
18 New markets and selling hope in a changed tourism world

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The objectives of this chapter are to:

- Identify the value of select trend analyses around times of crisis;
- Conduct a systematic review of DMO response in 25 major destinations;
- Review the immediate response by DMOs to the pause in 2020 tourism;
- Deduce and present incipient trends from the tenor of the promotional efforts.

Keywords: tourism paused, COVID-19 effects, DMO responses, trend analysis, sustainability theme, care for humanity

Introduction

The year 2020 will undoubtedly be remembered as a distinctive time that generated massive global disruption to tourism. The COVID-19 pandemic grounded airlines, froze nearly all domestic and international travel and left the great attractions of the global hauntingly beautiful in their bleak emptiness. Profitability plummeted across the sector; street vendors, sidewalk café owners, theme parks and powerful hotel owners were all affected. (Jamal and Budke, 2020). In the informal academic conversations, there were plenty of pundits promulgating their views that tourism would never be the same, that the time for reinventing the sector was at hand, and the pandemic was

the necessary cure for overtourism. A rush – possibly one might suggest a rash – of tourism special issues and dedicated volumes were advertised and the production of COVID-19 papers analysing the effects of the pandemic on tourism commenced.

In this chapter, two different themes germane to the present tourism dynamic are considered. First, select older treatises that addressed emergent markets in times of rapid change and evolution of the business world are reviewed. This work offers some insights as how to think about pressing concerns. Second, the contemporary attempts by destination marketing organisations (DMOs) across the world to retain their visibility in the minds of potential consumers are analysed. These varied online efforts to shore up public interest in future travel are interrogated by the researchers for the implicit themes about the needs of tourist markets in the coming years.

This chapter was developed with desk research to frame a book which was both planned before and then developed during this COVID-19 pandemic. The succinct timeline of disruptions in the literature review is used to identify the recurring value of paying attention to solid evidence at any one critical and crisis-filled point in time. The lessons learned offer some caveats and structure for thinking about new markets during dynamic times. The incipient signs of market shifts and novel trends in the DMO communications provide clues to new orientations and beginnings.

This chapter seeks to answer the following research questions:

- ◆ What are the key issues from a succinct timeline analysis of the prediction of post-event trends from previous crises?
- ◆ Did the markets change as a consequence or simply recover to follow the established formats of earlier times?
- ◆ Did the trends about the power of technology and the concerns about the environment appear as predicted?
- ◆ Is it likely that a brand new world of tourism will result from the present circumstances?
- ◆ What will the world sell now?

Trend studies and recurring value

In the last 25 years a number of well-publicised and far reaching changes have challenged the structure and nature of the tourism sector. They are broadly classified as disruptions, and include such macro-determinants of social and economic life as financial crises, demographic change, conflict, technology innovation and environmental imperatives (Gore, 2013; Yeoman and McMahon-Beattie, 2019). In this first section some key events are considered and leading publications about market trends that were written at

that time are reviewed. By investigating these responses and perspectives, and using some of the benefits of contemporary hindsight, it is possible to identify some recurring strengths in these market analyses that apply to the present circumstances.

In the 1990s, the world witnessed a strategic re-alignment of power and economic growth (Sheridan, 1999). The processes were labelled in various ways but included the Asian wave and the Asian renaissance (Godement, 1997). The countries involved and often referred to as the 'tiger economies' – notably Thailand, Malaysia, Singapore, Indonesia, Taiwan, South Korea, and the Philippines – plus the dominating presence of China, began to change global tourism (Davies and Gonzales, 2003). The rise of Asia as a tourism generating region and as destination accompanied such development (Ho, 2001; Leung, Leung, Bai, and Law, 2011). In mid-1997 and extending into 1998, the Asian financial crisis halted this growth and raised fears of a world-wide economic collapse. The multiple causes of this complex economic event included the inability of some countries to repay their loans with a consequential loss of investor confidence. Currencies were devalued, the construction of infrastructure halted and private debt rose. Asian outbound travel declined and the instability in the region due to the political and economic turmoil resulted in reduced international arrivals (Harris, 2000). The International Monetary Fund (IMF) initiated a US\$40 billion program to stabilize the currencies of South Korea, Thailand, and Indonesia – economies that were particularly hard hit by the crisis.

The event is salutary when considering the efforts of forecasters and pundits to describe the markets to the region and the changes in those markets. At that time, one widely read commentator on Asian trends, John Naisbitt (1997), constructed a list of trends shaping the future of Asia, many of which are relevant to tourism. He suggested that China and the ethnic Chinese, a part of the country's diaspora would emerge as a major network of influence in the coming years. Further, he stressed that the shift towards a consumer, rather than an export-led economy would be noticeable and that Asian values would be incorporated in the modernization and consumerism. He also foreshadowed the rise of super cities and suggested that massive urbanization would occur, women would be treated with more respect and gain power as decision makers, and computer-based technologies and communications would be prominent.

Over two decades later it is apparent that the Asian financial crisis was a roadblock to tourism development but the predictions at the time have unfolded in the key directions proposed (Tolkach, Chon, and Xiao, 2016). The implication from this first event is that some shocks to the tourism system can be tolerated, the consumer-led demand for the experiences