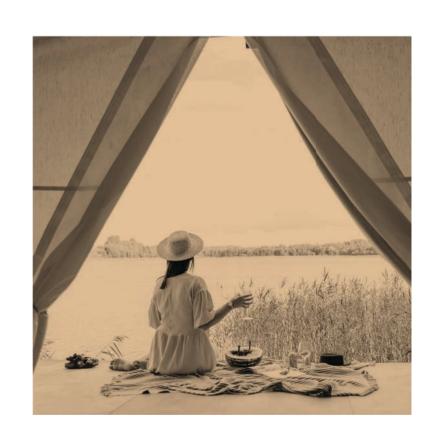


From Corona to the Future

TRENDS AND SCENARIOS FOR THE FUTURE OF THE TOURISM SECTOR - AND HOW TO TURN KNOWLEDGE INTO FUTUREPROOF ACTIONS



 19^{TH} OF NOVEMBER 2020 INNOVATION NORWAY / VISITNORWAY KICK-OFF

COPENHAGEN INSTITUTE FOR FUTURES STUDIES





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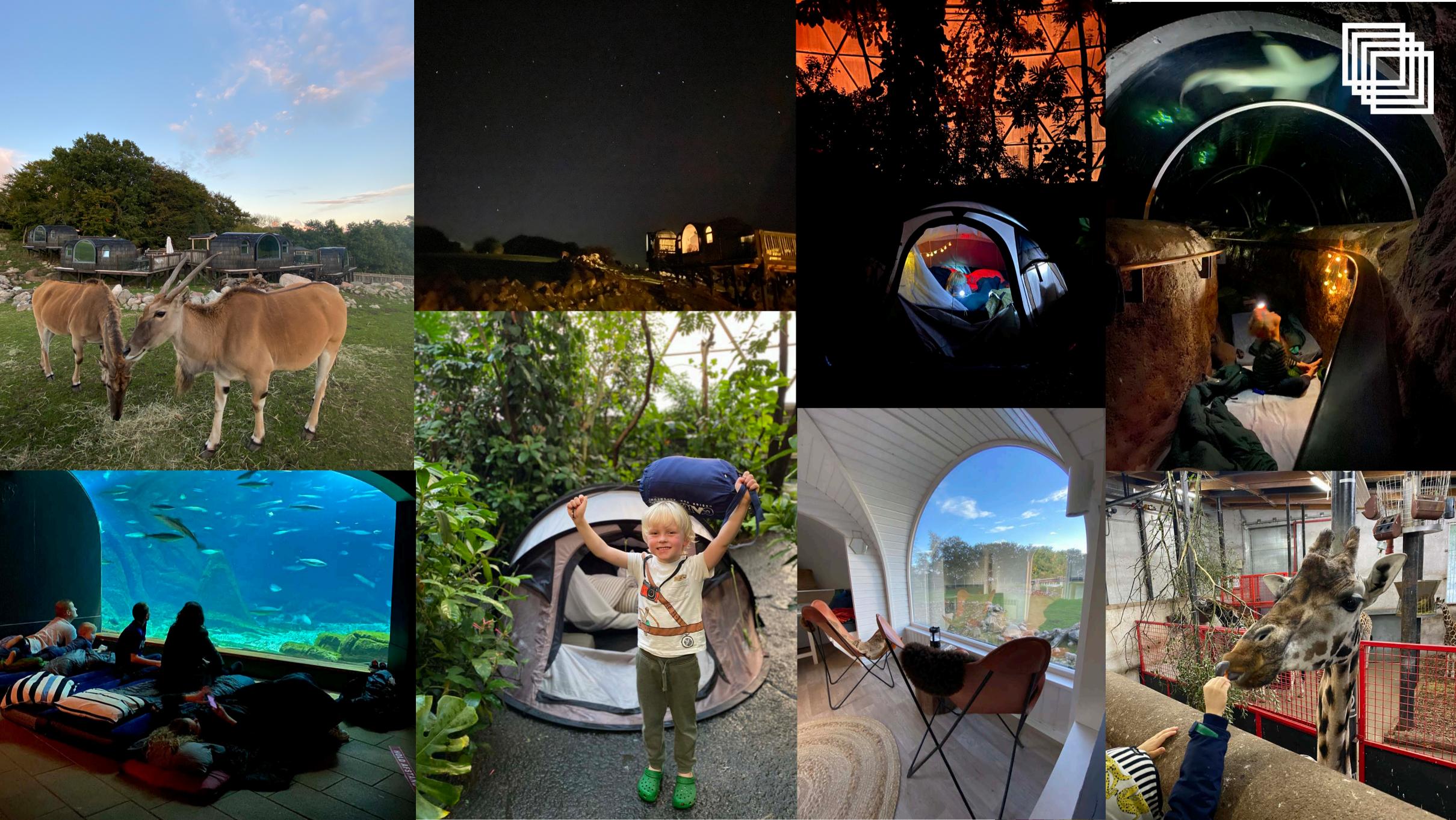
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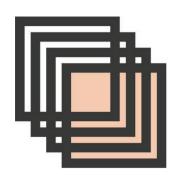
Agenda

Prepared for INNOVATION NORWAY

Prepared by
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- **05** About CIFS
- **06** Our view on the futures
- **14** Megatrends
- 24 Scenarios for the future of tourism
- **36** Reshaping tourism actions to take!

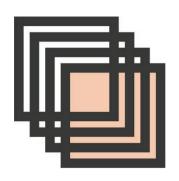




What to Expect

- Be a **part of the solutions** instead of focusing on the problems and the 'old' normal
- See the opportunities of the crisis and ultimately how the industry can build back better
- How to use megatrends to see the gaps of the future
- Get insight in 4 different scenarios for the future of tourism
- We will not look into the far future but keep it on the near future that you can use as guidelines for todays actions





A Quick Intro

The Copenhagen Institute for Futures Studies (CIFS)

An independent **non-profit, futures think tank** — founded in 1969 by former Danish Finance Minister and OECD Secretary-General, Professor Thorkil Kristensen.

Our vision is to reduce complexity, enabling decision-makers to make the best possible decisions in the present with **structured foresight** in order to overcome entrenched short-termism and inspire change and innovation.















































































What is the future?



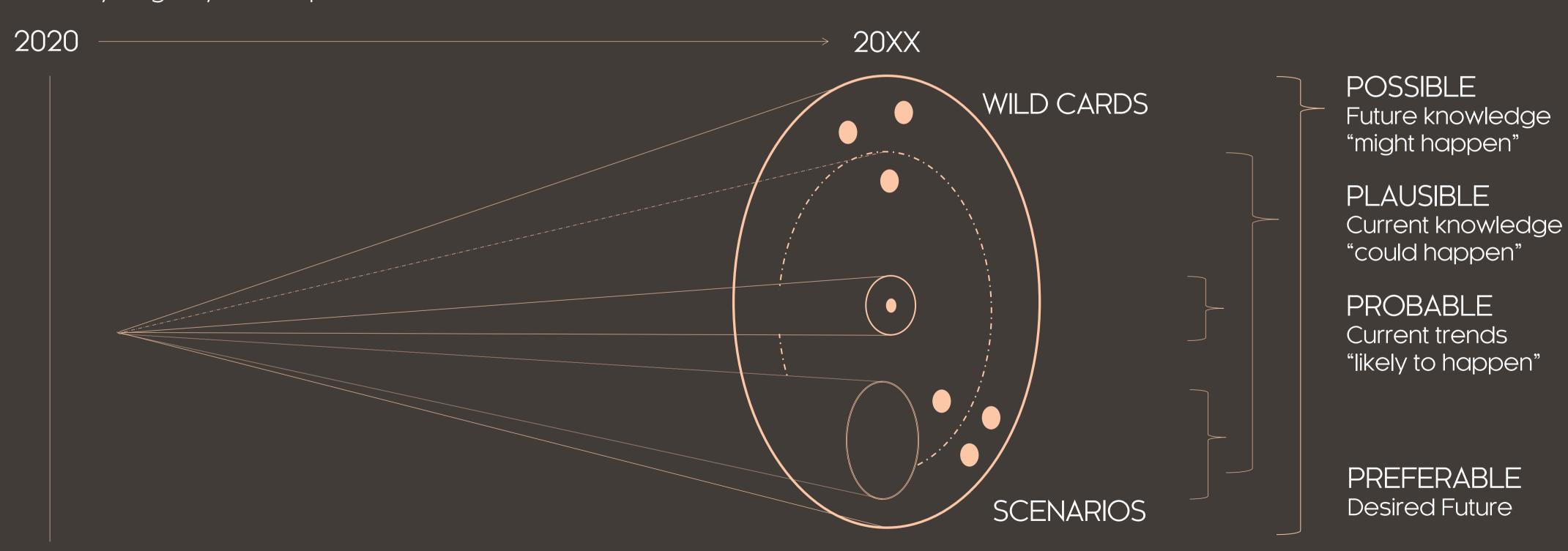
What are the (possible, plausible, probable, preferable) futures?



The Cone of Possibilities

ALTERNATIVE AND LIKELY FUTURES

Potential futures
Everything beyond the present moment





"The goal isn't predictions. It's preparation for what comes next. We must shift our mindset from making predictions to being prepared."

Technology & digitalisation









Knowledge Society



Economic Growth

Acceleration & Complexity



GLOBAL MEGATRENDS

Megatrends are major pathways of development, global in scope, and have a lifetime of at least 10-15 years.

While megatrends are expected trajectories, do not expect the development to occur linearly.



Globalisation



Sustainability

Individualisation

Polarisation



Focus on Health

Immaterialisation



Commercialisation





Network Society

Democratisation





Axis 1: Consumers

Cocooning – Fear and Travel

- Control, security and safety comes first
- No taste for adventure
- Cocooning and small and big luxuries at home
- New ways of creating experiences
- Diversity is not good
- No trust in destinations and events with many people
- Savings rate up. Consumption rate down

2021 is 2019 – Fun and Travel

- Return to normal
- Trust that companies take precautions if needed
- No need to emphasize safety
- Technology will solve any outstanding problems
- Consumption levels back to normal if people are employed
- I don't want to miss out (FOMO)



Axis 2: Globalization

Open world

- Shared responsibility for getting the world back on track
- Normal problems reemerge: US versus China, Hungary vs Brussels
- Technological solutions to control outbreaks
- Common sense solutions
- GDP rebounds
- Economic fallout is limited

Separated worlds

- The world is divided into go and no-go zones
- Restricted access, closed borders, visa restrictions
- Go zones scattered across Europe
- GDP continues to drop
- Massive unemployment





Scenarios: The future of tourism



FROM CITY TO NEARCATION

OPEN WORLD

Globalization

SEPARATED WORLDS
Globalization

BACK IN THE SADDLE

CONNECTING THE EUROPEAN DOTS/OASES

2021 IS 2019 - FUN AND TRAVEL

Consumers

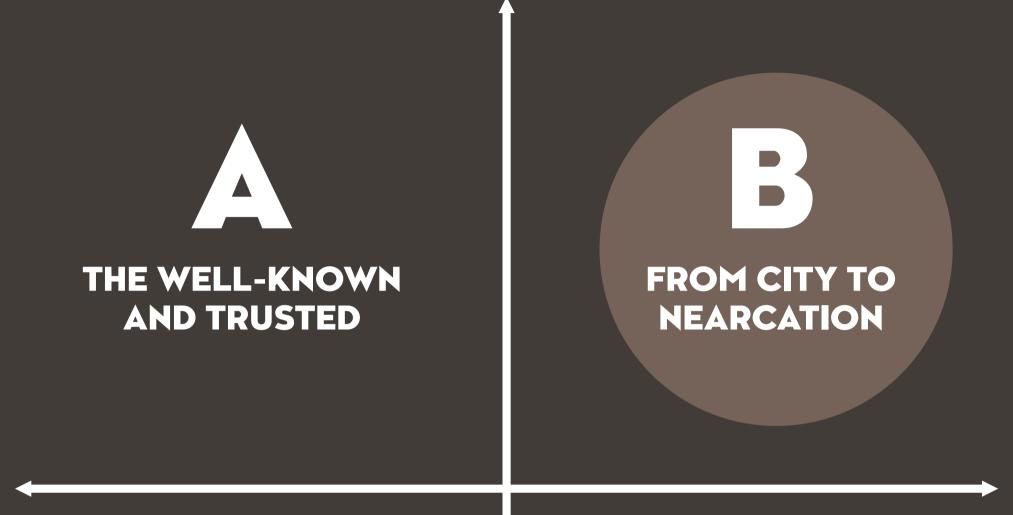




Scenarios: The future of tourism

OPEN WORLD

Globalization



SEPARATED WORLDS

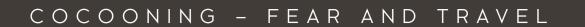
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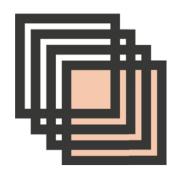
SEPARATED WORLDS
Globalization

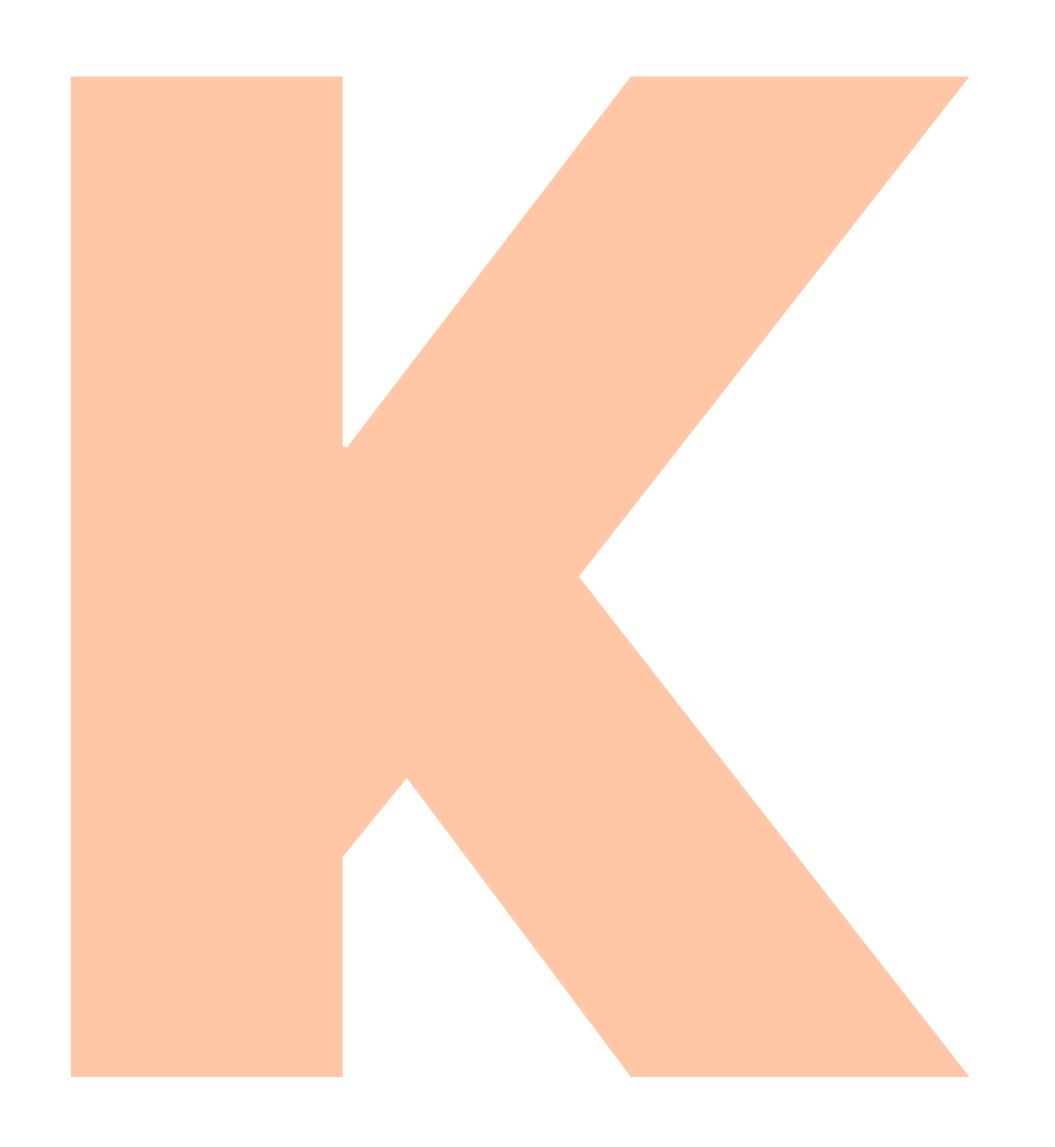


CONNECTING THE EUROPEAN DOTS/OASES

2021 IS 2019 - FUN AND TRAVEL

Consumers





K-shaped recovery

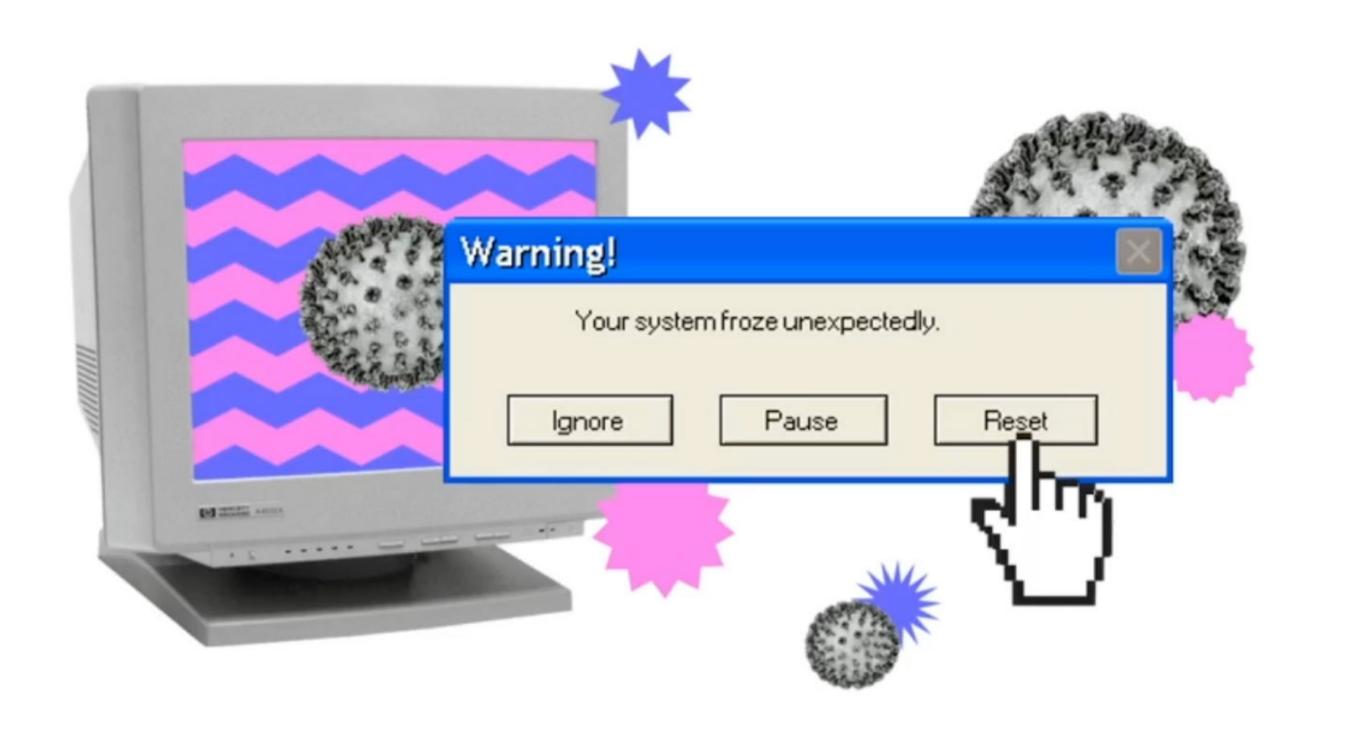
- Different parts of the economy recover at different rates, times, or magnitudes
- In the current recovery, those at the top of the "K" are experiencing a "V"-shaped recovery. For the rest, not so much.
- This will foster economic inequality, inflated assets, and a further widening of the "wealth gap" and the polarization in society.



When can we travel again?

...and what if there is no silver bullet?







How to build back better?

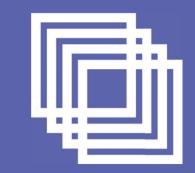




The new liquid consumer constructs his or her own **temporary and contextual identity**. Consumers no longer act as they 'should', they are **not loyal** to brands and it's about **how they behave** – not who they are. They have a **high demand for flexibility and service** at all times – and there is no more 'one size fits all'.



	CONVENIENCE	TRANSFORMATION
FOR ME	A MORE SEAMLESS ME Doing things right (convenient)	A BETTER ME Doing the right thing
FOR THE WORLD	A MORE SEAMLESS WORLD Doing things right	A BETTER WORLD Doing the right
FO	(convenient)	thing



Travel as a big potential for connecting the dots

(Locally and globally)

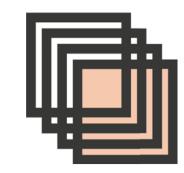












Sustainability and tourism

Post Corona we will probably see **3 consequences** for how sustainability affects the tourism industry:

- 1. Driven by fear in the short term. The linkages between low key and practical sustainability parameters will be more important. (chemicals used, pesticides)
- 2. New solutions in the long term. How can digital solutions improve experiences and reduce climate impact?
- 3. Sustainability as a megatrend continues to be important.





Remaking tourism

- Curate, connect the dots and re-brand the experiences in complete experience packages (narratives and storytelling)
- Create trust and security and enable flexibility (all over the ecosystem)
- Use technological solutions and be ready for even more focus on data and algorithms
- Keep a focus on safety, health and low touch initiaves
- Combine a better me/world with a seamlesss me/world
- Know your clients, create special experiences –
 and most important don't treat them like a number
- Enable the costumer to make clearer choices and reduce complexity
- Be transparent and honest



What comes after the hype of hyper-localism and micro adventures?



4 Takeaways

- New situations call for new focus
- Be prepared for different scenarios and make sure you have a plan A, B & C
- How can your business make seamless solutions and be flexible for changes?
- How can your business be a part of the solution? (make seamless solutions & curate a better world & a better me)
- How can your costumers be a part of the solution (create space for transformation & ensure a better world & a better me)



THANKS!

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