

# Scenarios for New Zealand tourism: a COVID-19 response

Ian Seymour Yeoman, Albert Postma and Stefan Hartman

## Abstract

**Purpose** – A case study about the creation of four scenarios that were used to make sense of the fast-moving pace of COVID-19 and the consequences for New Zealand tourism.

**Design/methodology/approach** – Adapting global visitor economy scenarios, a set of New Zealand tourism scenarios were constructed using a “back of house Shell” method and were supplemented with an expert panel to test the reliability and validity of the scenarios.

**Findings** – The four scenarios constructed were based on two critical uncertainties, namely economic recession and the moral dilemma of the consumer. Four scenarios were portrayed using film and TV titles to help participants visualise the scenarios. Crazy Rich Asians: Recovery represented many of the attributes of tourism in New Zealand prior to COVID-19 i.e. a focus on high value tourists from Asia. Contagion: Survival of the Fittest represented the reality of the COVID-19 pandemic. This Side of Paradise: ReThinking Tourism focused on rebuilding tourism based upon the principles of sustainability. The Colony: Gated Communities represented fortress destinations trying to keep COVID-19 at bay. Each scenario portrayed several features including a unique narrative, tourism, the tourist, vision, strategy and risks. The paper highlighted the trade-offs and conflicts between the scenarios as COVID-19 unfolded in different directions.

**Originality/value** – In a fluid situation, the paper reminds readers of the value of scenarios as framing devices to understand the fast-moving pace of COVID-19 when New Zealand was in uncharted waters. Thus, this study highlights how a scenario-planning process builds resilience and foresight to help stakeholders and actors make sense of crisis situations.

**Keywords** Scenario planning, New Zealand, Resilience, Tourism policy, COVID-19

**Paper type** Research paper

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## Introduction: a New Zealand context

Soon after the outbreak of the COVID-19 pandemic in March 2020, it became clear that the entire tourism industry was suffering from the crisis (UNWTO, 2020). Governments in various countries began to put a lot of efforts to support measures. It seemed that efforts were predominantly focused on the short term to keep the damage for their economies to a minimum and to prevent businesses from going bankrupt. The fear and anxiety brought on by the pandemic was exacerbated by a lack of a clear, long-term perspective of what the future might look like.

New Zealand's tourism market, like the rest of the world, has suffered because of COVID-19. When Prime Minister Jacinda Arden decided to close the country's borders to everyone but citizens and permanent residents from 19 March 2020 (RNZ, 2020), thus in one fell swoop New Zealand's largest export market, international tourism, came to a sudden halt. Such a decision and impact had never been seen before in modern times (Gössling et al., 2020). New Zealand's response was like many other countries such as Australia, India, UK, the Netherlands, China and USA. Every country in the world imposed restrictions on international travellers and globally tourism came to a halt (UNWTO, 2020).

As an isolated island nation which promptly implemented strict border controls, New Zealand avoided many of the health consequences and deaths associated with COVID-19. As of 9 May

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2021 [1], the country had reported 2,642 cases and 26 deaths compared to 158,000,000 cases and 3,290,000 deaths globally. To put this in perspective, deaths per 100,000 people are 191.31 in the UK compared to 0.53 in New Zealand according to the John Hopkins Research Centre [2]. The impact of COVID-19 on tourism is forecasted to be a loss of up to NZ\$17.28bn compared to 2019 (TNZ, 2020). The impact on industry included Air New Zealand's profits falling from NZ\$109m in 2019 to a loss of NZ\$72m in 2020 (Zealand, 2021). Destinations reliant on international tourism, especially in the South Island of New Zealand such as Queenstown, Fox Glacier and Franz Joseph glaciers, saw huge falls in visitors and now resembled ghost towns (Houseman, 2021).

New variants of the COVID-19 have emerged, and the impacts of the pandemic are going to be long term. The New Zealand government decided that the future of tourism was going to be based upon the reporting of the Tourism Futures Task Force [3], an advisory panel of experts and stakeholders which was focused on a post-COVID-19 strategy for when the pandemic ends. But what if there was no end to COVID-19 and this became the norm for the future? Is a future beyond COVID-19 a return to what New Zealand was in 2019, or will the future be a transformation and re-imagination based upon the principles of regenerative tourism (Ateljevic, 2020; Cave and Dredge, 2020)? Will New Zealand open to tourists but then have to close once again as COVID-19 re-emerges? Questions still remain on 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 of the impact on tourism and travel.

### Purpose of this paper

Based upon an explorative consulting project between the European Tourism Futures Institute (ETFI) (Netherlands), The Centre of Expertise Leisure, Tourism and Hospitality (CELTH) (Netherlands) and Te Herenga Waka – Victoria University of Wellington (New Zealand) scenarios were constructed that ponder the future of New Zealand tourism. The scenarios draw upon the works of Dr Ian Yeoman and Professor Albert Postma scenario planning publications and Dr Stefan Hartan's research on destination resilience. In mid April 2020, a group of experts at CELTH scanned the media to identify relevant variables that may impact the future of the global tourism [4]. A review and analysis of the outcomes led to a shortlist of forces that were assumed to drive the future of tourism and travel in the medium term to 2025. The two driving forces with the highest perceived impact and the highest perceived unpredictability were used to develop four explorative post-COVID-19 scenarios of the global visitor economy. These scenarios were used to build a set of New Zealand focused scenarios supported by a local expert panel to explore the implications of COVID-19 for New Zealand and potential strategic responses. The scenarios were used as an initial test to consider the uncertainties and rapidly changing situation associated with COVID-19. Fundamentally, the scenarios allowed users to make sense of the complexities based upon unfolding events, what may happen and identifying underlying assumptions (Yeoman *et al.*, 2005).

### The importance of resilient destinations

The outbreak of COVID-19 has shown the tourism industry – in a direct, urgent and sometimes painful manner – the importance of anticipating and adapting to disruption and perturbations. Such perturbations can range from “shocks” that take place in a relatively short time frame (e.g. natural and environmental disasters, terrorism, macroeconomic shocks, new technologies, pandemics) and “slow burns” that take relatively more time to develop (e.g. demographic change, climate change, lifestyle changes). Both shocks and stresses cause perturbations that can bring businesses, industries and destinations out of balance (Hartman, 2018). Systems cope with and respond to pressure by means of adaptation, a process fuelled by the choices and actions of individual and (semi-)interdependent agents (Hartman *et al.*, 2020). Heslinga (2021) argues that “a destination which has the ability to continuously change, adapt and transform in response to stresses and tensions” can be defined as a *resilient destination*.

Resilience is understood as the ability of systems “to change, adapt, and, crucially, transform in response to stresses and strains” (Davoudi and Porter, 2012, p. 302). It takes the perspective that system states are endless and that systems are always in a somewhat restless state of becoming, by means of adaptation, co-evolving continuously due to interactions with other systems (Hartman, 2018). Basically, destinations that are driven away from the business-as-usual scenario from the impact COVID-19, as agents adapt to changing circumstances, they will never fully return to business as usual as the tourism economies are scared (Barrett et al., 2021). Thus, the future will contain traces of multiple if not all scenarios, creating new system states that may over time as agents keep adapting and fundamentally differ from pre-COVID-19 situations.

## Types of scenarios

There are many types of scenarios (Schneider and Rist, 2014). These can be subdivided into three major types: goal-oriented, predictive and explorative.

### *Goal-oriented or aspirational scenarios*

In response to the industry’s call for help, authorities have presented alternative strategies or roadmaps to get out of the crisis or keep the negative implications as small as possible. Such scenarios are normative and are called goal-oriented or aspirational scenarios (Corry, 2020). They give alternative visions of the future and how they can be achieved. They refer to *what should happen*, the future we want and usually cover a period of three months to ten years.

### *Predictive scenarios*

To provide the authorities with proper information, institutions such as the Robert Koch Institute in Germany make forecasts of the expected development of, for example, the number of infected citizens and the number of admissions to ICU departments in hospitals. These so-called predictive scenarios are linear projections or prognoses based on statistical analysis of historic data and extrapolation by means of statistical models (Amer et al., 2013). A well-known example of predicative scenarios is the projection of global tourism till 2030 that the World Tourism Organization has used since 2010 (UNWTO, 2011).

Such scenarios can be plotted on a graph, often with a high, average and low forecast. These scenarios refer to a future that is singular, to *what will happen* and usually anticipate a period of up to five years.

### *Explorative scenarios*

A third type of scenario is explorative scenarios. These are based on key uncertainties in the long term and explore *what could happen* on a time horizon of at least five years if the key uncertainties develop in specific directions. Here the future is considered to be plural (Van Rijn and Van der Burgt, 2012). The key uncertainties could refer to the macro, meso and/or micro environment of a business, organisation or destination (Postma and Papp, 2020). Contrary to the aspirational and predictive scenarios that have mostly been presented and discussed in relation to the COVID-19 pandemic in the public domain, in March 2020 ETFI planned to develop explorative scenarios in its drive to develop a futures’ perspective for the global visitor economy.

Explorative scenarios are rooted in the idea that global society in general, and the visitor economy, is a so-called complex adaptive system (Milestad et al., 2014). A complex adaptive system comprises numerous elements such as individual businesses, destinations, consumers, national states and a high level of interconnectedness. The complex network of relations, the interdependencies between its components and its open nature (being exposed to forces driving change from the outside-in) makes the system vulnerable to the impact of forces from the outside or from within. Feedback (learning and adapting) and feed-forward loops (predicting,

planning) can have a positive effect by amplifying or reinforcing actions and negative effects by dampening or suppressing actions (Gershenson *et al.*, 2021; Hartman, 2021). This not only allows systems to adapt but also enables systems to develop in an unpredictable way and it may cause the system to grow, to collapse and reorient or to transform over a short or long period of time and to arrive at a different equilibrium with new actors, innovations, business types, concepts.

The COVID-19 pandemic is an example of a shock with disruptive implications for the global visitor economy. The complexity of the system implies that it is impossible to predict its (single) future. The best way to know the future is to explore multiple plausible scenarios. These scenarios can then be used to arrive at strategies and measures to prepare for what may come and so to become more resilient (Postma and Yeoman, 2021).

## Scenario development process

### *Horizon scanning*

The first step in the scenario development process was to identify the forces at work associated with the pandemic and the uncertain impacts on the visitor economy. This started with horizon scanning. Horizon scanning, also referred to as environmental scanning, dates back to the works by Aguilar (1967) and Ansoff (1975) on identifying weak signals as early indications of change. It implies a search process at the margins of the known environment and, if possible, just beyond (Slaughter, 2002). Horizon scanning is a systematic search for weak signals as early indications of emerging issues or change, trends or other developments, wild cards, persistent problems, opportunities, risks and threats. The outlook includes matters at the margins of current thinking that challenge past assumptions concerning the subject of investigation (Booth *et al.*, 2009; European, Directorate-General for and Innovation, 2016; Saritas and Smith, 2011; van Rij, 2010a, b).

CELTH used an issue-centred approach. Contrary to the exploratory approach, this approach focuses on identifying core documents that describe substantial parts of potential issues related to, in this case, the possible consequences of COVID-19. The focus has been on the discourse of academics and other experts in background articles in the media from 26 March to 21 April 2020, both nationally and internationally (Amanatidou *et al.*, 2012). The CELTH researchers have approached horizon scanning as “a creative process of collective sense-making by way of collecting and synthesising observations that hold potential for the formulation of pertinent future developments” (Könnölä *et al.*, 2012). The time horizon was set at the period till 2025. The varied fields of expertise of the researchers allowed for a diversity of observations. However, no measures were taken to prevent researchers’ bias. The researchers’ observations were collected and consolidated into a list of about 35 relevant forces associated with the visitor economy and tourism post-COVID-19, along with thoughts about the dimensions of each force.

### *Environmental analysis and driving forces of changes*

In the next phase, environmental analysis, the aim was to identify clusters of cause and affect relations and similar connotations in order to get a better understanding of the forces that would drive the change of the visitor economy during the period until 2025. This resulted in six clusters, each representing a force that could drive the future of the visitor economy post-COVID-19: the attitude of countries/national governments, the attitude of the (semi)public sector, the attitude of large (multinational) businesses, the attitude of the citizen (in its role as consumer) and the length and depth of the crisis.

### *Impact and uncertainty and key uncertainties*

The researchers ranked the driving forces according to its perceived level of impact and the perceived level of unpredictability and importance by uncertainty matrix. The attitude of the citizen

(in its role as consumer) and the length and depth of the crisis were regarded the most impactful and unpredictable, and so these were chosen as key uncertainties that would frame the four explorative scenarios ((Postma *et al.*, 2020; Postma and Yeoman, 2021). The unpredictability of both forces was framed by formulating two plausible extremes. These extreme yet plausible outcomes of both driving forces complete the scenario framework (Table 1).

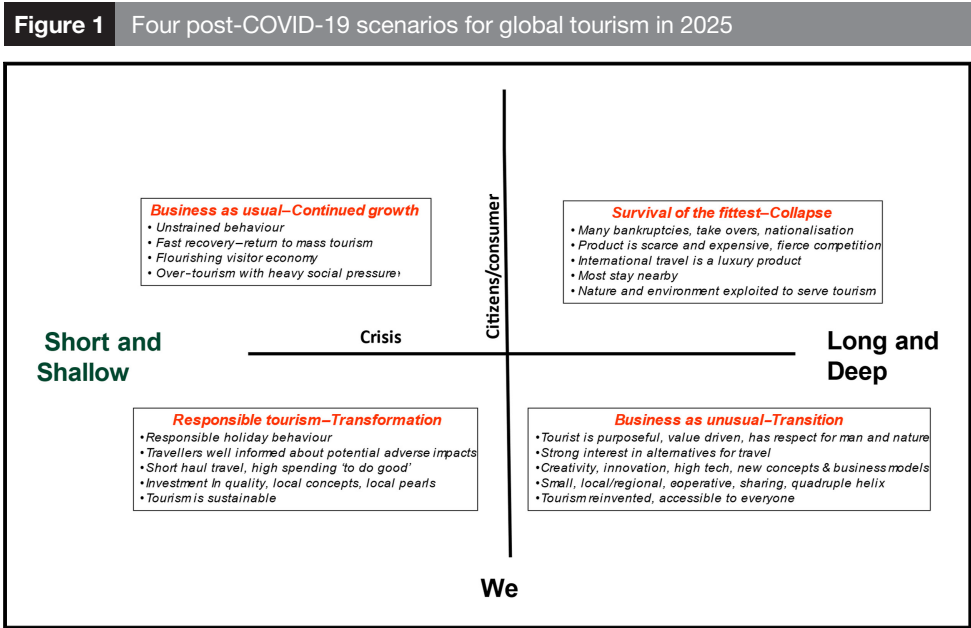
**Table 1** The critical uncertainties and their extreme yet plausible outcomes in 2025

| <i>Driving force/critical uncertainty 1: length and depth of the crisis</i>   |   |
|---|---|
| <i>Short and shallow recession</i>  | <i>Long and deep recession</i>  |
| <p>Vaccine widely available in 2020; lockdowns and social distancing comes to an end; the economy will recover in 2021</p> <ul style="list-style-type: none"> <li>- Consumer confidence restored, high level of welfare, but low level of well-being</li> <li>- Elections/political shift: Economy superior to man, culture and nature; neo-liberalism and populism have increased further</li> <li>- Small role of governments (deregulation, market thinking, privatization and therefore small/marginal public sector), care for citizens is limited</li> <li>- No or limited cooperation between central governments, provinces, municipalities, employer associations, trades unions, trade organisations and entrepreneurs</li> <li>- Governments and individuals create financial buffers to avoid future crises</li> <li>- Public debt has increased, but political measures to weaken the debt put pressure on citizens; profits of large companies flow to shareholders</li> <li>- 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</li> <li>- 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</li> <li>- Trade and transport are flourishing; oil prices are high</li> </ul> | <p>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</p> <ul style="list-style-type: none"> <li>- Consumer confidence low, low level of welfare, but high level of well-being</li> <li>- Elections/political shift: People, culture and nature superior to economy; socialist ideas are leading</li> <li>- Strong role of governments; strong public sector, financed with tax money; new type of welfare state for the protection of citizens</li> <li>- 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)</li> <li>- The parties involved share the financial resources</li> <li>- 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</li> <li>- The financial legacy of the crisis is passed on to the citizens, proportionate to their financial means</li> <li>- 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</li> <li>- Trade and transport in a deep trough, which results in low oil prices</li> </ul> |
| <i>Driving force/critical uncertainty 2: moral dilemma of the citizen in its role as consumer</i>   |   |
| <i>I – orientation (orientation on the self)</i>  | <i>We – orientation (orientation on the collective)</i>   |
| <ul style="list-style-type: none"> <li>- Man has not learned from the crisis and has fallen into old patterns</li> <li>- Values underlying views on nature and the environment remain the same; nature is makeable, humans are the dominant species</li> <li>- The aim is individual prosperity</li> <li>- Focus on material needs. Unlimited drive to consume</li> <li>- People want to stay in control themselves for reasons of privacy</li> <li>- Self-interest is paramount. Rebelling against the other and polarization (race, ethnicity, gender, social class, generations Generation Z vs Generation Z or youth vs elderly</li> <li>- Social media as outlet for discontent about the other. Public sector and authorities have no respect (government, science, police, teachers, etc.)</li> </ul>  | <ul style="list-style-type: none"> <li>- The crisis has brought people to repentance</li> <li>- 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 and traditional media</li> <li>- The aim is collective well-being</li> <li>- Focus on quality of life; consumption is attuned to this</li> <li>- Man is willing to hand over part of control to governments, despite the use of technological tools (drones, facial recognition, apps)</li> <li>- 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, neighbourhood, district, city and region</li> <li>- Social media are social again, facilitating connections genuine between people; public sector and authorities enjoy full respect (government, science, police, teachers, etc.)</li> </ul>  |

#### Four scenarios for global tourism post Covid-19

The two key uncertainties and their respective extreme outcomes frame four future scenarios for 2025: business as usual, with a continued growth of the visitor economy; survival of the fittest, in which the visitor economy has collapsed; business as unusual, characterised by a visitor economy

in transition and responsible tourism, with a visitor economy that has transformed. The scenarios and their key features are presented in [Figure 1](#) ([Postma et al., 2020](#)).



### Scenarios for New Zealand

The next stage involved building a scenario set for New Zealand as scenarios are seen as living documents and adaptive systems ([Davoudi and Porter, 2012](#)), in which they change because of different circumstances and become enriched ([Checkland, 1981](#)). The starting point was the global scenarios of [Postma et al. \(2020\)](#) as previously discussed.

### Finding a response

Scenario planning is often part of a *de facto* political process that requires the participation of key stakeholders ([Yeoman and McMahon-Beattie, 2014](#)). This stage involved the establishment of an advisory panel of key stakeholders and experts from New Zealand tourism, academia and futures-based organisations, four people in total ([Table 2](#)). The purpose of the panel was to test the New Zealand scenarios for legitimacy, provide input for content and to debate the content of the scenarios. The panel was selected by the authors based upon a combination of availability, willingness to help and an understanding of the New Zealand tourism system and bigger picture. The scenario construction process followed a “back of house” or “kitchen table” approach as advocated by Pierre Wack for speed and accuracy which is important when scenarios are constructed in times of crisis ([Chermack and Coons,](#)

| Table 2 Expert panel |                                      |       |
|----------------------|--------------------------------------|-------|
|                      | Role                                 | Age   |
| 1                    | Regional tourism organisation leader | 40–50 |
| 2                    | Regional tourism organisation leader | 50–60 |
| 3                    | Tourism academic                     | 30–40 |
| 4                    | Government policy advisor            | 40–50 |



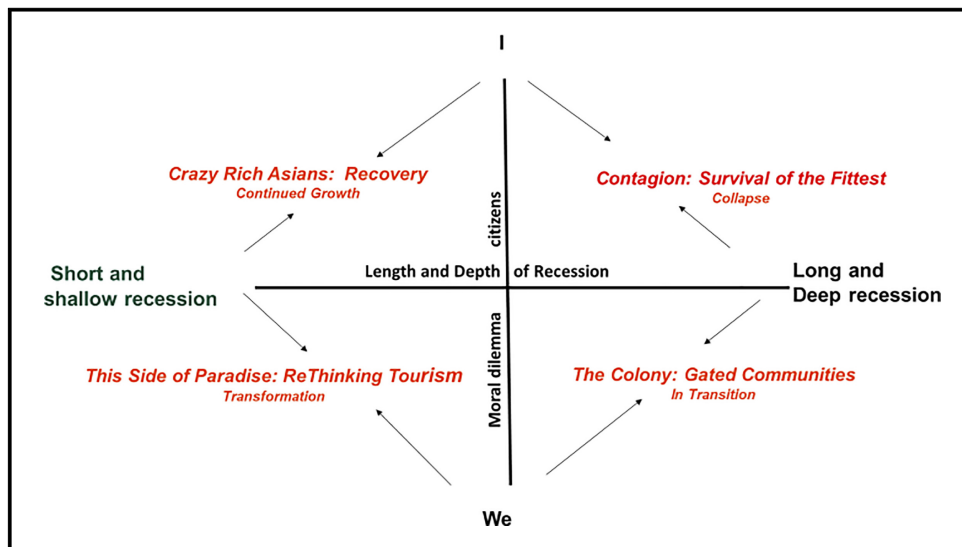
2015). The purpose of the scenarios was never to provide a deep analytical picture of New Zealand tourism and COVID-19, but provide a top-level or big picture situational analysis (Yeoman *et al.*, 2005).

### Scenarios as film titles

To communicate the ideas of the scenarios more effectively, Postma's scenarios were adapted from a visual perspective for a more dramatic effect (Arnheim, 1970; Kurvits *et al.*, 2019). One such method is to use well-known film titles which act as metaphors for the scenarios and create a perception and internal visualisation for participants of what scenario may look like (Aikio *et al.*, 2005). Using film titles brings association, realism and connection between the film, scenarios and real world, thus bringing the scenarios to life (Yeoman *et al.*, 2021).

*Business as Usual* became *Crazy Rich Asians: Recovery* (Chu, 2018) which is a film that follows a Chinese-American professor who travels to meet her boyfriend's family and is surprised to discover they are among the richest in Singapore. The film represented many of the attributes of tourism in New Zealand prior to COVID-19 i.e. a focus on high value tourists from Asia. *Survival of the Fittest* was changed to *Contagion: Survival of the Fittest* (Soderbergh, 2011). This film plot concerns the spread of a virus transmitted by respiratory droplets and fomites, attempts by medical researchers and public health officials to identify and contain the disease, and the loss of social order in a pandemic. This film title was selected because of the reality of the COVID-19 pandemic and represented a worst-case scenario for New Zealand tourism. Responsible tourism was changed to *This Side of Paradise: ReThinking Tourism* (Senensky and Roddenberry, 1967) which is a Star Trek episode in which the USS Enterprise visits an utopian colony but it is not all what it seems, as utopia to one person is a dystopia to another. This TV episode was selected because of the focus on utopian paradises and previous work of the authors (Yeoman *et al.*, 2015). The final scenario, *Business as unusual*, was changed to *The Colony: Gated Communities* (Hedden, 1995) as this film follows a carjacking, a man and his family move into an Orwellian-like gated community where the billionaire owner controls the residents' lives. There are draconian rules, armed guards all over and cameras in all the rooms. Then sinister things begin to happen. The title was selected because it represented New Zealand as a fortress destination trying to keep the virus at bay (see Figure 2).

**Figure 2** Scenarios for New Zealand tourism



## Crazy Rich Asians: Recovery – continued growth

### *Narrative*

We imagine a future where we just want to get back to normal. Tourism New Zealand's marketing campaign says, "Live More, Fear Less". This scenario presumes COVID-19 has been eliminated and contained across the world. "It just sort of went away" as US President Donald Trump tweeted. Global tourism has rebounded quickly, evident by wealthy tourists – many from buoyant Asian markets – returning to New Zealand in hordes to spend, spend, spend. We see unrestrained behaviour in Queenstown as the party central. Over-tourism has re-emerged in hotspots such as the Church of the Good Shepherd and mass tourism seems to be the new norm. In the drive for recovery, sustainable tourism guidelines were suspended. This meant imported moose from Canada are again roaming in Southland. Big game shooting is a high-yield tourism activity.

### *Signals*

1. Domestic travel in China is already beginning to recover ([Zhang et al., 2021](#)).
2. Air travel recovered within six months of the SARS outbreak. While analysts predict it will take longer post-COVID-19, it is clear demand will remain even after a big crisis ([Hung et al., 2018](#)).
3. At the time of writing this paper, there were 90 vaccines in clinical trials across the globe ([Mahase, 2020](#)).

### *Tourism perspective*

1. Fast recovery of global tourism and the return to mass tourism;
2. Strong economic growth, flourishing visitor economy;
3. New niche products and the experience economy;
4. Social and ecological pressure;
5. Hedonism and egoism.

### *The tourist*

As the world took dramatic action to contain COVID-19 and we saw the elimination of the virus, consumers quickly returned to destinations and pent-up demand rose dramatically.

### *The risk*

The rush to reopen.

### *Vision*

Live more, fear less.

### *Strategy*

This is what industry wants based upon the principles of Keynesian economic growth ([Rand, 1967](#)).

### *Contagion: Survival of the Fittest – collapse*

*Narrative.* COVID-19 has spread throughout the world, no one has escaped. Like the common cold, there is no vaccine. Globally, social disorder prevails. We now live in a world where tourism as



we know it has disappeared, although a few of the super-rich have descended on Stewart Island – now a gated community of the privileged class. Across the world, protectionism prevails, and New Zealand is a third world country according to OECD indicators. Social deprivation is everywhere. Tourism is only for the elite in society and those tourists can be spotted in eco-resorts such as Eagles Nest and on Kiwi safaris. It resembles apartheid in South Africa, the economic and class divide has never been so great.

#### *Signals.*

1. Dramatic fall of international arrivals globally, no country or company has escaped ([UNWTO, 2021](#)).
2. Make American Great (again) ([Kinney, 2018](#); [Le, 2017](#)).
3. Rise of protectionism, “me first” and fight for health supplies ([Noland, 2020](#); [Rukshad, 2020](#)).

#### *Tourism perspective.*

1. Disparity of success and failures;
2. Polarisation of society and the economics of apartheid;
3. Fierce competition on price;
4. “Me first”;
5. Protectionism, keep it out.

#### *The tourist.*

1. The risk;
2. The end of tourism as we known it except for the super-rich;
3. Polarised society;
4. The end of tourism.

#### *Vision. Survivor.*

*Strategy.* This is your exit strategy.

### ***This Side of Paradise: ReThinking Tourism – transformation***

*Narrative.* COVID-19 has changed the world and tourism has changed too. We are more altruistic and take a collective approach to collective well-being and towards others in society. It seems as if tourism has grown to be the solution for New Zealand’s problems. Tourism is right at the heart of our communities with the balance between residents, business and tourists just about right. We are the “EcoParadise” according to United Nations World Tourism Organization. As a consequence of the pandemic and the 100% Pure New Zealand Climate Change and Sustainable Tourism Act of 2021, the country enacted a whole series of changes within the industry beginning with a certified green hotel scheme in which every hotel in New Zealand is graded from a sustainability perspective. Stewart Island was the first community in the country to abandon the petrol combustion engine, with all transport being either hydrogen cells or electric. All of Air New Zealand’s domestic schedule is on course to be electric planes by 2030, thanks to an accelerated research, design and build programme with Airbus. Our conservation credentials are the best.

*Signals.*

1. Huge rise in #supportyourlocal initiatives for restaurants and hotels (Gössling *et al.*, 2020; Holly, 2020);
2. Restaurants donating unused food to food banks and employees who have been hard-hit by the lockdown (Tahira, 2020);
3. Drive to rethink tourism with a focus on communities and sustainable futures (Higgins-Desbiolles, 2021).

*Tourism perspective.*

1. A rethinking of tourism's relationship with the ecosystem;
2. A sustainable and balanced future;
3. Conscious, well-informed, responsible holiday behaviour;
4. Rethinking capitalism.

*The tourist.* Consumer behaviour, naturally more risk averse during the crisis will have changed habits for the longer term. An altruistic and collective approach to society. A focus on trust.

*The risk.* Utopias are never achieved as there is no desire to re-imagine.

Not taking the opportunity.

*Vision.* Eco paradise.

*Strategy.* This is what government, conservationist's and some of industry want.

Redesign.

***The Colony: Gated Communities – in transition***

*The narrative.* COVID-19 is a permanent feature but governments step in to manage it with regulation. Our borders closed, then open again as waves appear and disappear. We live in a world that is not back to normal, but we can operate in a relatively safe environment. Generally, we are more risk-averse. From a tourism perspective, the middle classes have been squeezed so tourism is less than what it was before. We do have Australian tourists who are in our bubble and international tourists who carry a WHO certificate as COVID-19 free. Track and trace is the norm as Google is now working with the government so they know where you are and what you are doing. Tourism New Zealand's marketing campaign "Cocoon in New Zealand" struck a chord. We are a safe place to holiday, relatively speaking.

*Signals.*

1. The plan for a "Trans-Tasman Bubble" to allow Australians and New Zealanders to flow between the countries (Edwards, 2020; Wilson, 2020).
2. Regular citizens are beginning to take action against tourists, who use precious resources and are potential carriers for the virus (Bennett, 2020).
3. Travel plans will be scrutinised through the lens of what is safe, rather than what used to be popular (image and status) (Sharfuddin, 2020; Yeoman, 2020).
4. The super-rich escaping to sustainable, escapist and untouched locations as isolation and purity become code for premium (Yeoman, 2020).

*Tourism perspective.*

1. Squeezed middle classes, not what it used to be;
2. Local rather than global, domestic and regional markets;
3. Gated and island communities;
4. It never goes away;
5. Smart destinations and a big brother society;
6. Self-sufficiency;
7. Focus on health and well-being;
8. Collectivism;
9. Re-emergence.

*The tourist.* A world where COVID-19 is a permanent feature but governments step in to manage it with regulation. The scenario would see borders close when infection emerges and would mean companies could operate in “a relatively stable and prosperous business environment” but be prepared for restrictions being put in place. Consumer behaviour, naturally more risk averse during the crisis, will have changed habits for the longer term. This means travel companies will need to earn trust again.

*The risk.* Leakage: It’s constant.

*Vision.* Your Cocoon.

*Strategy.* This is what you think it is going to be.

### Discussion points: scenario conflicts

Fans of post-apocalyptic literature will no doubt be aware of the novel *World War Z*, by [Brooks \(2006\)](#), which became a star-vehicle for Brad Pitt in 2013. In it, a pandemic transforms the sick into zombies, killing 85% of the Earth’s population. But some far-sighted countries managed to stem the tide and save their population, notably Israel, which decided to close its borders to protect its citizens from the mysterious virus which originated in China. It was Israel’s portrayal in the film which inspired this scenario. New Zealand was Israel. An isolated island which closed its borders to the rest world, thus the scenario *The Colony: Gated Communities* became the central scenario in the scenario set. A country trying to keep COVID-19 at bay as the rest of the world is overrun by the COVID-19 pandemic. New Zealand was a fortress or gated community cut off from the rest of the world. Life has been relatively normal through 2020–2021 as the country operated at level 1 ([Cumming, 2022](#); [Gordon and Baker, 2015](#); [RNZ, 2020](#)) within the countries pandemic planning system, meaning life was normal except for closed borders. This was a scenario about resilience, containment and safety. The scenario expected breaches in which COVID-19 would get into the community. This did happen with minor breaches through managed isolation quarantine facilities ([Cumming, 2021](#)). Without doubt, tourism in New Zealand has suffered as the country lost its largest export earner – international tourism. Regions and destinations within New Zealand with higher dependency on tourism, i.e. Northland, Queenstown Southland, etc. suffered more than others. The government strategy based upon *The Colony: Gated Communities* has been a successful one in the terms of COVID-19 deaths and cases compared to the rest of the world. However, all scenarios have pressures. Most notable has been the wariness of the New Zealand population, compliance with lockdowns, vaccination mandates and a top-down government approach to managing COVID-19 which resulted in the occupation of the Parliament grounds in Wellington in February 2022 ([Duliba et al., 2022](#); [Henrickson, 2020](#); [Szöllősi-Cira, 2022](#)).

Within New Zealand there was a drive to create a legacy – how does the tourism industry move to *This Side of Paradise: ReThinking Tourism* scenario? This would transform the industry based upon the principals of sustainability and regenerative tourism (Cave and Dredge, 2020). This was the task of the Tourism Futures Task Force (MBIE, 2021), to re-imagine New Zealand tourism for a better world. However, the motives were political and utopian in order to accelerate present government policies (MBIE, 2019) and other publications and policies on the horizon, i.e. *Not 100% – but four steps closer to sustainable tourism* from the Parliamentary Commissioner for the Environment (Upton, 2021). This scenario was driven by many advocates within government, academia and the third sector. This perspective reflected a reset for New Zealand tourism based upon the principles of socialism (which was the government party), de-growth and climate change. In particular, the Department of Conservation, which has a legislative responsibility (Conservation Act of 1987) managing the natural and historical heritage of New Zealand through National Parks and the Conservation Estate, was pushing this agenda. As a consequence, the *New Zealand–Aotearoa Government Tourism Strategy* (MBIE, 2019) was suspended in the meantime but not forgotten. The political role for the Tourism Futures Task Force was to reposition government policy (or represent) in this world of COVID-19. A task force approach was used given New Zealand's pluralistic and consensus approach to politics. The task force mandate was advisory and independent (Albrecht, 2017). Members were fundamentally technical experts and key stakeholders representing tourism organisations (MBIE, 2021). The weaknesses of the task force were the notable lack of academia representation whose opinion seemed to have been marginalised during COVID-19, the strong advocacy towards a preferred future rather than taking a multiple futures perspective and a focus of a high-level aspiration ideas rather than operational and practical decisions.

Other stakeholders did not agree with Tourism Futures Task Force remit, as it conflicts between re-imagination and regrowth as many businesses during lockdown where haemorrhaging money and losses. Here, there was a very strong to desire to move from *The Colony: Gated Communities* to *Crazy Rich Asians – Recovery* as industry did not want to re-imagine given the success of the New Zealand tourism prior to COVID-19. One of the mechanisms to achieve this was a series of proposed travel bubbles initially with Australia and the Cook Islands. But these bubbles never came to fruition until mid-2021 because of the continuous breaches through MIQ facilitates and the re-emergence of COVID-19 through small community outbreaks – hence why *The Colony: Gated Communities* was the dominant scenario trying to prevent *Contagion: Survival of the Fittest*, which was the worst case scenario. In the end, the Tourism Futures Task Force activities closed early without the completion of the final report. This was because of a change in Tourism Minister from Kelvin Davis to Stuart Nash who placed stronger emphasis on recovery and a *Crazy Rich Asians* type scenario.

At the beginning of the pandemic, Tourism New Zealand (2020) was forecasting in May 2020 that COVID-19 would be over in six months. It quickly emerged, that this linear and simple perspective was not true given the fluidity of events. Complexity and uncertainty became the central features of COVID-19 as New Zealand needed to adopt an approach of resilience and multiplicity for policy and strategic decisions as the situation changed and evolved (Altig et al., 2020; Baker et al., 2020; Mazey and Richardson, 2020). Thus, the scenarios became useful framework as a “back of house” framework for policy makers and stakeholders. As Davoudi and Porter (2012) stated, the value of scenarios is “to change, adapt, and, crucially, transform in response to stresses and strains”. New Zealand went through all four scenarios and these scenarios captured the complexity, relationships and movements of tourism in a COVID-19 world.

## Concluding thoughts

The scenarios are a representation of how New Zealand tourism adapted the global visitor economy scenarios of Postma et al. (2020). The scenarios played a useful role in framing the uncertainties and fluidity of COVID-19 in order that stakeholders and actors could make sense of COVID-19 to find a way forward for New Zealand tourism. The scenarios were framing devices

rather than a detailed response to COVID-19; but the one advantage they had over economic forecasts and single future strategy documents is that they offered flexibility, especially as New Zealand moved between different COVID-19 tiers (Cumming, 2021) and they were simple enough for most people to grasp. As such, the scenarios help to assist the various stakeholders of tourism and destination development to understand how the outside-in impact of COVID-19 can play out in different ways for the tourism system(s) as well as inform feedback loops (learning and evaluating what is actually happening) and forward loops (understanding future situations to achieve and those to avoid). Doing so helps us to understand how stakeholders have been adapting, are adapting or how they could adapt to changed circumstances in the recent past, and how they can adapt to possible and plausible changing circumstances in the (near) future. Scenarios then become a tool for tourism's stakeholders to build the adaptive capacity of the overall tourism system that allows it to cope with, adapt and transform to forces driving change that stem from outside of the systems.

Looking forward, the arrival of COVID-19 has changed New Zealand government and stakeholders' perspectives of policy and strategy making (Eden and Ackerman, 1998). To many, New Zealand was perceived to be gold standard in standing out and avoiding the worst of COVID-19 compared to the rest of the world (Mazey and Richardson, 2020). The sacrifice of an industry, notably international tourism, has brought a realisation that New Zealand's approach to destination planning has to move from one based on certainty, i.e. evidence based, and short termism to anticipatory (Boston, 2017; Yeoman and McMahon-Beattie, 2016). Here, resources need to be focused on a system's thinking, futures and a scenario-planning perspective in which the future is futures rather a singular view of what the future could be. Even with the Omicron variant of COVID-19 taking hold in New Zealand (at the time of writing of this paper) the focus is on the *This Side of Paradise: ReThinking Tourism* scenario as the preferred future, but what if COVID-19 was to linger on, on and on or another major disruptor event occurred. Resilience, adaptability and anticipation are elements we are advocating as a way forward for New Zealand tourism and other destinations too. Thus, this paper becomes an exemplar of how tourism policy makers and strategists could frame the future in times of uncertainty and complexity.

## Notes

1. <https://covid19.govt.nz/>
2. <https://coronavirus.jhu.edu/map.html> as 5 May 2020.
3. <https://www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-recovery/tourism-futures-taskforce/>
4. Postma scenarios used the words "visitor economy", whereas this has been changed to tourism for the New Zealand scenarios. The meaning is the same.

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