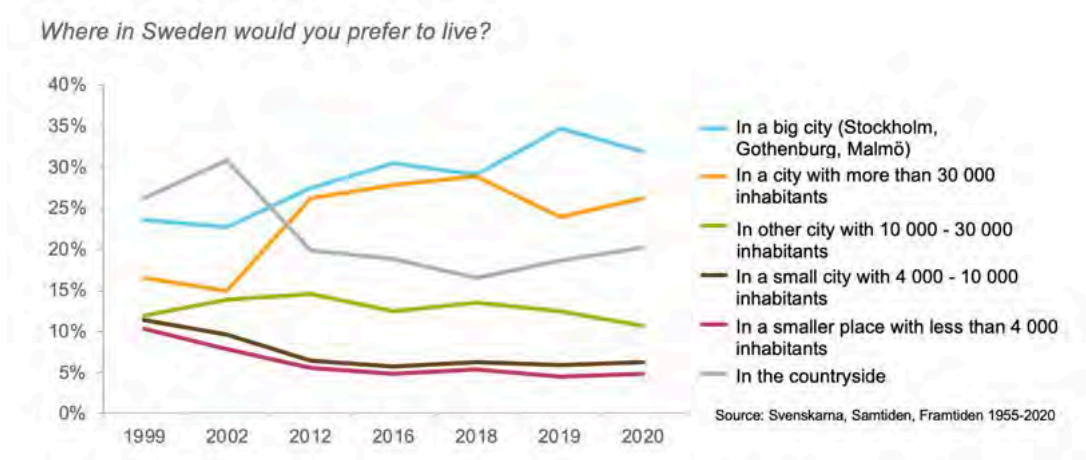


Figure 4: Share of respondents that would rather live in an urban, rural or densely built-up area.

We can conclude that the archipelago, with its unique nature and tranquil atmosphere, has potential to be developed as a residential area in the future.

2. PEACE AND QUIET ATTRACTS IN A CHANGING WORLD

We live in a fast changing world in which climate changes, pandemics and other unexpected occurrences alter how we live our day-to-day lives. At the same time, we feel pressured to fill our lives with meaningful activities to display on social media, and many have a hard time coping with every-day life. In a time when anxiety is increasing in society, we long for some peace and quiet. Many meditate or practice yoga to relax and calm down or engage in “forest-bathing.” The concept of forest-bathing came to Sweden a couple of years ago, and means bathing in natural wilderness whilst experiencing the tranquility of the forests, its pleasant aroma and atmosphere. In our surveys we can see that the interest that has gained the most in prominence amongst Swedes since the 1970s is to “rest and do nothing” (21% 1970 till 57% 2017).⁸ The archipelago can deliver the desired tranquility, for residents and visitors alike, and will most likely constitute an essential aspect of the attractiveness of the archipelago in the near future.

3. NATURE BECOMES MORE IMPORTANT

As our society become even more urban and connected, we can observe an increased longing for nature and that spending time in the outdoors has increased in status. In our 2019 survey, 54% of all Scandinavians said that being in nature on their holiday is considered high status, which is an increase from 39% in 2014. We can also see that 13% of all Scandinavians chose to categorize their main annual holiday as a nature experience and that the natural setting of locations is crucial when deciding where to go during the holiday. But what is an outdoor experience? In our Netnographic survey (Online Ethnography, e.g., analyzing social media posts)⁹ where we identified Nature lovers and 250 000 of their posts on social media we came to the conclusion that what is perceived as nature could include an urban park as well as a forest, and that an increasing number of nature lovers desire

more corrected outdoor experiences including guides and equipment. However, another growing group seek genuine natural experiences and a wish to stay in the nature for longer time-periods. Read more about these groups in appendix 3.

4. COZINESS IS STILL A TOP STATUS-SHAPER WHEN WE CHOOSE WHERE TO GO

Five years ago, we asked Scandinavians what they considered as low and high status when traveling. Back then, the top status-shaper was coziness, which 59% of respondents perceived as high-status in their social groups. In our 2019 survey, coziness kept its top position by increasing to 71% of all respondents. We can also observe that coziness is at the top in all Scandinavian markets except Finland, where “rest and relaxation” hold the top position as a status-shaper. For example, cozying-up in the archipelago at dusk in the autumn have the potential to allure visitors that are attracted to these values, alongside those who prefer to live in a cozy location.

5. EXPERIENCE-DESIGN BECOMES MORE IMPORTANT

In our 2016 survey about experiences, we identified how several critical components make up an attractive experience.¹⁰ Today, it is all about eliminating friction to make the experience as smooth as possible. For example by minimizing delays and preparing the visitor with information by surveying the expectations before the visit and make sure that the visitor has all the necessary equipment, as well as potential guiding. We can also observe that *transformation* (e.g., to learn something new or to be challenged) alongside *togetherness* (to experience something with friends and relatives), and meeting others with similar interests are all crucial components in an extraordinary experience. The archipelago has the potential to develop existing and new experiences that can attract residents and visitors alike to the area.

6. SUSTAINABILITY BECOMES A HYGIENE FACTOR

Sustainability is an important aspect to take into consideration towards 2030. In society several initiatives are well underway, as well as regulations following the UN:s sustainable development goals towards 2030. Consumers are becoming increasingly aware of sustainability in relation to consumption and traveling. This can be seen in our travel trend reports in which we see that Scandinavians intend to spend more on sustainable travel in the future.¹¹ Also in the change of attitude towards domestic travel. We observe that domestic travel is gaining status at the expense of more exotic destinations, which many groups consider to be “low-status” choice destinations. It is becoming increasingly important to offer a sustainable life in, or a sustainable visit to, the archipelago for consumers that are sustainably aware.

7. NEW INTEREST GROUPS ARISE (TRIBES)

The rise of digitalization in conjunction with an ever-increasing amount of people using social media on a daily basis, have resulted in new possibilities to meet and explore new exciting hobbies. We have for example observed that individuals

interested in knitting now can meet in different groups on Facebook and mountain bikers hang out on various online forums. The archipelago has the potential to attract different interest groups (both visitors and potential residents) that fully want to engage in their interests, and it could for example be sailing, the ocean, small-scale agriculture and writing. Even if it is challenging to attract visitors all-year-round, conducting directed marketing efforts to specific interest groups such as birdwatchers, boat- and nature lovers is a great complement to other existing identified target groups (like Visit Sweden's global traveler).

In a study, Kairos Future mapped the significant interests of Swedes and asked them to rank their three favorite spare-time hobbies. In the graph below, we have illustrated how the different interests relate to each other, creating clusters. To see the entire chart, see appendix 2.



Figure 5: A portion of the interest map: The 100 primary Swedish interests, and how they converge. Kairos Future, 2019.

8. INCREASED GLOBAL TRAVEL UNTIL COVID-19, BUT WHAT HAPPENS NOW?

There has been a global increase in international arrivals around the world in recent years, with a growth rate of 4% in 2019 (which actually was lesser than the highest recorded numbers in 2018 and 2017 respectively (+ 6%) according to UNWTO.)¹²

The annual Swedish growth for the tourism industry has been stable during the past ten years, with an increase of 3% per year on average. In Östergötland, the number of guest nights increased by 5% in 2019 and reached the amount of 1 925 549, of which 17% where international guests.¹³ In December 2019, the COVID-19 virus struck the city of Wuhan in China and has now spread around the world, which consequently has led to stagnation in global tourism. When restrictions are lifted and traveling commences once again, and when everything comes back to normal remains to be seen. We will probably travel closer to our homes and with higher safety precautions in the near future. And experiences from earlier catastrophes and crises clearly demonstrate that we will continue to visit our favorite locations and

find new ones to revisit. World Travel & Tourism Council¹⁴ has estimated that the virus will cause three months of stagnation for the industry starting in march 2019 and cause a 25% decrease in revenue for approximately 50 million workers around the globe.

Swedes will most likely spend their summer holiday of 2020 in Sweden, a trend that we could see even before the pandemic. Amongst others, the Swedish Railway organisation (SJ) took the opportunity to use this trend, known as “svemester” (swe-cation) and created a contest in the spring of 2019 amongst its customers regarding which foreign attractions could be replaced with Swedish ones. Here, the archipelago might find itself in the near future:

The best Swedish alternatives instead of an outbound trip*

1. *Trollsjön (Kiruna) – Lake Garda, Italy*
2. *Skuleskogen (Ångermanland) – Thingvellir national park, Island*
3. *Stenshuvud (Simrishamn)– The Caribbean*
4. *Åstol (Bohuslän) – Hydra, Greece*
5. *Kosterhavet (Bohuslän) – Abel Tasman national park, New Zealand*
6. *Ven (Öresund) – Isle of Islay, Scotland*
7. *Djäknesundet (Karlsborg) – Samos, Greece*
8. *Sundborn (Falun) – Giverny, France*
9. *Borås (Västergötland) – New York, USA*
10. *Mölle (Höganäs) – Biarritz, France*

* According to an SJ AB poll conducted in 2019¹⁵

THE DEVELOPMENT OF ARKÖSUND ARCHIPELAGO TOWARDS 2030

In order to generate an image of the future it is necessary to pinpoint specific certain trends and examine uncertainties and factors that are more difficult to evaluate. There are several methods in the scenario building process, and they all depend on the number of uncertainties that can be identified as necessary for the question of issue.

In this analysis, we have examined the following uncertainties:

- The number of people in the area:
 - a) Decreases
 - b) Increases
- The development will take place:

- a) Organically, since entrepreneurs have the possibility to expand and develop more products and services all year round.
- b) By external investment
- c) A collective strategic development

In the following chapter, these uncertainties will be explored as “what if? scenarios”. These scenarios illustrate how the future might be by taking the uncertain into account. The COVID-19 Pandemic will most likely affect how we travel and reside in the future. This report was written during the crisis in March/April 2020. We have therefore taken this into consideration, and consequently written the scenarios in the perspective of “life after COVID-19”, in which we explore its potential impact in the long run.

WHAT IF... AN INCREASED AMOUNT OF LOCAL COMPANIES HAVE THE POSSIBILITY AND COURAGE TO INVEST IN LONGER OPENING HOURS AND NEW SERVICES/PRODUCTS

In 2030, new creative solutions, developed by the companies in the archipelago since 2020, have created a unique range of services and activities contributing to making it an attractive place to live and stay. The companies have been able to hire more staff and there are more entrepreneurs who provide services for residents and experiences for the hospitality industry.

The companies that had the opportunity and the courage to offer services, activities, and experiences during other parts of the year outside the summer season have flourished and have customers among both full- and part time residents and visitors from near and far.

The starting point was a joint decision to develop products and services aimed at certain target groups and their needs. Some of these products and services are now seen as the best in the market and well known beyond Sweden's borders within their niche. It is now easy to find staff with the right competence as it is attractive to live and work in the area. Residents enjoy the extended service developed over the years in the form of better craft services, transport, shopping, café and events.

Signals highlighting that this scenario will occur:

- Entrepreneurs join forces to create common resources (such as staff, marketing and development money) and develop new products and services
- Opening hours are extended and there are new offers within services and activities for residents and visitors

How sustainable is this scenario?

Looking at the three dimensions of sustainability, we can see that:



- The economic effect (brown) will be great for individual entrepreneurs if they have the opportunity and resources to expand their business, and if they have success in creating the right products / services for the right target group.
- The ecological sustainability (green) is less successful, as there is no greater interest in preserving nature.
- However, social sustainability (orange) can be satisfactory as this scenario creates good conditions for work and a good life with attractive services / services in the archipelago. This scenario lacks a holistic plan for sustainable development, and there is a risk that the companies will see to their own interests rather than the interests of the archipelago as such.

WHAT IF... A LARGE EXTERNAL INVESTMENT IN A VISITOR ATTRACTION THAT BRINGS 100 000 VISITORS A YEAR

In 2022, the whole archipelago was cheering when it became evident that a private investor had decided to build a new visitor attraction in the area! Eight years later, in 2030, the new attraction is in place after several years of planning and commitment from both public and private sources.

The visitor attraction has so many visitors that the "triangle" (Lalandia in Motala, Kolmården's Zoo and Astrid Lindgren's world) has now received a fourth member. The entire archipelago now attracts visitors year-round.

Every year the site has seen an increase in visitors. The archipelago is now best known for the visitor attraction. Initially, the full- and part-time residents who lived nearby thought it was a fantastic initiative as it meant better service, but in recent years the number of visitors has boomed and disturbed the silence that many actually moved here to experience. Most people visit the area for this particular attraction rather than to enjoy nature, which has prompted the local government to tighten rules and restrictions on how to stay in the protected area. Some also argue that tourists only come for the attraction and don't consume any activities in other parts of the archipelago where some have their business. However, a considerable amount of jobs is created, and the main attraction also contributes to several smaller service providing companies.

Signals highlighting that this scenario will occur:

- A process to actively seek out private investors is initiated
- A private investor shows interest and will invest in the area
- The municipality and region are involved in the plans and create conditions for success.

How sustainable is this scenario?

- The economic effect (brown) is likely to be great for the area with new jobs and increased consumption, but there is a great risk that large parts of the revenues (and the power of how the area is to be developed) will end up in the hands of one actor, which in this scenario is an external one.
- The ecological sustainability (green) is less well met as the visitors who flock to the area do not have nature as their first priority, and there is no plan for how they should behave in nature.
- The social sustainability (orange) is less satisfactory as focus lies on the small area around the attraction itself (where there is a high density of visitors), while the rest of the archipelago is left out – with less services.



WHAT IF...THE NUMBER OF PEOPLE IN THE AREA DRAMATICALLY DECREASE (50% FEWER RESIDENTS AND VISITORS THAN IN 2020)

Travelling restrictions have become the new normal after pandemics, terrorist-attacks, and climate change. These ever-increasing costs for society unfortunately lead to fewer having the means to travel, and subsequently the number of visitor to archipelago volumes decreases. These are not the only factors causing revenues to decline, the archipelago is also facing increasing competition from other destinations investing in destination development. Entrepreneurs who offered services and activities such as kayaking or craft services in 2020, have moved elsewhere as a result of the decreasing demand.

The few permanent and part-time residents still residing in the area cherish an archipelago without visitors but are concerned with the decreasing amount of service offers and the poor public transportation. As it has become more difficult to reside in the archipelago, it is difficult to find the right type of individuals who are willing to do agricultural work in the area. Consequently, the nature in the archipelago year 2030 differs from that of 2020. The flora and fauna is disparate and former trails are now overgrown with shrub and weeds.

Signals highlighting that this scenario will occur:

- Tourism businesses and other companies disappear from the archipelago
- Less tax-revenue as a result of fewer visitors and residents
- A decrease in service-offers
- Less people use public transport
- Parking-lots form urban deserts
- The number of individuals interested in acquiring part-time housing decreases



How sustainable is this scenario?

- The economic effect (brown) would be almost non-existent, since the number of customers decreases dramatically.
- The sustainable aspect (green) is certainly satisfactory in some sense, since the local nature is under less pressure. The open landscapes have however, disappeared, which has altered the local flora and fauna.
- The social aspect in this scenario (orange), is not as satisfactory since permanent residents initially finds the fewer visitor volumes positive, but subsequently must cope with less service and poor infrastructure as a result of fewer visitors and permanent residents

WHAT IF... THE NUMBER OF INDIVIDUALS THAT WANT TO RESIDE OR VISIT THE AREA INCREASES BY 100%

All of a sudden there was a BOOM and the tranquil nature of the archipelago attracted more visitors than ever before! As a result of increasing housing prices and smaller living spaces in the cities, more individuals sought the open spaces, coastal beauty and tranquil nature of the archipelago.

In the current thought-based society, where on the labor market many compete with creativity and intelligence, and often against new technical devices and algorithms, nature has proven to develop the skills most sought after by humans; creative problem solving skills. In 2030, the idea of what “an office” is has changed, and as a result more permanently reside in the archipelago, especially since the reception and online connection has become much better.

Activity-based businesses are occupied all-year round with those who wish to undertake courses, explore new activities and go on guided boat tours in the archipelago. At some points, the occupation rate were so high that waiting lists had to be organized! A plentitude of activities is offered in order to meet the requirements of the broad range of different interests among the residents of the archipelago.

Visitors and residents can visit the area freely and without regulation and protecting the nature has therefore become increasingly difficult despite the wishes of the permanent residents. If public littering was an issue in 2020, it cannot nearly be compared to the present situation. Despite many efforts to promote a sustainable lifestyle in the society and the installation of more trash-bins, the high number of visitors takes its toll on the local fauna. The archipelago has witnessed a severe transformation in which its former tranquility has been replaced by jet-skis that are frowned upon by everyone besides the short-term visitor.

Signals highlighting that this scenario will occur:

- The number of individuals who use public transport and marine traffic increases.
- The number of available parking spaces decreases even more.
- The number of individuals interested in acquiring a part-time home increase.
- Public waste increases
- More all year-round over-night stays.

How sustainable is this scenario?



- Considering the increasing number of individuals in the area, the economic effect should be quite satisfactory (brown). However, most are not in there to consume (or do not know what can be consumed as there is a lack of information).
- Sustainability (green), is fulfilled to a lesser extent since there is no regulation or information regarding how to behave when visiting the archipelago, as a result, the local fauna suffers.
- The social sustainability (orange) is less satisfactory since the values that shape a tranquil archipelago are overshadowed by “unwanted” types of visitors.

WHAT IF...A STRATEGIC DESTINATION DEVELOPMENT WITH A FOCUS ON JUNCTIONS OCCUR

After many years of projects, ideas and inquiries, the prominent actors in the archipelago finally came together in order to collectively and strategically develop the area. The time was right to finally fulfill all those dreams that had persisted for years and put all conflicts aside. It was now time to focus on the common interests and to compromise in order to achieve a sustainable development for man and nature alike. A network was formed comprised of representatives from the public sector, the trade industry and local inhabitants around questions such as how individuals traverse the area, the residents' wishes to maintain a tranquil archipelago, and the development of digital infrastructure. In everyone's interest, a collective arrangement was conceived on how residents and visitors alike best can enjoy the area.

Now, in 2030, there are several smaller destinations with facilities such as accommodation, restaurants, grocery stores, gas stations and not to mention a plentitude of activities. In close proximity to these destinations, it is possible to find information about the archipelago, and perhaps most important, how to behave when visiting the area in order to sustain the archipelago for future generations. Marketing efforts is strategically directed towards potential target groups, mainly those longing for tranquility and inspiration, those with an interest in nature, and those who can work and reside in the area.

The desired visitors are regular guests all year around, no matter the season, and they want to experience, reside and consume activities for days at a time. The collective strategy has lead to some larger investors being declined in favor of smaller local entrepreneurs, and some areas have been more prioritized than others. Naturally there have been some conflicts down the road, but the collective mindset has been fixed on this scenario.

Permanent and part-time resident are grateful because of their tranquil neighborhoods without heavy loads of visitors, but also because of the ever-increasing work opportunities and facilities that have emanated in the archipelago! The number of permanent residents has increased in order to fulfill the all-year need for personnel in the junctures, and as a result of the larger population in the area, the public sector has grown side by side with prospecting families with children who long for a tranquil life in the Arkösund archipelago and its surrounding areas.

Signals highlighting that this scenario will occur

- A gradual increase in visitors, increased revenue
- An overall determination and commitment for joint development manifested in action amongst residents, public figures, and the local industry.
- A strategy is formed with a definite share of responsibility and intention that is regularly verified to see that projects are implemented.



How sustainable is this scenario?

Positive economic result (brown) from this scenario since cooperative action to find the right offers to potential interest groups will be undertaken all year around.

The sustainable aspect of the scenario (green), should also be content since sustainable planning with respect to the natural habitat will be taken into consideration in the outlining of operations.

The social aspect (orange) of this scenario is very satisfactory since local interests will be taken into consideration to a large extent.

RECOMMENDATIONS

1. HAVE IN MIND THAT NATURE FORM A BASIS FOR ATTRACTIVENESS...

As the analysis shows, it is evident that the archipelago's unique character and natural setting is what draws individuals to the region, and that will most likely increasingly be the case in the future. A sustainable balance is a must if man and nature are to thrive in the same area, whilst at the same time constituting a flourishing archipelago.

2. ... BUT THERE IS A NEED FOR SUSTAINABLE NEW BUILDINGS AND INFRASTRUCTURE

Despite the need to put nature first, some basic infrastructure must be established in order to generate and encourage a thriving archipelago. It could be by enhancing logistic chains, basic utilities and public grill spots, but also by facilitating sustainable operations for entrepreneurs. It is also a way to manage tourism away from areas that are more sensitive in character.

3. WORK STRATEGICALLY WITH DESTINATION DEVELOPMENT IN THE FUTURE

Both trends and the analysis show the importance of creating a common vision and goals. The collective vision for the area has to generate a broad engagement in order to succeed with the development of the archipelago, whilst at the same time taking its unique values, character and tranquility into consideration. By visualizing a desired future, prioritizing what needs to be done next becomes less painful.

4. PINPOINT KEY TARGET GROUPS, IN ORDER TO IDENTIFY INTEREST GROUPS THAT FIT THE ARCHIPELAGO'S OFFERS

Resourceful segmentation based on interests and values possesses great potential for directed marketing efforts to those whom might be interested in visiting or moving to a specific area, which most often constitutes a diverse crowd. It might be those that long for tranquility or proximity to nature, or perhaps those that possess the ability to work from home. Extensive marketing efforts are seldom the key here, rather small-scale and intelligent operations produce the most satisfactory results.

5. ENHANCE PRODUCT DEVELOPMENT, TO GENERATE SERVICE

The analysis demonstrates that residents desire better service, and more all-year around activities in order to spread out tourist flows and create a more sustainable archipelago. In order to achieve this, pinpointing target groups, and using contemporary trends as a basis can enhance innovation processes as well as alluring potential visitors to visit the archipelago all year around.

ABOUT KAIROS FUTURE

Kairos Future is an international consulting and research company that assists companies, organizations, and leaders in understanding and shaping their futures. Our vision is a world where everybody puts the future first. For many years we have delivered relevant insights of the future through presentations, scenario analysis and trend reports for global companies, governments as well as government agencies, regions, more substantial as well as smaller sized companies, and interest organizations alike. We have for more than 25 years held hundreds and hundreds of strategy and innovation processes and have advised on how to design an organization capable of operating in the future.

We conduct our own research within a plentitude of different areas such as tourism, consumer behavior, regional development through a national as well as an international perspective, and the attractiveness of destinations. We have access to a comprehensive trend-database containing global survey data and trend-watching (over a thousand trends).

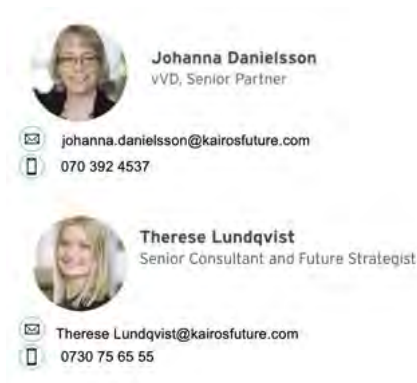
In order to experience interesting perspectives on the future, on topics such as the Corona crisis and the tourism industry, listen to our podcast “Framtidsstudion”:
<https://www.kairosfuture.com/se/info/framtidsstudion/>

For more information, see www.kairosfuture.com or contact us:

Kairos Future

Box 804
101 36 Stockholm
Besöksadress: Västra Järnvägsgatan 3
08-545 225 00
info@kairosfuture.com
www.kairosfuture.com

Therese Lundqvist and Johanna Danielsson have realized this report:



APPENDIX 1: MAP OVER ARKÖSUND ARCHIPELAGO

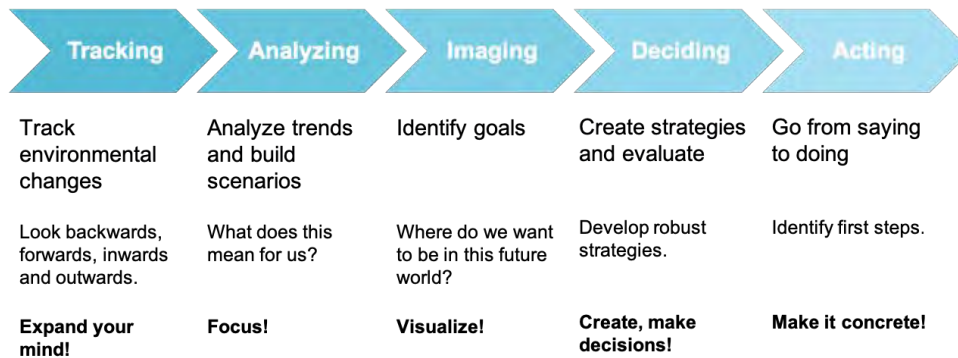


APPENDIX 2: A METHOD FOR SCENARIO ANALYSIS

Kairos Future is an international consulting and research company that assists companies, organizations, and leaders in understanding and shaping their futures. Our vision is a world where everybody puts the future first. For many years we have delivered relevant insights of the future through presentations, the world-analysis and trend reports for global companies, governments as well as government agencies, regions, more substantial as well as smaller sized companies, and interest organizations alike. We have for more than 25 years held hundreds and hundreds of strategy and innovation processes and have advised on how to design an organization capable of operating in the future.

We conduct our own research within a plentitude of different areas such as tourism, consumer behavior, regional development through a national as well as an international perspective, and the attractiveness of destinations. We have access to a comprehensive trend-database containing global survey data and trend-watching (over a thousand trends).

The TAIDA- model – A framework for operational readiness in the future.
Our scenario analyses derive from Kairos Futures self-developed TAIDA- model, which we use as a basis for a variety of different assignments and training regarding the adjacent world, future, strategy, and vision. TAIDA in its five steps:



Tracking – By trend watching and world survey.

Analyzing – To create a better understanding of how these alterations imply a specific question at issue. E.g., by developing scenarios.

Imaging – By conceptualizing desired future scenarios, targets and visions

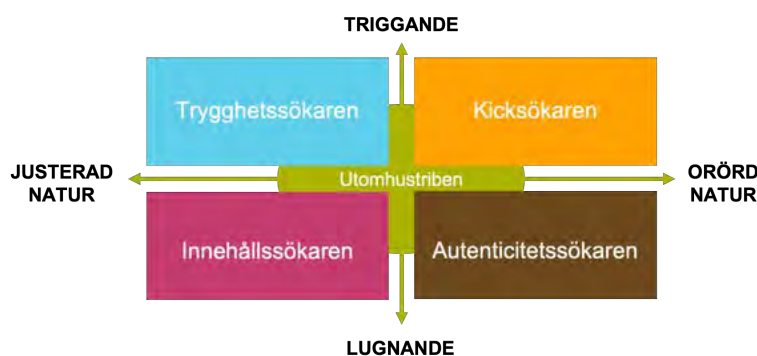
Deciding – To create strategies and choosing the most appropriate path.

Acting – att ta fram en handlingsplan, och en plan för uppföljning.

The scenario analysis of this report has used; Tracking och Analyzing. It is benefiting to continue to process of conceiving visions, ambitions and strategies from the scenario analysis material onwards.

APPENDIX 3: THE INTERNATIONAL OUTDOOR TRIBE

Our study "The future of outdoor experiences," conducted in 2019, was constituted alongside other methods by a Netnographic survey in which we examined how outdoor adventures were described online and on social media. We analyzed 250 000 posts in Chinese, English, German, and Swedish. In those posts, we found, amongst a plentitude of other things, these sub-groups of the global outdoor tribe.



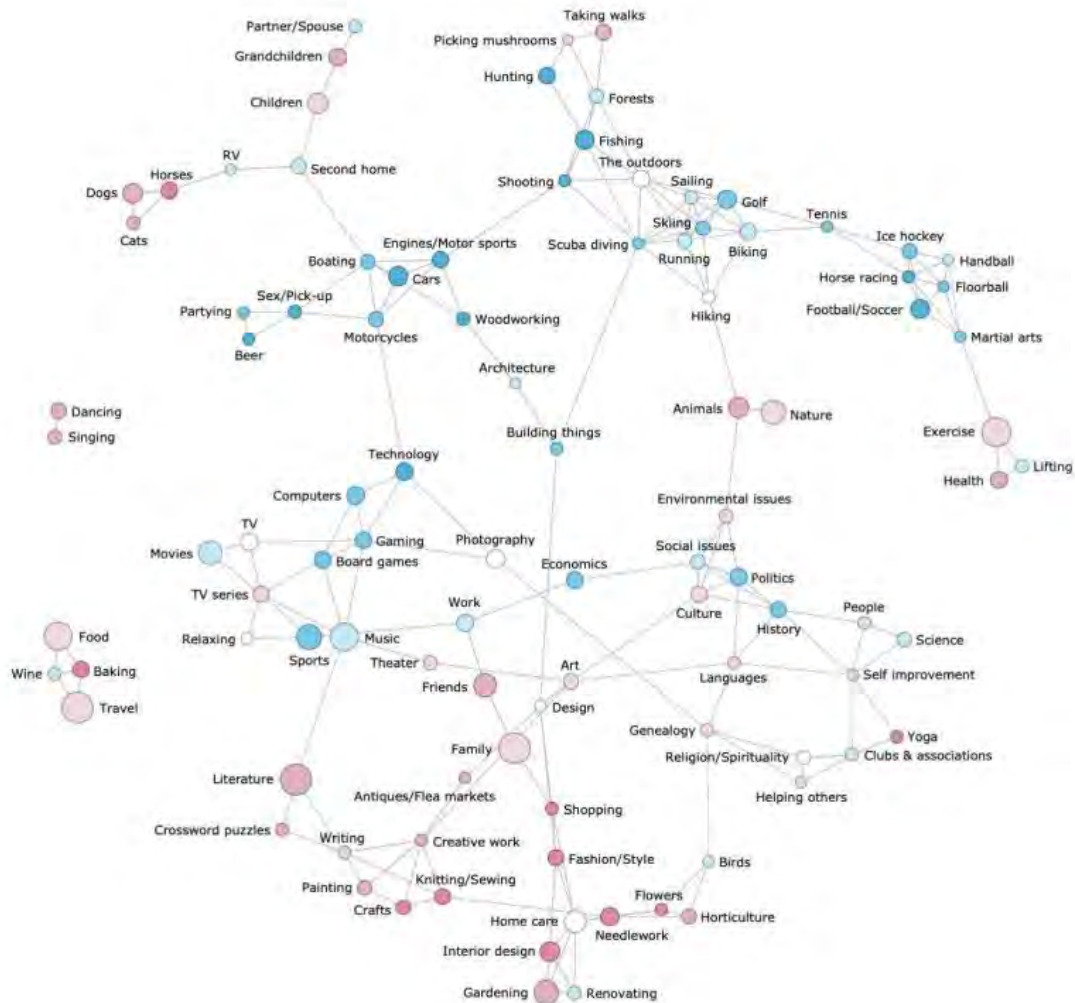
The Kick-seekers want to be challenged, push their limits, and experience that rush of adrenaline. They long for places that are genuine and untouched (not overpopulated by “tourists”). They are usually organized and fully equipped before they travel and take pride in planning their trip. The activity itself is most often the pivotal reason for traveling.

The Authenticity-seekers are patient and possess a long-term perspective. They do not seek that temporal adrenaline rush, but rather the activity itself, in which they usually can spend hours. They are usually experienced and well equipped, both in terms of clothing and equipment. When not being in the great outdoors, they prefer to visit good restaurants and bars, as well as shopping.

The Content-seekers mention the beautiful aspects of nature more than other groups, and they are ever searching for that perfect vantage point. They tend to travel in groups and prefer a guide to accompany them – above else, if that guide can show them the best photo locations on site. They frequent restaurants, cafés, and shops when not being in nature.

The Safety-seekers also like to challenge themselves. However, their understanding of that concept somewhat differs from the Kick-seekers. They search for activities that are slightly outside of their comfort zone, but these should, according to them, be organized by an expert or guide in order for them to feel safe. It is highly credible that you will find them at different encampments or courses.

APPENDIX 4: CHART OF INTERESTS



Kairos Future 2019: The 100 primary Swedish interests.

What interests correlate with one another? Individuals that find horses interesting are not necessarily the same individuals that are interested in horse racing. However, if you want to reach out to those interested in horse racing, off-season, there is a good chance that you will find them at the hockey rink during the winter. How can we know this?

We asked 50 000 Swedish respondents to write down their three significant interests. Later, we calculated which interests were shared by similar individuals. With the background to the research, we could define the circumstances of the relationships between the reported benefits and create the network above. (The size of the circles is proportionate between reported interests and overall popularity; pink contra blue is proportionate to the number of female/male respondents).

REFERENCES

-
- ¹ Gro Harlem Brundtland, Bertil Hägerhäll, 1988: Vår gemensamma framtid: rapport från Världskommissionen för miljö och utveckling under ordförandeskap av Gro Harlem Brundtland
- ² FNs globala hållbarhetsmål mot 2030: <https://www.globalamalen.se/>
- ³ Intervjuer under mars 2020 med:
- *Carl-Gustaf Hamilton, skärgårdsutvecklare för Region Östergötland, Norrköpings, Söderköpings och Valdermarsvik kommuner*
 - *Malin Thunborg, enhetschef enheten för tillväxt, Region Östergötland*
 - *Anna Jacobsson, landsbygdsstrateg, Region Östergötland*
 - *Emil Selse, ansvarig projektet Hållbar produktutveckling, Region Östergötland*
 - *Ranko Simic, näringsliv och projekt Länsstyrelsen Östergötland*
 - *Lars Gezelius, Naturvårdshandläggare vatten, Länsstyrelsen Östergötland*
 - *Christina Leinonen, näringslivsutvecklare, Norrköpings kommun*
 - *Karl Braune, exploateringsingenjör Norrköpings kommun*
 - *Therese Eklöf, näringslivs- och turistchef, Söderköpings kommun*
 - *Ingela Granqvist, landsbygdsutvecklare/projektledare, Norrköpings kommun*
 - *Håkan Mauritzon, projektledare pilotområde Bergön*
- ⁴ Region Östergötland, Norrköpings kommun, Söderköpings kommun, Västerviks kommun, Oskarshamns kommun, 2017: *Gemensamt utvecklingsprogram för kust och skärgård i Östergötland och Norra Småland 2030*
- ⁵ Coast4us är ett Interreg-projekt, som finansieras av EU Central Baltic-programmet. Syftet med projektet Coast4us är att ta fram förbättrade planeringsunderlag för kust och skärgård och arbeta med lokal demokrati. www.coast4us.com
- ⁶ www.treehotel.se
- ⁷ Kairos Future, 2016: Vad är en attraktiv plats?
<https://www.kairosfuture.com/se/publikationer/rapporter/morgondagens-boende-och-flyttmonster-del-2/>
- ⁸ Kairos Future, 2020: Svenskarna: Samtiden och Framtiden
- ⁹ Kairos Future, 2019: The Future of outdoor experiences
<https://www.kairosfuture.com/se/publikationer/rapporter/the-future-of-outdoor-experiences/>
- ¹⁰ Kairos Future, 2011: Upplevelser i världsklass.
<https://www.kairosfuture.com/se/publikationer/rapporter/framtidens-upplevelser/>
- ¹¹ Kairos Future, 2019: Kairos Future Travel Trend Report 2019
- ¹² UNWTO, 2020: Travel barometer 2019 <https://www.unwto.org/market-intelligence>
- ¹³ Tillväxtverket/SCB, 2020: Gästnattsstatistik 2019 <https://tillvaxtverket.se/statistik/vara-undersokningar/resultat-fran-turismundersokningar/2020-02-06-gastnatter-2019.html>
- ¹⁴ <https://www.wttc.org/about/media-centre/press-releases/press-releases/2020/coronavirus-puts-up-to-50-million-travel-and-tourism-jobs-at-risk-says-wttc/>
- ¹⁵ <https://www.sj.se/sv/om/om-sj/borta-bra-men-hemma-bast/omrostning.html>