



Four future perspectives of the visitor economy after COVID-19

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The global visitor economy is in crisis

The international visitor economy is currently experiencing a severe crisis. The outbreak of the corona 'COVID-19' virus in December in China and the exponential spread of the virus across all continents has led to a global pandemic which is unparalleled. To limit further spread of the virus many countries have proclaimed a so-called lock down. Social life has been blocked with the result that the economy has come to a grinding halt worldwide, with the visitor economy in its wake. Events have been cancelled, traveling on shorter (domestic) and longer distances (international) has become impossible and people are no longer allowed to come together in groups. As a result, public transport is no longer possible, aircrafts remain on the ground, turnover of firms in tourism and leisure as well as the hospitality industry has completely evaporated, with a prospect of bankruptcies and growing unemployment. The question is how long the virus will remain among us and how long the crisis will last. This situation creates fear and uncertainty, especially because there is no clear future perspective.

2

Scenarios offer future perspectives

Scenarios can help to outline a medium- or longer-term perspective and to break away from the short-term solutions presented to us by the media every day, however important these might be. Therefore, it is not surprising that the notion of scenarios is popping up frequently. However, different interpretations of the word and/or concept of scenarios are used interchangeably. Some make use of so-called predictive scenarios. Such scenarios make use of hard data and statistical models to make prognoses or forecasts of the possible development of the pandemic over the next weeks, months or years. Others refer to goal-based scenarios. These types of scenario establish alternative courses of action or strategies that can be used to achieve certain goals. Based on, for example, political considerations, a preferred scenario is then initiated to lead the way.

There is another type of scenario worth noting, namely explorative scenarios. These scenarios outline future perspectives of the force field that a business, organization or sector could encounter in the medium or longer term. Such scenarios do not only help to understand how the force field might develop. They also provide those involved with inspiration to think ahead, break new ground, and to increase resilience and contribute to future-proofing the visitor economy.

3

Exploring the future

For the international visitor economy it is valuable to explore how the force field might develop using explorative scenarios. Over the years, some factors may have become more important, others less. For some forces it will be fairly certain how they will develop in the coming years, for others it is extremely difficult to predict. The disruptive power of the COVID-19 crisis could be so big that it will be a game changer for many factors on which the national and international visitor economy depends. This makes the development of the force field that the sector will have to deal with over the next couple of years diffuse and uncertain. Explorative scenarios can be used to explore that force field and to map out the circumstances that the visitor economy could face.

CELTH, the Dutch Center of Expertise for Leisure, Tourism & Hospitality, wants to help destinations, business and organizations involved in the visitor economy to sketch a perspective that offers guidance in finding new ways to anticipate the future with confidence. CELTH is a consortium in which experts in the field of leisure, tourism and hospitality from Breda University of Applied Sciences, NHL Stenden University of Applied Sciences and the associated European Tourism Futures Institute (ETFI) and HZ University of Applied Sciences and the associated Knowledge Center for Coastal Tourism (KCKT) join forces to assist the tourism industry nationally and internationally, both solicited and unsolicited. In this time of crisis, a group of experts from the universities associated with CELTH have taken the initiative to explore the future perspective at the mid-long term and to lend a helping hand with a scenario study with which the conversation about future direction can be facilitated.

CELTH sees this scenario study as a development process in which a first step has now been taken. We hope that it can form the basis for a conversation between the stakeholders in the global visitor economy. The aim is that such a conversation will lead to further exploration of what the future after the COVID-19 crisis might look like and to a supported perspective that provides inspiration for the evaluation of existing policies and strategies and / or taking other or new roads to the future.

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The force field explored

We have been following the media closely for several weeks. The developments and possible consequences brought up by experts in the media have been monitored and linked to our own expertise. An analysis of these insights has led to shortlist of factors that we believe will influence and determine the future of the visitor economy, without the sector being able to influence those factors itself. By mapping the relation between the factors, we were able to identify five so-called driving forces of change.

1. The role of nation states

Will countries opt for reshoring, i.e. withdrawing production from distant countries, resulting in de-globalization? Will the question of geographical distribution be questioned in order to certify security of supply? How will geopolitical tensions within the EU and between West and East on the world stage develop, and what consequences will this have for free movement of persons, open or closed borders, border controls? Will there be more solidarity or has the crisis led to more lasting tensions?



2. The role of the public and semi-public sector

How will a financial buffer for the sector be developed? By general taxes or by additional tourist taxes with which funds can be filled by the market? Or by means of long-term financial injections? Will the costs be passed on to all citizens or only to the wealthiest? How will the influence of governments develop? Will they get smaller (deregulation, privatization, market thinking, small public sector, little concern for citizens) or bigger (strong collective sector such as in health and education, focus on public welfare, welfare state)? And, in relation to this, how will the relationship between national, provincial and local governments develop? Will governments consider man to be superior, equal or subordinate to the economy and how will this be expressed? How will cooperation and solidarity develop between governments, employer associations, trades unions, trade organizations and entrepreneurs? Will there be more solidarity or more polarization and hostility?

3. The role of large (multinational) businesses and corporations

Will they be dominating the market? Will there be acquisitions and development of conglomerations? Will they remain in the mode of ceding profits to shareholders? Will they settle for less profit in times of adversity or will they hold hands with the governments? How will investor confidence develop?



4. The attitude and role of the citizen since have tasted a 'different' world

Will a new consciousness emerge? Will people develop a different perception of the feasibility of the world, and of the environment and climate? Will the way people live together change from the point of view of social hygiene? Will more involvement, unity and solidarity arise? Will local connectedness at street, neighbourhood, district, city and / or regional level increase and will new regional identities emerge? Will the citizen become more creative and will he increase his ability to improvise? Will the function of social media versus traditional media change? Will the citizen make different choices as a consumer? Will he put his focus on individual and especially material prosperity or on public welfare? What role will they allow the government in relation to privacy? How will the gap and the tension between generations develop?

5. Length and depth of the crisis

When will a vaccine be widely available and will social distancing be released? How will government's debts develop and what consequences will it have? Will there be inflation or deflation, and to what extent? How will the level of prosperity and consumer confidence develop? How will the macroeconomic situation in major tourism generating countries?

It is clear that each of the aforementioned forces raise numerous questions. Questions that give an indication of the uncertainty surrounding the future.

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What are the most important uncertainties?

Above, we've mapped 5 key forces that we think will shape the visitor economy in the next 5-7 years. Those forces and the way in which they interact will create all kinds of uncertainties for the coming years. In order to be able to sketch a perspective, the uncertainty must first be delimited. We do this by taking the forces that we believe will have the greatest impact and at the same time are the most unpredictable as our starting point. These forces are called the key uncertainties. There is no doubt that the extent to which the influence and unpredictability of the above-mentioned five forces may be differently perceived by governments, sector organizations or businesses in the visitor economy. Normally, in our projects we facilitate workshops in which the representatives of such stakeholders share knowledge and expertise, exchange perspectives and jointly reach a consensus. Now that the COVID-19 crisis does not allow for such workshops, as experts we have engaged in online discussions to identify the two most powerful and unpredictable forces of importance for the development of the visitor economy in the medium term: the length and depth of the crisis and the moral dilemma of the citizen / consumer.



These two key uncertainties frame, as it were, the context for four future scenarios of the visitor economy. The table below delimit the range of uncertainty of both key uncertainties. That bandwidth is determined by the plausible extremes in which those two forces could develop over a period of 5-7 years.

Key uncertainties

1. Length and depth of the crisis
2. Moral dilemma of the citizen / consumer

Key uncertainty 1. Length and depth of the crisis

Short/shallow recession

Vaccine widely available in 2020; lockdowns and social distancing comes to an end; the economy will recover in 2021.

- Consumer confidence restored, high level of welfare, but low level of wellbeing.
- Elections / political shift: economy superior to man, culture and nature; neo-liberalism and populism have increased further.
- Small role of governments (deregulation, market thinking, privatization and therefore small / marginal public sector), care for citizens is limited.
- No or limited cooperation between central governments, provinces, municipalities, employer associations, trades unions, trade organisations and entrepreneurs.
- Governments and individuals create financial buffers to avoid future crises.
- Public debt has increased, but political measures to weaken the dept put pressure on citizens; profits of large companies flow to shareholders.
- The financial legacy of the crisis is passed on to the citizens, each gets an equal share, which reinforces the dichotomy in society between rich and poor.
- Large geopolitical tensions within the EU and between world countries because countries want to protect their own economy and health; little mutual trust and solidarity; open borders and free movement are limited; production from distant countries has been withdrawn in order to guarantee security of supply (de-globalization); more armed and cyber conflicts; US world leadership further eroded; influence of China, Russia, North Korea has increased further.
- Trade and transport are flourishing; oil prices are high.

Long/deep recession

Vaccine will only become available to the world population in 2022; the COVID-19 virus returns annually in waves as seasonal flu; governments frequently call for a new lockdown; the global economy remains under pressure, and recovery will only be achieved after 2025.

- Consumer confidence low, low level of welfare, but high level of wellbeing.
- Elections / political shift: people, culture and nature superior to economy; socialist ideas are leading.
- Strong role of governments; strong public sector, financed with tax money; new type of welfare state for the protection of citizens.
- Solidarity between central governments, provinces, municipalities, employer associations, trades unions, trade organisations and entrepreneurs for the common goal: joint care for society and the environment in which we live (including greening).
- The parties involved share the financial resources.
- Public debt has become immeasurably large; large companies, if the situation allows, donate part of their profit to the public interest, and vice versa, losses are compensated for in bad times with public money.
- The financial legacy of the crisis is passed on to the citizens, proportionate to their financial means.
- Geopolitical solidarity, consensus and cooperation between countries in the EU and between world countries; open borders and free movement of persons; less armed and cyber conflicts.
- Trade and transport in a deep trough, which results in low oil prices.

Key uncertainty 2. Moral dilemma of citizens/consumers

I

- Man has not learned from the crisis and has fallen into old patterns.
- Values underlying views on nature and the environment remain the same. Nature is feasible, humans are the dominant species.
- The aim is individual prosperity.
- Focus on material needs. Unlimited drive to consume.
- People want to keep control themselves because of privacy.
- Self-interest is paramount. Rebelling against the other and polarization (race, ethnicity, gender, social class, generations e.g. GenZ vs. GenY & Z, youth vs. elderly).
- Social media as outlet for discontent about the other. Public sector and authorities have no respect (government, science, police, teachers, etc.).

We

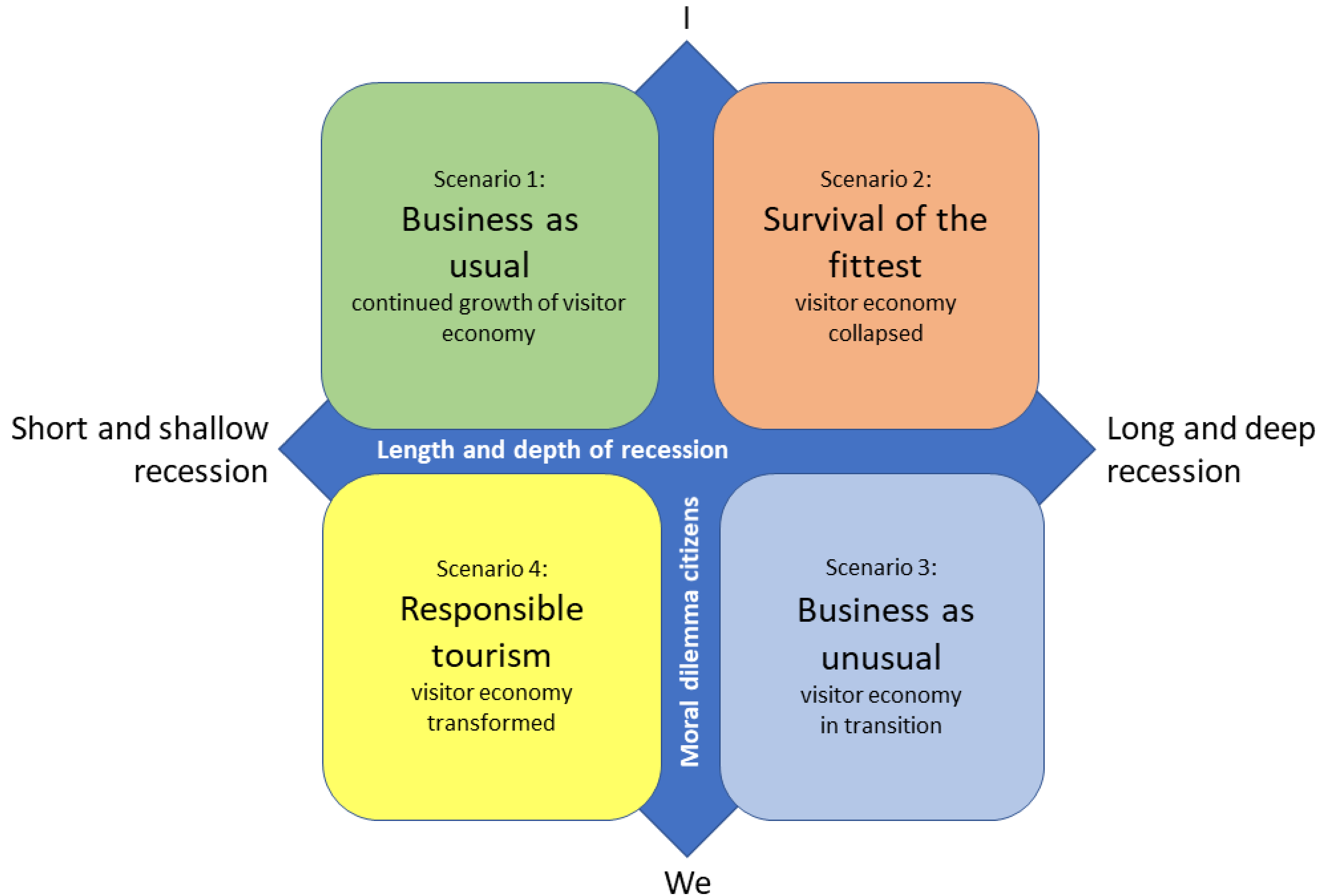
- The crisis has brought people to repentance.
- Citizens more aware of the inseparable relationship between man and nature and its effects on health. Rethinking of the value of nature, the environment, local residents, traditional media.
- The aim is collective well-being.
- Focus on quality of life. Consumption is attuned to this.
- Man is willing to hand over part of control to governments, despite the use of technological tools (drones, facial recognition, apps).
- Common interest is paramount. "Social hygiene": people consciously think about the implications of their own actions for others. Commitment, togetherness, solidarity, regardless of race, ethnicity, social class, generation, age. Local solidarity in street, neighborhood, district, city and region.
- Social media are social again, facilitating connections genuine between people. Public sector and authorities enjoy full respect (government, science, police, teachers, etc.).

A framework of four future scenarios

Both key uncertainties with their delimited bandwidth can be combined in a cross. Thus they provide a framework for scenarios:

1. A future scenario framed by a short/shallow crisis and an I-oriented citizen.
2. A future scenario framed by a long/deep crisis and an I-oriented citizen.
3. A future scenario framed by a short/shallow crisis and a we-oriented citizen.
4. A future scenario framed by a long/deep crisis and a we-oriented citizen.

Four different contexts, each leading to a very different future perspective of the visitor economy. A suitable title has been devised for each of these scenarios. In the following picture, the two core uncertainties with their bandwidths form a cross in which the four scenarios have been positioned.



As soon as the crisis ends, the tourist lapses into his old behaviour. The demand for travel has accumulated into a reservoir that now suddenly "empties". Businesses smell their opportunities, fully respond to the reborn demand and flourish like never before. Because the recovery period has ended, the focus is again on further economic growth. Many companies are taken over by large international chains (conglomeration), but there is also room for new niches. Both travellers and businesses feel unrestrained in their behaviour. All this causes an overstrained visitor economy, heavier ecological pressure and negative social impacts. Both the positive and the negative consequences of traveling continue unabated. The mutual distrust of, and fear between, countries within the EU and beyond has sharpened relations. This has led to the reintroduction of border controls in the EU and stricter border controls outside the EU.

Guiding principle: focus on back-to-business and growth, just as before and as soon as possible.

Visitor: nearly the same type of visitors as before, with the same behaviour; the same hotspots overloaded; more and more often traveling; a lot of air traffic; unlimited wanderlust; delays due to travel restrictions.

Market: same markets of origin as before; in terms of size markets have quickly stabilized since the crisis; many businesses, especially family businesses, are unscathed by the crisis through a combination of their own creativity and help from governments; ongoing globalization; large international companies and corporations dominate the market; the complexity of the large international corporations makes them vulnerable to new disruptions profits go to shareholders.

Key issues: focus on numbers; mass tourism; discussions about tourism and social impacts flare up again, as well as discussions about the increasing negative ecological impact; possibility of a return of COVID-19 has impact (1.5-meter economy); border controls; employment in the sector is growing further; distributing employment growth appropriately in time and space; more businesses work with flexible shell of workers to quickly get rid of them in case of new outbreaks (to limit fixed costs).

Strategy: strong commitment to recovery offensive; growth and profit maximization; crowd management and crowd control; strong focus on mass and security; border control.

Risks: too few lessons learned; financially the sector is still vulnerable and non-robust due to little (financial) buffer capacity; recovery offensive too successful; stressed visitor economy; over-tourism hot topic again; scaling up of companies have made them 'too big to fail' and very costly to let them survive in times of crises (cf. KLM-AirFrance, Booking.com).

Values: The values associated with man who dominates over nature remain intact (nature only has value if it can be used by man, nature is feasible, nature is at the service of man); the human-animal relationship is maintained; wildlife trade and exploitation of animals for profit in tourism remains commonplace, despite recurring discussions of ethical and moral dilemmas.

Scenario 2: Survival of the fittest – *visitor economy collapsed*

Citizens continue to hold on to their "right" to vacation to faraway places, which means that the need for travel remains strong. However, the economic recession makes it financially impossible for most people to meet that need. Because people are not able to visit far places (financial and national borders), they are looking for alternatives in and around their home / home country. The sector remains rigid in its approach. The battle for the reduced number of holidaymakers is expressed in fierce competition. Many airlines (especially low-cost airlines), tourism related businesses and catering businesses have gone bankrupt. This even goes for vital companies, because they have constantly put their money into new investments. A few large investors and players dominate the scarce market. In order to prevent over-restructuring in the sector, to prevent fragmentation and still maintain a minimal supply for its own citizens, governments have nationalised important vital players such as national airline companies, national railway companies, but also a number of hotel, bungalow and camping chains have been taken over by the national governments (state-owned companies: in the past, certain holiday parks belonged to unions ...).



Guiding principle: survival strategy; take what you can get.

Visitor: a large share of nearby markets; market split between rich and poor, and haves and have nots. Emergence of permanent guests.

Market: same markets of origin as before, but considerably smaller in size; low-frequent travel; tourism is luxury good; financial losses are compensated with public money (socialized costs); emerging local leisure and hospitality concepts replace former ones.

Key issues: costs of recovery operation are substantial and are recovered from the citizen proportionate to their financial capacity; markets have become smaller; acquisitions of large players by governments; large unemployment in the sector causes additional uncertainty among entrepreneurs; mistrust among entrepreneurs regarding cooperation with other entrepreneurs (competition, no con-colleagues).

Strategy: profit maximization; competition for the scarce visitor; consumer engagement is crucial for customer loyalty.

Risks: competing on price instead of quality, which has made the sector very vulnerable; emergence of a few big winners (wealthy, large players) versus many losers; major restructuring and reorganization; organizational fragmentation due to mutual distrust.

Values: nature is used for tourism and threatened by overexploitation; in tourism animal welfare is low on the agenda, making money is the most important thing; nature's primary value is to make money with; wildlife trade continues despite threats to public health.

The long recession has forced the holidaymaker to meet his holiday need in a different way. Governments, companies, knowledge institutions and citizens (quadruple helix) have joined forces to help to meet this need as much as possible. The parties all contribute with knowledge, subsidies, expertise and manpower. "Under pressure everything becomes liquid" is a saying that also makes its mark here. Creativity flourishes and numerous innovations ensure a total revolution in tourism, both in terms of products and services and in terms of revenue, exploitation and management models. It represents a fundamental break from the past. It is the era of high-tech tourism that is accessible to anyone who needs it. The visitor economy gives rise to the local and regional value and production chains with legal entities such as the cooperative as a 'renewed' exploitation model, providing purpose for society and a focus on circular production.



Guiding principle: the progress of a fundamental transition.

Visitor: new type of tourist and guest; purpose is central to the guest; digital; mixed reality; conscious "quality tourist"; relatively few in number; relatively well-spent; more aware of relationship with nature, renewed values which is expressed in, for example, more attention to animal welfare; relatively low in ecological footprint.

Market: new forms of tourism (e.g. eSports, VR and MR tourism); meaningful hospitality offering with local and regional circular products; large share of domestic tourism and day recreation as a result of conscious and local consumption; relatively small in size; new business types also VR); dynamic 'young' sector.

Key issues: recovery costs are substantial and are recovered from the community (or: are raised jointly by parties); companies need to go through rigorous changes, not just adapt but change thoroughly; traditional companies miss the boat and disappear from supply (bankruptcies, shifts to other sectors); governments takes greater role in exploitation.

Strategy: quadruple helix; creativity and innovation; new products, services and revenue models; value-driven instead of profit maximization; commitment to tourism in line with authenticity / sense-of-place / DNA for high-quality and credible offerings.

Risks: laggards who cannot keep up with development (read: generations before GenY); a lot of temporality / high pop-up character of activities.

Values: attitudes towards nature and others have changed; stakeholders in tourism realize that living respectfully with each other and with other life on Earth is important for the health of the entire planet; a transition to regenerative tourism has started, aimed at achieving positive changes in society, rather than minimizing negative effects of tourism; damage to nature is reduced, nature is given more rest in certain places and moments to recover.

However short, the recession has opened the eyes of the tourist. Realization has grown that globalization and the international travel that is annexed to it has largely contributed to the spread of COVID-19 and to the recession. The holidaymaker has become more aware of the consequences of his travels and is taking more conscious and responsible choices based on transcending values. There is a need for a purposeful products and services. Consumers are choosing purposeful and destinations close by, dampening the unrestrained growth of pre-crisis international tourism. To make safe and responsible choices, he relies on reliable (scientific) information. The traveller has no problem with the fact that this information has been obtained through careful monitoring of his behaviour, among other things, knowing that this benefits the traveller, the community and the destination.



Guiding principle: rapid adaptation / quick fix, responsible tourism (reconsideration, discipline).

Visitor: conscious intrinsically motivated consumer; well informed; sustainable; aware of (local) impact; looking for synergy; aversion to chains / TCNs while attracted to the local; relatively many in number; more staycations because holiday makers have increased awareness of air pollution and realize that nature close to home gives a sense of belonging, has a positive effect on people's well-being and stimulates social contacts and cohesion. As a consequence own living environment and own country as a holiday destination are revisited.

Market: proximity tourism, mainly domestic tourism and day recreation; relatively large in size; air traffic has recovered somewhat, but kerosene taxes and higher taxes are putting pressure on demand; weaker companies have gone bankrupt; wealthy companies are adapting products to new market needs and are experiencing growth because of a lack of competition; regional and local pearls dominate the market.

Main issues: focus on quality; vulnerability (resilience) of the visitor economy; employees remain loyal to the sector; deglobalization to ensure supply; implementation of sustainability in companies and mobility; closing of local / regional chains; circular economy; paying more attention to human and animal welfare in tourist destinations and reducing negative effects

Strategy: rapid adaptation of companies; monitoring; clear choices by entrepreneurs: they implement concepts 100% without concessions; stimulating repeat visits by offering optimal experiences.

Risks: negative consequences for society and the environment; privacy issues (big brother); demand exceeds supply, which results price increase of the best and most popular places.

Values: growing awareness that man is part of nature, and nature is part of man, that not everything is controllable; that living together with each other and with other life on earth with more respect is important for the health of the entire planet. Virus has taught people that we are a community (social capital).

Each out of the four scenarios provides a plausible picture of what the visitor economy might look like in 2025. Please note: what it might look like. As noted in the introduction, the scenarios presented are neither predictive, nor goal-based, but explorative scenarios. Because they are not predictive scenarios they are not designed to state or predict what will happen. Because they are not goal-based scenarios, we cannot choose one and derive a strategy or action plan from it to shape the future. Instead, the scenarios are explorative scenarios. Each scenario explores a different probable, plausible future perspective of the visitor economy.

The uncertainties that form the basis for the scenarios are subjective. Different parties - entrepreneurs, governments, financiers, DMOs - may see things differently. What is predictable for one is unimaginable for the other. What seems as clear as a lump to one person is a great uncertainty to the other. That is why a conversation between those involved is important. To share knowledge and insights, but also to learn from each other and discover that there are other ways to look at the world around us. After all, each of us has developed a dominant way of thinking and solving problems, which sometimes prevent us from looking at our environment with different eyes.



The scenarios are also a snapshot. Although they take future developments into account, our view of what may happen in the future may change from time to time. Because our insights change, because new developments are imminent, because a major event may occur, because an important new innovation has been brought about, because the next disruptive force is emerging, because... you can fill this in yourself. It is therefore important to continuously monitor and try to understand early signals of new developments in the complex force field impacting upon the visitor economy. Then, the scenarios can be regularly calibrated to those new expectations and possibly adjusted. The adapted scenarios can be used to test the existing strategies and measures for robustness and resilience, but they can (therefore) also be used to change or renew the policies and strategies. This requires adaptive capacity and contributes to greater resilience of developments that may come our way in the future.

When we see the scenarios as probable, plausible futures, we realise that they provide insight into the possible playing field of tomorrow and that they can help us to prepare for such a playing field. Moreover, when we understand that the future may contain elements of each of the scenarios, together they can inspire us to develop strategies and actions to prepare us for all possible futures.

Organisation: mobilise your network and take the following steps

In this study we have outlined four scenarios for the future of the visitor economy in 2025. We see this as a first step in talking with representatives and stakeholders of the visitor economy - from governments, businesses, trade organisations, financial institutions to DMOs - about the value of these scenarios and how to develop them into usable future perspectives that extends beyond the short-term solutions that dominate the media today.

Inspiration: immerse yourself in the forcefield and the scenarios and let them inspire you

It would be good to delve into the forcefield and into the scenarios. How do you position yourself? Does it fit your view of what could happen next? Do you consider the scenarios plausible? Why yes or why not? You could engage with colleagues and other stakeholders to compare and discuss your perspective with the views of others. You may come to the conclusion that the scenarios can be tightened or otherwise adjusted in certain areas. If so, we would like to hear from you.

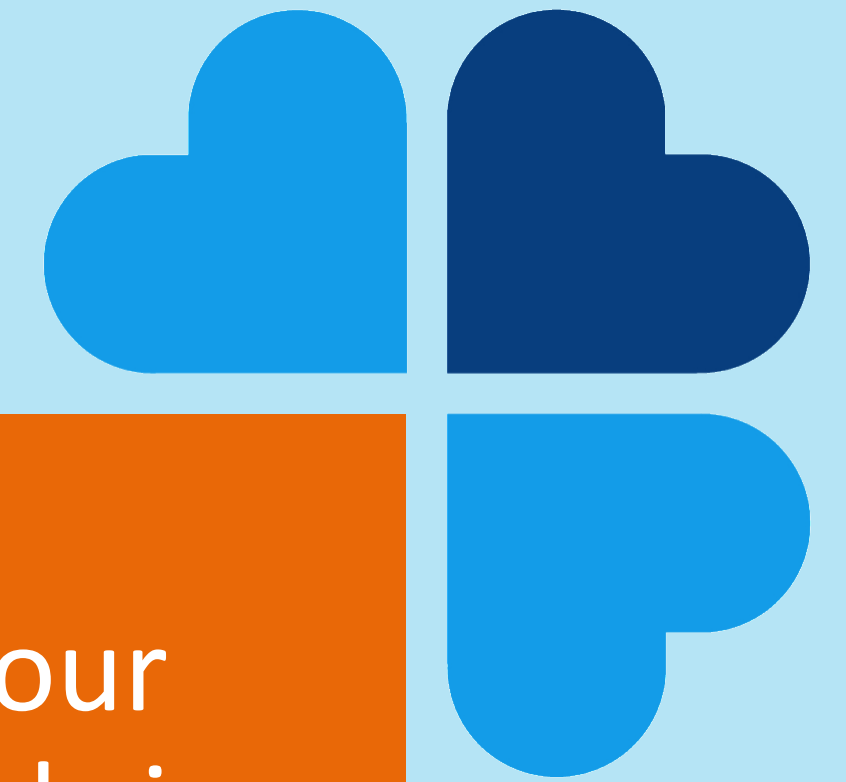


Tooling: apply the forcefield and scenarios to your business, your organisation, your sector or destination, and identify the possible consequences.

While the scenarios are not hard-nailed predictions and are based on subjective assessments of the world around us, they can be perfectly used to review your current business or organization, your policy, sector or destination. What fits, what does not fit? Why? What are the possible consequences of this? What can or should you do to be able to anticipate such developments? Would that be feasible? What risks do you run if you do or don't do that?

(Re)orientation: use the scenarios as a source of inspiration for creative and innovative renewal

You can use the scenarios to use as a source of inspiration to creatively and innovatively reinvent your business or organization, your sector or destination, to review your policy, or to look for support measures. It may result in a new concept, a new revenue model, new products or services, or other strategic choices that fit the requirements of the new situation. Here, too, you can ask yourself whether such an idea fits into the future context outlined in the scenarios; whether it fits the goals of your organization / company and is accepted by shareholders and other stakeholders; whether it meets the needs of the future market; how sustainable it is in view of the economy, society and the environment; whether the idea is feasible, not only financially but also in terms of, for example, manpower and competences; what risks you may run; and whether your idea can be quickly scaled up or down when market conditions or beyond force you to do so.



CELTH facilitates the process to proceed with developing the scenarios to a next level and is looking forward to supporting your organisation with tackling the challenges that the current crisis brings about.

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