

FUTURE-PROOFNESS IN THE POST-COVID TOURISM SECTOR

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ABSTRACT

It is increasingly justified by conscious thinking about the future why it is a good agreement to use the character of a competitive athlete in tourism branding as well as in tourism-related branding. Prospective researchers bluntly say that future-proof businesses should be designed like sports organizations. The analogy is good because a successful athlete's character is built on three defining pillars: speed, awareness and action. This trio of values will be useful for those who work in the areas of tourism services, tourism management or tourism development. The present study, referring to the results of recent global studies as well as Hungarian researches at a number of points, provides marketing and management responses for each of the challenges described in the sub-paragraphs.

Keywords: *Future-proofness, Tourism, Sustainable Success, Preferable Future, The 5-O Model*

1. INTRODUCTION

Still very much experiencing the vibrations of the coronavirus crisis, we can conclude that not only tourism businesses and attractions, accommodation and catering establishments, but also tourism sites and destinations need to operate in an environment that changes frequently and intensely. However, this conclusion is not the end of the COVID lesson, because as Tom Cheesewright (Cheesewright, 2020) suggests, we must also adapt our activities. The starting point for this change is that the optimised operation of destinations – which has been our goal in the past – must be reoriented towards adaptive operation. Presence and campaigns in the sending markets, as well as unrestricted access for all to airline travel, have provided our guests with comfortable travel, also resulting in ever increasing numbers in diagrams representing the number of visitors and guest nights (UNWTO, 2015). We have learned the strategy and tactics needed to achieve them, and the branding principles we need to follow. The study highlights the concept of sustainable success and the need for creative thinking (WEF, 2020), and its main objective is to define what we should talk about as 'new' in the tourism sector following the COVID pandemic. Using a portfolio analysis of tourism in Hungary as a research method, the authors formulate five new pillars for future-proof tourism. The research focuses on the field of cultural tourism, as heritage tourism management has the potential to create interactions between the destination's stake-holders with the highest value, the most content and meaning (Bassa & Bódis, 2020). The current study aims to compare the 5-O model (as a model of future-proofness in tourism) with the analysis of cities with cultural tourism potential in Hungary and to conclude whether the strategies and services of the selected destinations are well-founded for the post-COVID-19 re-launch in the light of changing consumer patterns.

1.1. Immediate success vs. sustainable success

“2020 has been a year for transformation, from offline to online. But one thing hasn't changed, humans need to feel connected and still desire to network. So, if that means for the time being we need to do it virtually, fine.

But the minute we can meet in person again, you'll see how keen everyone is to get back to work again," says Olivier Ponti (Ponti, 2020), Vice President of Insights. The data shows that the rebuilding of the tourism sector and the leisure segment as a whole is imminent, and even flares up from time to time, but for the time being there is no permanent change. This phenomenon was noticeable during the summer of 2020 on Lake Balaton in Hungary (NTAK, 2020) and in southern European holiday destinations in Portugal, Spain and Greece, as well as in the USA, where sales of airline tickets to Mexico showed double-digit growth (Tomaselli, 2020). The time for harmonisation and rebalancing is still to come. Making our services viable, on the other hand, is an opportunity we can take advantage of. The solution does not require huge financial resources and investment, nor is the time investment too great. Consistency and success in branding can be guaranteed through a unified, constant and coordinated presence, speed, awareness and the ability to act. It does not happen immediately, of course, and it is better to forget the practice of 'immediate success' and introduce the phrase 'sustainable success' instead. There is one more thing that tourism and marketing professionals working in their offices need to realise. Whereas the ideal, comfortable, well-oiled, pre-Covid era was best characterised by working on tourism, it is now necessary to do the same in tourism. The idea is also expressed at master plan level in the Austrian tourism development concept, which states that "The goal is a sustainable tourism involving all enterprises, employees, the local people and guests" (Plan T, 2019).

2. BACKGROUND

Looking at the product palette of tourism, there will certainly be areas that will change a lot. The area with the most dramatic prospect is perhaps business tourism, which was booming before the pandemic. Thanks to technology and innovation, conferences took the form of virtual events and webinars in 2020, using platforms such as Hoppin, Zoom or even GoToWebinar, with a sharp decline in demand for traditional face-to-face meetings and MICE events (ETTravelWorld, 2020). So, is everything going to be very different now? – you might ask.

2.1. What if?

Viability or future-proofness is a short way of saying that we are ready. Ready for action, which in many cases involves organisational and structural changes. Take the well-known example of LEGO (Grienitz, 2013). Buying your child a model car means that the child gets the most optimal toy, the one that is most similar to the original. When, after three days, the child is no longer so bound by the gift, we know immediately that the one thing that is missing is the possibility of the "What if?" question and situation (Figure 1). By not providing a perfectly faithful or congruent copy, i.e. an optimised solution, but one that can be dismantled at any time after the first assembly and redesigned and rebuilt at will, the Scandinavian toy manufacturer is also creating something new: the possibility of learning, understanding, development and, not least, the possibility of adapting and working out new models.

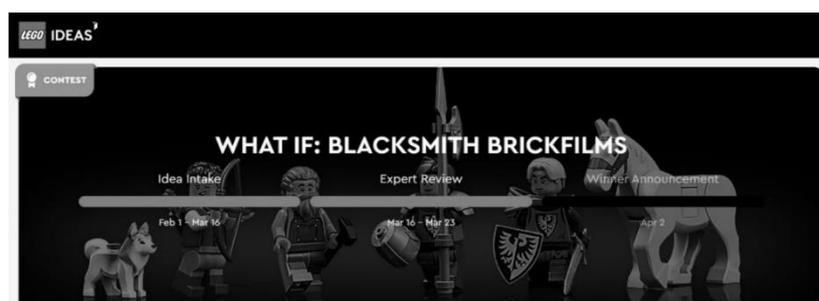


Figure 1: What if Contest
(Source: LEGO, 2021)

According to the analyst team of ForwardKeys, the waves of COVID-19 will continue, and may even intensify, as the world continues to open and close country borders again. "These are volatile times and, as such, businesses and travel operators will need to keep adapting to new models which allow them the agility to seize new opportunities," says Olivier Jager, CEO (Jager, 2020). As early as autumn 2020, European professionals were also gearing up: 140 tourism information centre professionals representing 42 leading European cities joined the Digital ECM TIC experts' conference to share best knowledge and best practices on adaptation and innovation. The event focused on the key theme "adaptation and innovation in times of crisis", with inspiring speakers Patrick Chen from Shanghai and Jordi López from Sant Carles de la Ràpita presenting best practices from the member cities of the marketing association (ETTravelWorld, 2020). The decision is in our hands from 2021. Either we want to secure ourselves in the most optimal situation, or we adapt, empowering our services and destinations to be viable and future-proof.

2.2. The 5-O Model

Almost all of the goals in the UN (UN, 2015) SDG (Sustainable Development Goals) framework can be linked to tourism, simply because the tourism sector interacts intensively with all aspects of life (T4SDG, 2016). Based on the Futures Consciousness Model (Ahvenharju, Minkinen & Lalot, 2018), we can distinguish 5 dimensions: Time perspective, Agency beliefs, Openness to alternatives, Systems perception, Concern for others. These five pillars have been translated by the Hungarian next-generation tourism development community Hungary NEXT (Hungary NEXT, 2021) into words that gain relevance in tourism (Table 1).

FUTURES CONSCIUOSNESS models	
Five Dimensions of the Futures Consciousness Model	5-O Model of Future-Proofness
Time perspective	Ongoing
Agency beliefs	Offstage
Openness to alternatives	Openness
Systems perception	Order
Concern for others	Others

*Table 1: An explanation of the 5-O Model
(Source: Hungary NEXT, 2020)*

So here are five points to highlight that will provide a basis for immediate actionable responses for any tourism business or destination preparing for a future-proof position. Firstly, the guarantee of success and growth (SDG 8: Decent work and economic growth) is to work continuously ahead (ongoing), not to dismiss employees and then rehire them, or perhaps hire some less experienced and less skilled workforce. The definition of a pathway also implies an order, innovation (SDG 9: Industry, innovation and infrastructure), in which we can find many good practices in Hungary. Diversity, excellence and the presentation of one's own values are, of course, the domain of marketing work, but a region, a destination or a catering unit with a strong network of partners is less vulnerable. The responsibility of tourism is now even more in the spotlight, because superficial messages and superficial results are not enough. By creating value communities, we can achieve responsible production and consumption (SDG 12: Responsible consumption and production) in our sector too, based on the concept of meaningful tourism, as formulated earlier, i.e. a deeper (offstage) presentation of people and cultures, which is an attractive offer even in quarantine mode. In the long term, the interests of the community (others) will be pursued rather than individual interests, and we will also move towards the preservation of the living environment (SDG 15: Life on land).

It is true that partnership is numbered 17 in the system (SDG 17: Partnerships for the goals), but openness is of primary importance.

3. MAIN FOCUS OF THE ARTICLE

The future could theoretically be of any shape (Figure 2). If we want to define the broadest future, it is none other than "possible future". If we were to work only within this broad spectrum, it would hardly be possible to shape, form or influence the future. "Plausible future" is a narrower range of interpretation, because there are signs, phenomena and trends that narrow down the set of theoretically possible events. 'Probable future' is perhaps the narrowest range, but even here we have little freedom. We need to pick favourable points from the possible future, supported by a range of obvious, available research and data, while also following trends and likely outcomes. In this way we can build up our own picture of a 'preferable future' (Hencey, 1978).

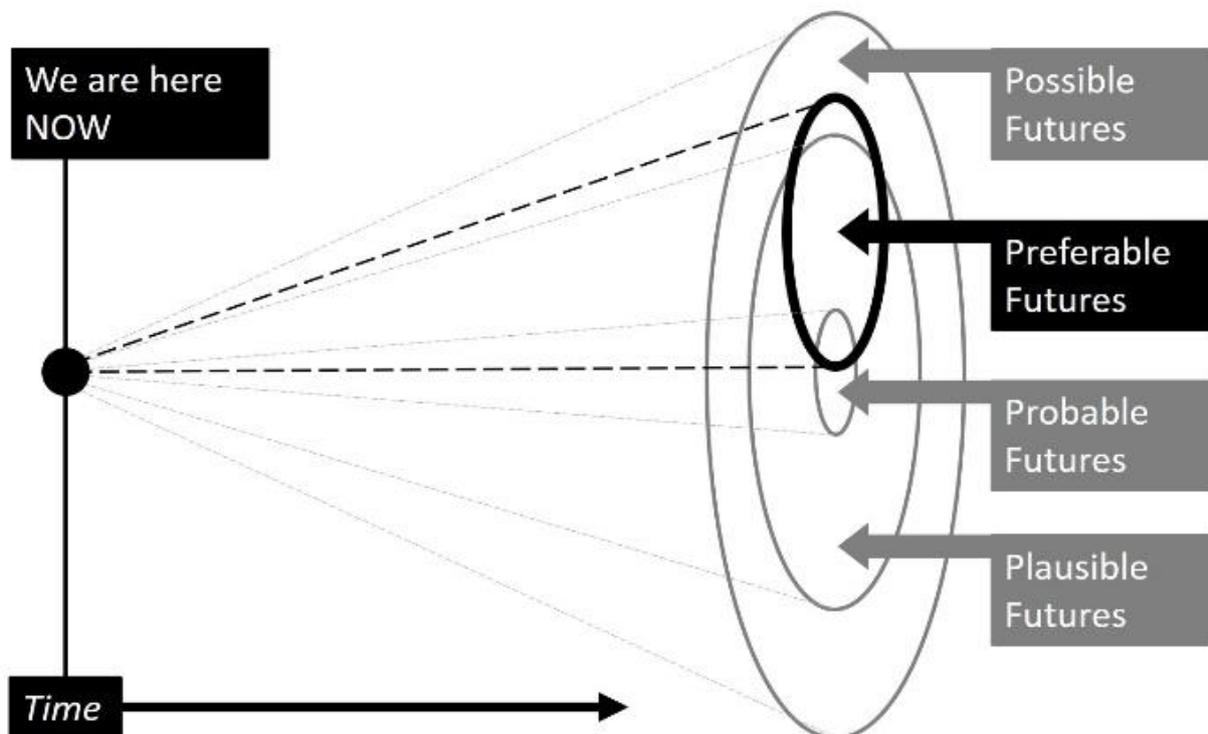
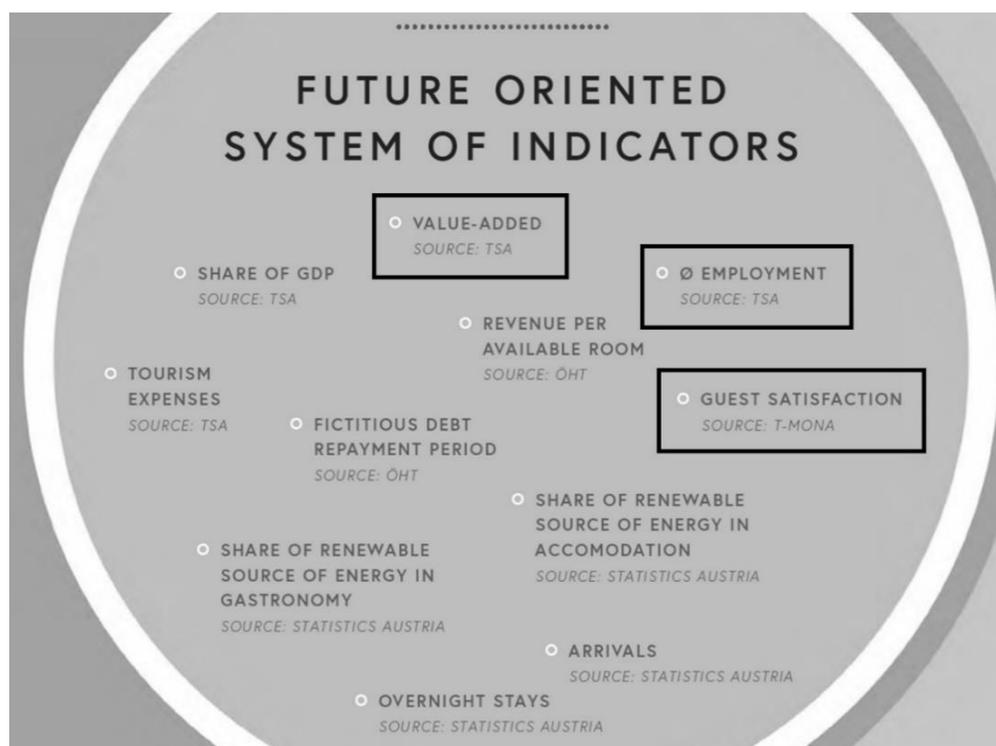


Figure 2: The Futures
(Source: Hancock & Bezold, 1994)

3.1. Is everything new now?

Almost. We have a new market situation, a new approach, new needs, we must refocus and, last but not least, we set up new goals. The new situation is that the competition is already on, not only to survive, but also to win starting positions when the markets open up partially or fully. According to the latest trend analyses, the days of planning a holiday a year in advance are gone. In China, people have become accustomed to pandemic conditions and tighter travel restrictions, to the point where they are comfortable booking 3-4 days before flying domestically. "And we don't see how this attitude will change even post-crisis," says Nan Dai (Dai, 2020), a Chinese tourism market expert. A recent report by Kalibri Labs confirmed that the last-minute booking trend is also true for hotel bookings in the United States: since the pandemic broke out, the time taken to pre-book has fallen from 2-3 weeks to just 5 days.



*Figure 3: Future oriented system of indicators
(Source: Plan T, 2019)*

Our approach is new, in that it has moved from a more self-centred, closed approach to destination (exploiting its own natural and human resources), to a more open approach (building on the competitive strength of relationships) (Pearce, 1995). Our focus is shifting from tourism 'measured' in economic and econometric data, investments and profits, to tourism 'understood' in the sense that people and their environment must determine our every move, considering a range of global earth-destroying phenomena (Figure 3). Demands, trends and patterns of consumer behaviour are also new: we have to want to change our ingrained, comfortable "it's been good, it will be good again" or "beat the horse that pulls" attitudes (Echo TV, 2018), and we have to change ourselves. The paradigm shift in tourism that has been implemented since 2016 and officially celebrated since then (MTÜ, 2016) cannot continue, it will not be enough, and much more is needed. To survive, we also need new goals: putting viability or future-proofness into practice. We shall now look at the above innovations based on the Hungary NEXT 5-O model (ongoing-openness-offstage-order-others).

4. PORTFOLIO RESEARCH

In 2020, researchers from Hungary NEXT and the Hungarian magazine Art is Business conducted a comprehensive case study analysis, mainly focusing on cultural tourism areas in Hungary, in order to get an idea of which destinations among the major cities are viable in terms of the developments and strategies that have been implemented in the last 5 years (Bódis, 2020). The approach of the research was based on the need to set up a system of comparison between destinations. The study looked at the supply and distribution of cultural services in the selected cities. The research is based on secondary data from various statistical databases and self-collected data. Significant and peripheral cities can be identified according to the specific groups of cities defined by the cluster analysis. In addition to these groups of cities, there are cities that exploit their cultural assets in different ways, with an emphasis on museums and festivals, and cities where creative communities and public cultural institutions play the most important cultural role.

The first step was to identify the range which classifies Hungarian cities by their size (Területi Statisztika, 2016).

CITY SIZES by population	
Type of city	Number of cities
City with over 100 thousand inhabitants	7
Medium-sized city with between 50 000 and 100 000 inhabitants	11
Medium-sized city with between 30 000 and 50 000 inhabitants	17
Medium-sized city with between 20 000 and 30 000 inhabitants	24
Small town with between 10 000 and 20 000 inhabitants	82
Total:	141

*Table 2: Primary categorisation of cities for portfolio analysis
(Source: Hungary NEXT, 2020)*

Towns/cities with a population of over 10 000 were therefore the priority for the researchers (Table 2). Smaller towns are not included in the sample because they usually have a single cultural institution with limited opening hours, one or two employees and (limited) multi-functionality. In these towns – with the exception of those on the shores of Lake Balaton – there are generally no cultural events that attract large audiences, and municipalities on the shores of Lake Balaton with fewer than 10,000 inhabitants tend to organise such events to increase their tourism appeal. The limited length of the research period and the ultimate aim of the research made it essential to further narrow down the number of towns. Thus, the second of the four city clusters in the aforementioned system was selected, which included 23 cities. Budapest, the capital city, was excluded from the analysis because it has a much larger cultural offer and a much larger volume of development (Table 3).

CITY CLUSTERS by function	
City cluster	Explanation
1. cluster	Cities of cultural centres and creative communities
2. cluster	Multifunctional cultural cities (23 cities, 16%)
3. cluster	Functionally deficient, culturally active cities
4. cluster	Culturally deprived cities

*Table 3: Further categorization of cities for portfolio analysis
(Source: Hungary NEXT, 2020)*

The cluster with the second smallest number of elements (23 cities), includes all but 3 county seats, 2 cities with county rights (Sopron and Dunaújváros) and Budaörs and Budakeszi, which are almost part of Budapest. In addition, there are a few towns with a smaller population that either have a unique cultural life due to their urban characteristics (Szentendre) or have a sub-central function between two major county seats (Békés, Szarvas, Celldömölk). Most of the towns in this cluster perform all the cultural functions, with the offer of theatre and cinema being the most prominent compared to the other clusters. Even if not all cities have a theatre building, they do have a theatre. In the only city that did not have a museum in the year under review, three museums have since opened their doors to the public. The 23 cities were further narrowed down by the research team, taking into account their geographical locations. As a result, five cities were identified and presented in the form of articles (one on each city), which is summarised in a table in this study (Figure 4, Table 4).



Figure 4: Presenting viable cities on the map of Hungary
(Source: Hungary NEXT, 2020)

PORTFOLIO OF MULTIFUNCTIONAL CULTURAL CITIES selected for the analysis					
Elements of the 5-O model	Győr North-Western Hungary	Miskolc North-Eastern Hungary	Szeged Southern Hungary	Szentendre Central Hungary	Szombathely Western Hungary
ONGOING	Synergic development of business and leisure tourism	Continuous development of the Lillafüred climatic health resort	Bird migration station, blooming of the Tisza: Nature-friendly developments	Constant renewal: organising the Éjjel-Nappal Nyitva (Open Day and Night) festival	Constant renewal: See, Hear, Touch, Feel campaign and events
OFFSTAGE	Development of the AUDI Hungária Visitor Centre	300-400 year old cellars and wineries, gastronomic tours	House of Mysteries: detective stories, discovery trails	Interactive development of the Open-Air Ethnographic Museum (Skanzen)	Historical insight: historic walking trail project and visitor centre
OPENNESS	'Gateway to the Western world' tourism positioning	Cooperation with the European Capital of Culture, Kosice	Regional Art Centre: thematising Art Nouveau	Serb, Dalmatian, Slovak, German and Greek nationalities: inclusion	Strong cross-border activity: host and organiser of several Interreg projects
ORDER	Consistent campaign strategy: 'one city, a thousand experiences'	Introduction of the Miskolc Pass city and regional tourist card	17 twin cities in strong partnership	New, insight-based segmentation tourism package offers	Involvement in the development and implementation of the main narrative of the Danube
OTHERS	Hometown of Spritzer (Fröccs), support from the Rotary Club	The University of Miskolc T-Model CSR Competence project	Interactive presentation of the inventor of vitamin C for children	A city of painters, a place for contemporary artists: incubation	Taking responsibility for dogs and dog owners: 'Doggy Good Day' programmes
References	(Art is Business, 2020)				

Table 4: Selection of cities according to the 5-O Model, with examples for each case
(Design: Hungary NEXT, 2020)

5. SOLUTIONS AND RECOMMENDATIONS

5.1. New situation: let us be known, let us be characteristic (ongoing)

In an increasingly fierce competition, the research of future offers us a time perspective. Time is even shorter in the new world. In marketing terms, this means that we need to present our services and places in a consistent way, so that we can build the brand image earlier and raise brand awareness. A good way to do this is to unify all our offline and online communication platforms, the so-called touchpoints, so that we can create a Service Interface, an imaginary plane, a homogeneous interface with all the touchpoints between the visitor and the service provider (Moritz, 2005). Another interpretation of time is that we must not only be present, but also be able to compare and be comparable. It should be more of a tool for overall management. European champion rower Péter Galambos, the face of the Hungary NEXT country brand community, is the best choice (Career Sport, 2021) precisely because his human and likeable character allows stories to be told and recalled much faster (speed was the first element of the initial value triad). This is due to the fact that the athlete is dynamic, representative, competitive, inspirational, motivates movement, can be followed, and serves as a role model (Figure 5). Moreover, as he is most often seen in Vác and on the Danube, he can be linked geographically to the Danube Bend, as was done by the experts in the case of Danube Bend tourism packages (VEKOP, 2020). These are the characteristics of a successful tourist destination – perhaps already.



Figure 5: Péter Galambos has got future-proof destination values
(Source: Hungary NEXT, 2020)

As a result of the quicker reactivation of the domestic travel market and inter-regional tourism, the latest data show that consumers want to travel despite travel restrictions and other existing barriers. Although long-haul travel is taking a back seat, domestic travel will be particularly popular in Russia, China and South Korea in 2021 (ETTravelWorld, 2020). **Let us promise them something familiar.**

5.2. New approach: utilize your relationships (openness)

The direction of tourism development must certainly change. The current, largely inward-looking tourism management organisations and attractions, which are constantly looking for new markets and manage their existing product range, are no longer sustainable due to the limits and constraints of intensive local growth, thus suffering the phenomenon of overtourism experienced in the past.

The so-called single-destination approach is being replaced by a more promising, adventurous, varied multi-destination approach, which is full of contrasts and surprises. It is a human trait that if something is on the other side of the river, you cross it, but if something is on the other side of the mountain, you go around it or climb it. This is not a new pattern of behaviour, but if we consciously (the second element of the initial value trinity) open up tourism destinations, in cooperation with the neighbourhood, be it a district, a regional competitor, a city or even a cross-border attraction, we have already picked up the thread of cross-border offers so popular in more developed countries (Tosun, Timothy, Parpairis & Macdonald, 2005). In parallel with local opportunities, the focus should now be on more ambitious, open and cooperative – but also sufficiently concrete – partnerships. The Danube, for example, is a natural link, first of all in the Budapest-Pozsony-Vienna relation (Kovács & Thurzó 2020). Cooperation between cities could lay the foundations for the cross-border development of the region. The infrastructure of this axis is virtually complete, and a complex offer of cycling, boating, cultural, wellness and business products could satisfy a wide range of needs. For such a package to be successful, it requires the support of the government, the acceptance of cooperation or even merging of actors, preparation for this and the promotion of new types of experience spaces. The marketing suggestion here is to develop and promote together, and the management response to this challenge is to engage colleagues, partners and suppliers to ensure that new products are created alongside our existing markets as a result of this outward turn. In the future, we will hear the word inclusive more often than exclusive. **Let us promise them trust.**

5.3. New demand: let us change and make a change (offstage)

Let us act as the last element of our sportsmen's value triad suggests. The unique, the authentic is already much more interesting than the mass, the mainstream. It would not be good in the future to promote and look for bucket lists (Perkins, 2020) or TOP-10 attractions: we want to introduce visitors to smaller and more local values that have not yet been discovered but can be linked. This thinking has already been implemented in some areas during the Covid pandemic, looking behind the scenes when the stage was closed. It is local values, identities and promises that really build the brand of a place. The role of marketing is to find the idea to make the invitation competitive and create the experience space, to which management can add reinforcement through design thinking. Often used call words such as "happiness", "joy" and "capital" of something have become empty and diluted just like the word "quality" (Bódis, 2020). **Let us promise them proximity.**

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New Tourism Regions in Hungary

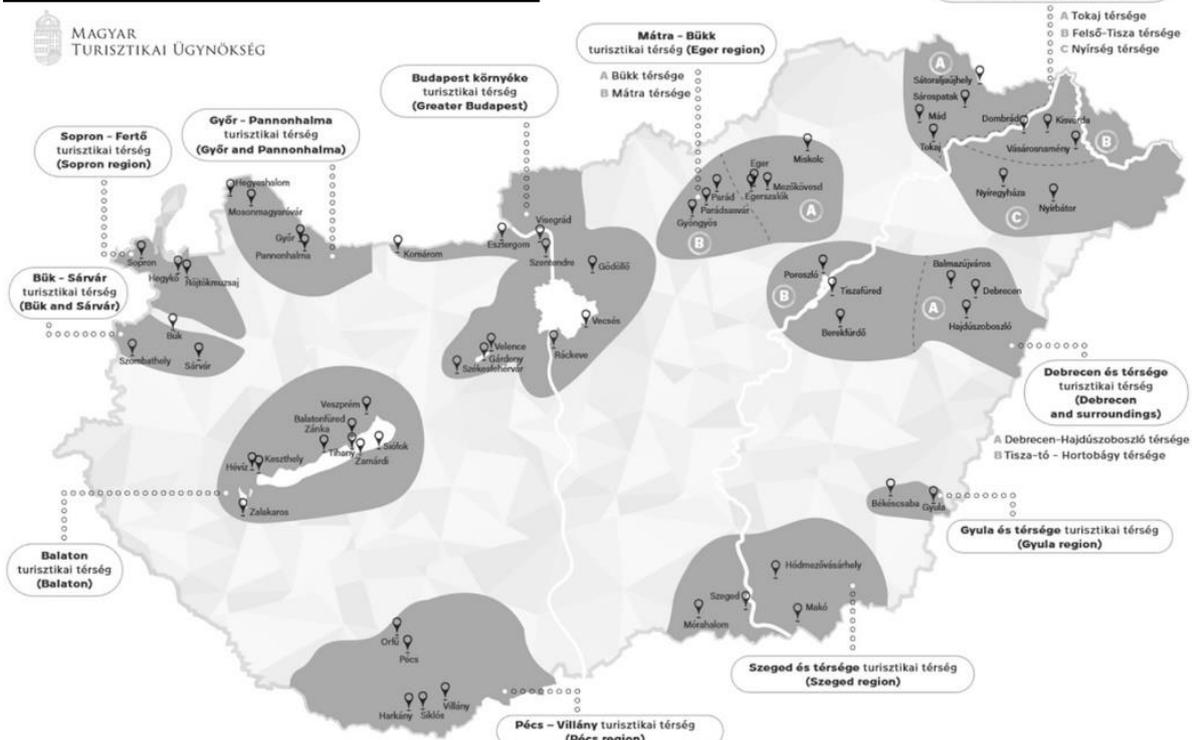


Figure 6: New Tourism Regions in Hungary
(Source: MTÜ, 2020)

5.4. New focus: humans in the system (order)

Let us start with the management suggestion now. The framework should be provided by the tourism organisation and content should be provided by the locals. The so-called bottom-up approach (Simpson & Siguaw, 2008) is very timely, as nowadays it is much more the national tourism marketing organisation that names, delimits and designates the regions to be developed. This has led to the questionable regionalisation of tourism, with almost half of Hungary not being considered for the future (Figure 6). But where are humans? Where does it leave people who do not work or run an enterprise in the tourism sector in a priority region, and where does it leave people who would like to visit the place? The marketing answer is that if we want to be successful in reaching the various segments, we need to get to know them, the players and the people – sensitively and in greater depth. New kinds of segmentation, such as the labels of big companies like Coca-Cola (classic/red—zero/black—life/green) or the adjustable driving styles of the new electric FIAT 500 (urban/average—fast racing/range—sherpa/conscious) (Stellantis, 2020) teach us that we can work with the classic—explorer—trendy behaviour-based visitor segments in tourism (Figure 7).

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*Figure 7: Driving styles of the new Fiat 500 La Prima
(Source: Fiat, 2021)*

A primary challenge is the use of information design, which is still underdeveloped in our country, and which goes far beyond the need to have a name plate with runic script for one's settlement (Király, 2011). The management of useful and up-to-date information by planning visitor routes also contributes to the desirable practice of capacity management, i.e. the spreading and balancing of visitors over time and space, so that they take home a truly clean, well-kept, orderly, organised view, content and an unforgettable experience of identification with the place, which we now call #newtourist. **Let us promise them safety.**

5.5. New goal: future-proofness or viability, responsible development (others)

The management question often arises as to what is more forward, the ego or the multitude, the individual or the community. If we are talking about environmental and social sustainability, it is obviously the latter. From a work organisation and job retention point of view, however, we can only rely in the long term on employees who can find their own personal development and growth in the company or organisation, who can make independent decisions and whose knowledge, skills and attitude promise tangible benefits for themselves and for the well-being of the community. In our marketing analyses, we come across the term 'selfness' with increasing frequency, which underlines the importance for everyone to feel a sense of responsibility towards themselves (Rocha, Seabra, Silva & Abrantes, 2016). Tourism can create a balance between these two through increasingly personalised offers, while the involvement of local communities and local producers can provide a number of marketing benefits. Reference point training is one such example, which could be a portfolio of own/local products linked to a city, such as "Krakowski Kredens" (Local Guide, 2018). Appreciated individuals are able to engage in community marketing work at their own level, and even in social responsibility programmes. A Japanese study (Maikoya, 2020) asked experienced travellers how they thought their travel behaviour would differ in the future. Around half of them said that if the pandemic ended, their attitude to travel would remain unchanged. Many travellers confirmed that they would be more attentive to hygiene and safety. Around a fifth of respondents mentioned the possibility of travelling less but for longer, and the support of local experience providers and local businesses. The fact that these responses were spontaneously formulated in this way reflects the continuing shift towards sustainability. **Let us promise the harmony of the individual and the community and its sustainability.**

6. CONCLUSION

In summary, we need to adapt in order to achieve sustainable success, which also depends on us – it is based on how ready we are now, how much we want to change and what future we would prefer. Re-interpreting the role of tourism destinations and businesses can provide us with one of the best positions near the starting line, if we truly embed the quick, conscious and proactive qualities of a characteristic sportsman in our thinking, strategy, relationships and organisational and communication systems.

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