

A nighttime photograph of the University of Bergamo building, featuring a prominent portico with classical columns. A green level is placed on top of the building's roofline. The scene is illuminated by warm lights, and the sky is dark.

# TOURISM IN THE 2020s

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# WHY AND WHEN LOOK INTO THE FUTURE ?

- Before any crisis
- Before any long term investment
- Before becoming the victim of global competition
- In order to know the context in which we shall work and live
- In order to **build** the future instead of enduring it : future is not fate !

# 2020 : NO ASTOUNDING SURPRISE

Demand today : from those born in the  
1940s, 50s, 60s, 70s, 80s

Demand in 2020s : from those born in the  
1950s, 60s, 70s, 80s, **90s**

Supply in 2020s : major projects already  
known *ex new beach resorts in Morocco*

# ABOUT FORECASTING (1)

- No crystal globe !
- No prophet's declaration on odds
- No forecasts with figures, -extrapolations from a present situation-, ending in a « pink », « grey » or « black scenario » !  
(*what shall I do with that ? ? ?*)
- Sometimes flair of an experienced entrepreneur

# ABOUT FORECASTING (2)

- Possible for a big company ; *ex Disney*
- Difficult for an SME unless in a group or syndicate
- Relevant for a destination, small or large :
  - ✓ same context
  - ✓ same resources
  - ✓ same clients
  - ✓ same future

# ABOUT FORECASTING (3)

- Make it clear between
    - the external variables → unavoidable
    - and the internal variables → a piece of liberty
  - In this piece of liberty, fix common goals
    - Pretty easy for firms
    - Uneasy for a destination
- ➔ Forecast in tourism = find the best possible relation between supply and demand on the long term

# CASE STUDY ON FRANCE (1)

- Other « similar » case : Spain → long term quality approach
- First forecast in 1998 (for 2010) ; approach :
  - 3 main variables : tourism demand, economics and NITs
  - predictable development of each sub-sector of tourism : accomodation, transports, culture, sports, cruises, travel industry, resorts, products....
  - Documents analysis, interviews, focus groups...  
→ synthesis

# CASE STUDY ON FRANCE (2)

- Second in 2008 (for 2020), with different approach, *closer to long term planning*
- Why ?
  - ✓ Several severe crisis with strong impacts,
  - ✓ NITS largely adopted,
  - ✓ environment, a universal concern
  - ✓ fast changes in tourists' behaviour
  - ✓ tourism actors more involved in consideration on future
- More expectations from local authorities

# CASE STUDY ON FRANCE (3)

## 4 investigations

1. The exogenous variables (*unavoidable !*)
2. The endogenous variables
3. The strategies of the sub-sectors
4. The on-going long term projects and investment

# 1 – EXOGENOUS VARIABLES 1

- **The tourism markets**
  - ✓ WTO's forecasts on international arrivals : 1.5 B, more from BRIC and NEXT
  - ✓ Qualitative changes in domestic/european tourists : more mature, looking for security, good value, past and present, care for environment, for enjoyable experiences...
- **Demography** : older travellers, sharp difference between 50-75s and 75-90s, less money after 2015, many 1 person households

# 1 – EXOGENOUS VARIABLES 2

- **Economics :**
  - ✓ sharp competition for globalized firms,
  - ✓ less for SMEs but slow growth,
  - ✓ scarce investment,
  - ✓ difficulties with tourism labour
- **Environment pressure :**
  - ✓ Tourists more sensitive,
  - ✓ Climate : changes on coasts and mid-high mountains, hurricanes,
  - ✓ Biggest issue : transportation, especially long-haul journeys, probably carbon tax

# 1 – EXOGENOUS VARIABLES 3

- **More unpredictable crisis** : health, terrorism, climate, strikes, earthquakes, ash cloud...
  - ➔ spread quickly around the world
  - ➔ pb with insurance companies : uncovered risks and too high costs
- **Transportation**
  - ✓ more low cost, more train, more bus
  - ✓ less distance
  - ✓ demand for « fast and safe »

# 1 – EXOGENOUS VARIABLES 4

- **NITs easier to operate**
  - ✓ more services on smart phones : ticketing, luggage checking, guiding, itinerary, emergency help, chat,
  - ✓ Information and more reservation on the web
  - ✓ museums, beauty spots, urban areas... fitted with virtual reality and RFID/QRcodes
  
- ➔ Tourists permanently connected on internet for a growing number of services

# 2 – ENDOGENOUS VARIABLES 1

**Roughly the same products** though some will boom (ex theme parks), others will decline (ex remote rural areas), but differently sold and consumed

- **Accommodation :**

- ✓ less difference between rentals and hotels, camping sites and holiday villages... → hybrids !
- ✓ more comfort, connection, new services in the room, fantasy in decoration (Italian influence ?)

## 2 – ENDOGENOUS VARIABLES 2

Many more **destinations** around the world

- Sharp competition for old sea- and mountain-resorts with obsolete facilities
- More and more city-breaks thanks to urban resources, transports and events
- Difficulties for rural areas further than 3 hours from the big city/outgoing markets

# 2 – ENDOGENOUS VARIABLES 3

## Tourism products

- Good future for theme parks, cruises, wellness, culture, event driven products
- Unequal future for mountain- and sea-resorts, according to updating
- Niche products : adventure, zero carbon stays, trainings of all kinds, unusual packages (ex gifts)

# 2 – ENDOGENOUS VARIABLES 4

**Travel agencies and tour operators :**  
ongoing globalisation

- vertical and horizontal concentrations
- new large incoming agencies
- « à la carte » packages
- Multi-channel strategies for marketing (internet + human)

# 3 – STRATEGIES OF SUB-SECTORS ACTORS

1. Global companies (*ex Disney*)
2. Professional syndicates
3. Destination managers

Forecasts ?

Long-term planning ?

Or nose to the ground ?

# 4 – CURRENT LONG TERM INVESTMENTS

- Heavy investment requires lg term ROI
- New tourism supply for 2020 already known (ex *Guggenheim in Strongoli*) + theme parks, large hotels, marinas, nature parks...  
→ very reliable forecasts !

# SYNTHESIS

- Put together the 4 factors
- Make a coherent body on permanent and new features of tourism
- Grade these elements
- Make a difference between cyclical and structural changes

# FORECASTS TO SERVE POLICIES

- Anticipate the best possible but reasonable future
- Identify the gaps between reality and potential future = tool for development
- From forecasting to « backcasting » :  
steps to be taken and means to provide  
➔ long term planning mobilising the  
tourism actors on common goals

# SOME RECOMMENDATIONS FOR FRANCE IN 2020 - 1

- Update and upgrade the destinations
  - ✓ with modern features
  - ✓ quality
  - ✓ environment care for a sustainable development
- Give a better recognition to the role of tourism and rationalize the public actions
- Help the investment in hotels and other accomodation

# **SOME RECOMMENDATIONS FOR FRANCE IN 2020 - 2**

- Develop the events : sports, culture, business, entertainment
- Enhance the leisure activities in the evening and night
- Relaunch health tourism
- Adapt shopping in tourism areas
- Support the authentic food and wines in restaurants

# **SOME RECOMMENDATIONS FOR FRANCE IN 2020 - 3**

- Make easier the obtention of a tourism visa in non-Schengen countries
- Update social tourism
- Enhance the links between culture and tourism
- Develop the jobs and careers in tourism
- Create a real national « business community » among the tourism actors

# Thank you

- Thank you for listening
- Thank you for your questions
- And be most welcome in France !



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