Shaping Tourism Futures®

AIEST Consensus
on tourism and travel in the SARS-CoV-2 era and beyond

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Abstract

On the occasion of the AIEST Anniversary Conference 2021 in Lucerne, Switzerland, and based on a simplified consensus discourse methodology, we - that is the conference delegates - collaboratively assessed possible future developments of tourism against the backdrop of the Covid-19 Pandemic. The focus was on four questions: (Q1) "How will future demand develop, regionally and internationally?", (Q2) "Which developments from outside the tourism system will (a) provide opportunities or (b) pose challenges for tourism respectively?", (Q3) "Which developments from within the tourism system will (a) provide opportunities or (b) pose challenges for tourism respectively?", and (Q4) "Which would be meaningful future research avenues?". This paper reports on the results and outcomes of that discussion and provides answers to the questions posed.

Keywords: Consensus, SARS-CoV-2, Covid-19 Pandemic, tourism, future, impacts

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CONTENT

1 Introduction

The AIEST (Association Internationale des Experts Scientifiques en Tourisme; Association of International Scientific Experts in Tourism; the oldest expert organization in tourism) celebrated its 70th anniversary in Lucerne in 2021. Besides an open international competition on "Fresh ideas for sustainable tourism development" among younger tourism scholars and practitioners and a historical review of 70 years of AIEST history (all available at https://www.aiest.org/news/70th-anniversary/), we – that is more than 40 conference delegates - collaboratively assessed the future development of tourism against the backdrop of the Covid-19 Pandemic.

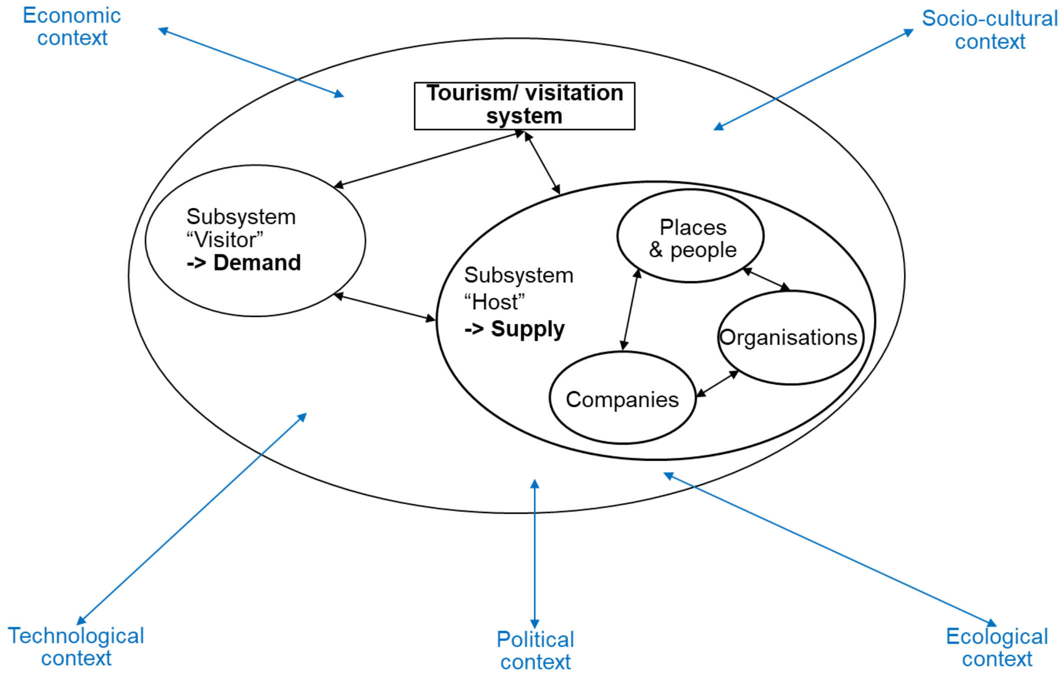
The pandemic has caused not only medical but also economic and social devastation worldwide, and at this point it is still unclear when this crisis can be declared over. Tourism and all those who make their living from this phenomenon have been particularly affected. For this reason, the AIEST has been involved in early and repeated joint reflections on how to deal with this pandemic, as well as its impact and future prospects, by means of the following reports:

- The response of governments vis-à-vis the economic ramifications of SARS-CoV-2 (April 4, 2020)
- The response of tourism businesses vis-à-vis the economic ramifications of SARS-CoV-2 - Opening intellectual and real avenues for innovations (April 18, 2020)
- (Immediate) future of tourism in the wake of relaxing SARS-CoV-2 shutdowns: Small steps to a temporary new “normal” (May 10, 2020)
- The future of tourism with and potentially after SARS-CoV-2 - Continuous small steps and drawbacks towards a temporary new "normal" (September 25, 2020)

They can be found at https://www.aiest.org/news/covid-reports/.

This paper builds on these previous works and complements it with an updated perspective from September 01, 2021, along four topical questions: (Q1) “How will future demand develop, regionally and internationally?”, (Q2) “Which developments from outside the tourism system (exogenous context, *e.g.,* economic, social, ecological, technological, political) will (Q2a) provide opportunities or (Q2b) pose challenges for tourism respectively?”, (Q3) “Which developments from within the tourism system (endogenous context, *e.g.,* supply, including institutional as well as organisational settings) will (Q3a) provide opportunities or (Q3b) pose challenges for tourism respectively?”, and (Q4) “What would be meaningful future research avenues that address the issues identified?”. For a depiction of the underlying systemic approach, please refer to figure 1.

Figure 1: Systemic approach



The remainder of the paper is structured as follows: In chapter 2, we shortly present the methodology applied for this discourse, followed by chapter 3, in which we present the outcome and results and therefore answers to the four questions above.

2 Methodology

The methodology draws from a simplified consensus discourse methodology developed in 2014 (Reinhold et al., 2015), following a five-step methodological procedure (cf. table 1).

Table 1: Consensus discourse methodology

Step	Action	Purpose
1	Record of critical thoughts, propositions, and intermediate conclusions with regard to the questions asked on cards and pin boards.	Record sense-making. Support attendees' recall on topics. Avoid overemphasizing contents and discussion.
2	Interpretive content analysis.	Identify topical domains transcending the individual assessments. Stimulate vivid and critical discussion.
3	Consensus discussion with real-time commented transcript.	Discuss and substantiate identified topical domains in terms of collective interpretation. Express approval or dissent on written formulation. Vote on degree of prevailing domains.
4	Ex-post consultation on written consensus.	Collect afterthoughts, publications references, and recommendations. Qualify and elaborate the first written draft of consensus.
5	Vote on final consensus.	Express overall solidarity in sentiment and belief with the statements presented in the consensus.

Source: adapted from Reinhold et al. (2014)

In total, and for the four questions, we collected 92 notes, written by 28 present and actively contributing conference participants. Discussions in the 90-minute consensus session dealt with the questions posed; we subsequently summarized the notes to form 22 topical domains and a number of research questions. Consultation with all the participants – including the non-present ones - on the first consensus draft resulted in adding various publication references and close to 100 amendments qualifying or elaborating on statements in the initial draft. As a result, all participants elected to support the consensus in its final form.

3 Topics (Content)

3.1 Summary introduction

The participants agreed that in the future rather demand and partly the exogenous framework conditions will drive the tourism development, whereas the endogenous framework conditions rather pose challenges. This global judgment is based on the following more detailed considerations with regards to the four questions (Q) and their domains (D).

3.2 Q1: Future demand, regionally and internationally
"How will future demand develop, regionally and internationally?"

Q1 Overall assessment: In general, the participants agreed that demand will continue to develop positively following the relaxation of the various existing regulatory travel restrictions. However, a distinction must be made between short-term drivers (D1) and longer-term trends (D2) as well as dampening effects (D3), and with specific regard to different forms of tourism (D4).

Domain 1 (Q1D1): Short-term drivers. Short-term drivers include, in particular, (1) pent-up demand (cf. the high, albeit unevenly distributed, savings rates in developed and some developing countries; cf. Q2bD1; Vogler, 2021), (2) the rapid ramp-up of "easy" point-to-point low-cost airline networks which will again drive the number of city breaks in particular, and (3) the revival of group travel, especially for demographic reasons and the associated desire for risk minimization and reduction of complexity in a highly-regulated travel world and requiring short term information together with the desire for social interactions in a "bubble" during travel.[1]

Domain 2 (Q1D2): Long-term drivers. Long-term trends supporting demand include the following in particular: (1) work and leisure converge more and more and travel becomes an increasingly integral part of daily lifestyle (*e.g.,* the clear distinction of functional allocation of spaces and times dissipates; issues of work-life balance persist), (2) the need for stationary social encounters for meaningful interactions increases, no matter if for private or professional reasons (*e.g.,* VFR tourism becomes even a stronger driver of future travel, even more after the experiences with the pandemic), and the increased desire for sustainable travel (cf. Q2aD3).

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1 cf. grey society in developed countries and early travel-career travel from developing countries

Domain 3 (Q1D3): Dampening effects. However, there are also a number of developments that are dampening demand and should therefore be kept in mind. (1) In contrast to the low-cost airlines, the ramp-up of legacy carriers' hub-and-spoke networks is much more complex due to the interdependencies between trunk and upstream/downstream connections. The development of the intercontinental networks might therefore take somewhat longer and, due to the strained financial situation of the airlines, will also be associated at times with comparatively higher prices, dampening long-haul demand. (2) Decreases in business travel – estimates are around -20% - have an additional dampening effect. (3) Political risks (e.g., smouldering conflicts) and risks from potentially rapidly changing collective consumer behaviour (*e.g.,* rapidly changing preferences due to social correctness) should not be underestimated.[2] Add regulatory risks with national regulations that make travel more uncertain and create high opportunity costs (certification, risk of quarantines, and the like). (4) Generally, fear of travel (with the background of the pandemic) might further hamper demand. There is an argument, that at least some of the population have been traumatised by the experiences made during this time (cf. Neuburger & Egger, 2020).

Domain 4 (Q1D4): Forms of tourism. At least in a European context, we will therefore and for the time being most likely see less intercontinental visitors and less business travel. Cruise tourism might come under increased exposure and pressure due to environmental concerns - should these then really materialize in a change in demand behaviour. In contrast, participants expect (1) a continuously higher share in regional and domestic demand than in pre-pandemic times, (2) a need for slowing down, exploring local culture, products, also by more individual tours, potentially resulting also in a temporary increase in the length of stay, (3) an increasing interest in remote/ uncontested destinations, avoiding crowded places and valuing nature experiences, (4) a general desire for new experiences/ living dreams especially related to nature, and shifting preferences for accommodation types securing social distance, which is clearly visible in a dramatically increased interest in camping and 2nd homes (cf. Craig, 2020; Craig & Karabas, 2021; Seraphin & Dosquet, 2020).

Domain 5 (Q1D5): Conclusions. Developments described above suggest that we are in the process of a significant shift in demand which is not a disruption but rather a strengthening of existing trends. However, this stipulated shift in demand is based on an exploration of observations made in the immediate past. Counterarguments to this can be easily found: (1) human behaviour is persistent and sticky and will not change without necessity, (2) people have travel “in their genes” (cf. Crouch, 2013) and will continue to explore and discover

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2 Although, for example, the high growth rates of (ultra) fast fashion indicate that all responsibility and costs are to be shifted to the producers, revealing the extent of hypocrisy in the domain of fashion production.

new frontiers, (3) the various sectors or industries earning from the phenomenon “tourism” will do their best to win back lost business, and (4) travelling is a superior good that with the increase of wealth and income (especially in emerging countries) will enjoy high demand growth. Regardless of whether or not we will see significant changes in demand patterns, two things can be said for the future: (1) In general, heterogeneity in behaviour will tend to increase due to the increasingly different travel contexts. (2) This opens up opportunities for targeting; this was shown not least by various contributions and their discussions with regard to visitor flow management at this year's AIEST conference.

3.3 Developments outside the tourism system

"Which developments from outside the tourism system will (Q2a) provide opportunities or (Q2b) pose challenges for tourism respectively?"

Q2 Overall assessment: In general, the participants agreed that the exogenous framework of tourism will be very challenging to negative, however still also provides a number of potential opportunities. We shall discuss opportunities first, before topicalizing the challenges.

3.3.1 Q2a: Opportunities

There is a multitude of **opportunities** from the exogenous framework of tourism.

Domain 1 (Q2aD1): Economic. The economic growth in Asia and the increase in the affluent population in Asia will create many opportunities for different types of destinations and service propositions, provided political risks (cf. Q1D3) will not hamper the exploitation of those opportunities.

Domain 2 (Q2aD2): Lifestyle. Four subdomains are worth mentioning. (1) The ongoing trend to individualism (at least in the Western world) creates many opportunities for highly specialised offers (cf. Q1D5). (2) The mega trend "health" and increasing health and medical tourism is one of the proxies signalling individual/ personal optimisation. (3) In addition, the convergence of space and time for work and leisure as well as different work-models that enable flexible travel and work, creates new opportunities for long stay forms of tourism. Second home ownership combined with progressing digitalisation (access and services) might additionally propel such a development. (4) In conclusion, lifestyle "activists" might connect to second and third places in such a way that they might even become investors in tourism ventures.

Domain 3 (Q2aD3): Sustainability. From the global pursuit of sustainability and related agendas - including international policies and treaties - comes a multitude of opportunities for new products (with potentially higher willingness to pay) and processes. Such a push comes from younger generations in particular, a generation apparently more concerned about environmental and social aspects (cf. Q1D3). However, the major sustainability concern associated with fossil fuel -powered transportation remains unresolved; most means of transport are still non-sustainable (cf. Bursa, 2021; Bursa, *et al*., 2021; Gühnemann *et al*., 2021; Mailer *et al*., 2019; Unger *et al*., 2016). This is why in the future sustainability efforts should increasingly focus on the decarbonisation of transportation.

3.3.2 Q2b: Challenges

But on the other side of the coin, there are also, there are also numerous **challenges**.

Domain 1 (Q2bD1): Economic. There are two challenges related to the economic framework. (1) Rising inequalities – on a national as well as on an international scale – in terms of income and wealth distribution might result in a decrease of the travelling population (cf. Q1D1; Mian *et al.,* 2021). (2) Inflation - beyond short-term price adjustments due to disrupted supply chains and other temporary shortages - either decreases real purchase power and/ or results in interest-raises with costs (*e.g.,* mortgages) likely crowding out other types of expenditures (such as for travel).

Domain 2 (Q2bD2): Government regulation. Governments have "learned" in the course of the pandemic that they can "successfully" regulate and nudge individual and collective behaviour and thus intervene deeply in the decision-making autonomy of individuals and companies. Government-induced constraints (sticks) have been compensated with money (carrots), creating a strong interdependency between governments and their subjects.[3] There will be concern that this governmental regulatory activism might continue in other domains, including tourism-related ones, such as (1) mobility (*e.g.,* attempts to change the modal split (cf. Gkiotsalitis & Cats, 2021; Zhang *et al.*, 2021), up to hard travel and mobility restrictions (cf. Seyfi *et al*., 2020), (2) spatial and zoning planning (*e.g.,* use of building stock for resident vs. transient individuals), (3) sustainability issues (in operations to system-wide ones), (4) taxation (*e.g.,* fuel, tourist tax, CO2-tax, etc.), and other. Follow-up costs and market distortions are to be expected.

Domain 3 (Q2bD3). Self-regulation by sectoral and industrial bodies. The sustainability push (cf. Q2aD3) but also other domains raising interest of central “steering” offer a wide array for corresponding self-regulation within industries (*e.g.,* adaption of accreditation systems towards sustainability issues).

Domain 3 (Q2bD4): Bureaucracy. With increasing regulation (government and self-regulation) comes bureaucracy, where in most countries one misses coordination and cooperation in policy making and regulating processes. This is especially harmful in areas such as investments in general and investments in public spaces in particular, where bureaucracy might actually lead to an investment backlog.

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3 Some would cynically argue that governments have not just poured big money on pandemic-related problems.

Domain 4 (Q2bD5): Infrastructure. There is concern that in some countries, at least for the foreseeable future, there will be a divide in the quality and quantity of digital infrastructure between urban and rural areas. There is also concern that increasing cyber-attacks could lead to a dysfunction of important infrastructures such as transport, energy supply, and health, but also in other digital domains, which could lead to a reluctance to make use of digital potentials overall. Tourism, as a stereotype of an information business, would be particularly affected.

Domain 5 (Q2bD6): Ways of thinking. The social media driven bubbles, coupled with a dogma-driven decline for understanding different rationalities and thinking patterns, are making the discourse around important and major challenges, such as climate change, increasingly difficult (cf. Lewandowski *et al*., 2017). In the best case, one has different stakeholders with their agendas having difficulties talking with each other. In addition the pandemic leaves societies in many countries with even wider divides between poor and rich, liberal and etatists, healthy and fragile people.

Domain 6 (Q2bD7): Political risks. Political risks are not to be underestimated; this holds especially true with regard to the increasing number of conflicts between the Western World and other civilisations not sharing “Western” values.

3.4 Developments within the tourism system
"Which developments from within the tourism system will (Q3a) provide opportunities or (Q3b) pose challenges for tourism respectively?"

Q3 Overall assessment: In general, the participants agreed that the endogenous framework of tourism will be very challenging, providing – in comparison to the challenges - just a small number of potential opportunities. We shall discuss opportunities first, before topicalizing the challenges.

3.4.1 Q3a: Opportunities

Domain 1 (Q3aD1): Digitization and Innovation. The advanced possibilities of digitization are opening up new potential for innovation in general and for digitizing (1) processes and (2) business models - increasing productivity and margins respectively - in particular (cf. Breier *et al*. 2021). For instance, backstage/back-office processes bear obviously great potential for digitization. But digitized interaction processes on the front stage (*e.g.,* by self-service technology or even robotics) can also create value - also for the customer (*e.g.,* saving time). In terms of business models, virtual closed ecosystems that jointly control revenues and costs and therefore internalize margins can also be increasingly considered. This results in more business-driven forms of cooperation and opens potentials for sustainable improvements of the financial statements of the parties involved.

Domain 2 (Q3aD2): Foundations for adaption and change. Tourism and hospitality actors are often accused of a lack of will for change and a lack of agility. In fact, in the wake of the crisis, many have proven somewhat resilient, albeit with financial support to compensate for business closures. Digitalization, together with demographically driven succession planning and trust-building mechanisms by means of cooperation (*e.g.,* by joint business models and learning processes), are opening up new paths of thinking and action.

Domain 3 (Q3aD3): Impulses from the market. Various developments in the market (cf. Q1) are creating new opportunities. These include (1) the increasing convergence of work and leisure in terms of time and space, (2) the broader understanding of a destination as a living space for equally the resident (locals) as well as transient (visitors) population, (3) new mobility concepts (*e.g.,* MaaS; mobility as a service) and mobility as an important mechanism for integration across space.

3.4.2 Q3b: Challenges

However, there are numerous **challenges**.

Domain 1 (Q3bD1): Availability of appropriate financial resources. There is no doubt that the pandemic has devastated many profit/ loss-statements and balance sheets of tourism and hospitality companies. After having been able to secure at least temporary liquidity through credit programs in many countries, most companies are now facing the challenge of repaying those loans and aids, replenishing their liquidity reserves and securing their medium-term solvency and medium- to long-term investment capability, in order to renew their hardware. The equity capital lost as a result of the crisis will only be recovered very slowly due to the generally rather low margins, which is why new and maybe innovative financing instruments will have to be found. For the foreseeable future, the low interest rates worldwide, may alleviate this problem to some extent, as there is a continuous high demand for asset-secured cashflow-generating investment opportunities.

Domain 2 (Q3bD2): Availability of appropriate human resources. The pandemic has made many employees in tourism and hospitality aware of the fragility of their jobs. In general, tourism and hospitality - at least in the developed countries - has to some degree lost its attractiveness. The result is an increasing shortage not only of people but also of skills and knowledge. The scarcity is greater the more qualified the job profiles are. High potentials with high labour productivity are therefore difficult to recruit. Processes with mainly manual activities, on the other hand, are often not productive enough to bear the minimum unit labour costs. In the future, it may no longer be sufficient to recruit people for specific activities and processes, but rather to design processes and activities (in terms of content and associated productivity) in such a way that the "right" people can be found. Tourism and hospitality will or might hereby serve as a job entry track for migrants (Janta *et al*., 2012).

Domain 3 (Q3bD3): Sticky "state of the art". In tourism, we continue to see a high path dependency, due to (1) the high tangible (*e.g.,* financial; cf. sunk costs) commitments[4] and (2) emotional involvement of the various actors, resulting at least in part in a loss aversion[5], and (3) a high degree of traditionalism and institutional inertia. Resistance to change or adaptation is therefore high. Hence, there is a high probability that many actors will continue

4 … resulting in "sticky" infrastructure. This is especially problematic in domains, where investment cycles are getting shorter, such as in domains of digitization/ IT and interior design.

5 This loss aversion is reflected, *e.g.,* in what we would call "sticky preferences", "incapacity for thinking out of the box", "narrow-mindedness", and the like. Loss aversion might also often result in a perceived lack of entrepreneurship.

as far as possible with the pre-pandemic touristic world (it is too easy to go back to the known normal) instead of fundamentally thinking about perhaps more sustainable alternatives - and here we explicitly mention not only the ecological but also the economic and social ones.

Domain 4 (Q3bD4): Some future developments. First, in times of rapidly changing and increasingly differentiated needs, investment cycles are also becoming shorter. Because of that, there is a potential systemic lack of appropriate infrastructure (cf. Q3bD3), which will need to be eased by investment-bound capital injections. Furthermore, out of the box thinking will be necessary to understand the “business” rather from an extensive customer process (which might include more domains than just typical tourism ones) than from a supply perspective (cf. Q3aD1). For that, an extensive understanding of cooperation[6] – as a potentially wide ranging means – will be necessary. Second, data on the phenomenon of "tourism" is only available in scattered form, with a few, having a comparatively better, but proprietary overview. These include, for instance, corporations like Google due to its search functionality and its Android operating system allowing to track movement patterns, various OTAs due to search and booking functionalities, or credit and telecom companies due to transaction and interaction functionalities. This shortcoming will have to be solved by common regional or national data infrastructures.

6 Combining horizontal, vertical and lateral ones.

3.5 Open questions worth investigating

Based on the considerations around the upstream discussion, a number of open questions emerge which could/should be addressed by the research community in the near future. We present these in the form of a list of individual questions with additional comments wherever appropriate. Note that analytical as well as conceptual and engineering questions may be of interest.

(1) What is/ constitutes tourism in times of convergence of work and leisure (*e.g.,* workation)?

(2) What new tourism forms emerge from the convergence of leisure and business travel (*e.g.,* “bleisure”)?

(3) In the light of the experiences made with remote communication: How does the future of the MICE industry look like and what business models could support the re-emergence of this industry?

(4) What determines resilience of tourism systems, such as destinations? How can management of companies as well as institutions and politics as well as academia contribute to an increased system resilience?

(5) Which paths and possible actions are there to achieve climate neutrality from tourism? Or at least “greener” and “softer” tourism”?

(6) Which pre-existing institutions drive/ shape path to sustainability

(7) How can tourism best serve as a testing field/ area for
- which sustainable policies and actions?
- equality, inclusion, diversity?

(8) What is “impactful” tourism and forms of tourism and how do we best measure “impactfulness”?

(9) Government owned airlines: quo vadis?

(10) What potentials are there with “new” groups of workforce, such as migrants, pensioners, etc. and how can that new workforce be best accessed and recruited?

(11) How do processes need to be adapted in order to be staffed with a less qualified and potentially very casual workforce?

(12) What could be alternative means/ forms and processes for tourism related investments in times of challenged balance sheets?

(13) What constitutes “ideal” digitization of processes, business models and customer journeys in an information-intensive environment such as travel?

(14) Wanderlust vs. homesickness? What constitutes travel revenge and travel fatigue?

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