European Tourism Futures Institute

NHL STENDEN university of applied sciences

Dealing with uncertainty in a changing world

Dr. Albert Postma

Conference 'Tourism in Lapland in a Changing World '

Rovaniemi, 2 October 2026


Looking into
the future



Tourism trends

(meso trends)

Markets of Gen Y and Gen Z

Generation Y

Generation Z



@amorosarts

Professional Life-Liver

Professional World-Improver

Check trend report CBI

FIT TRAVELERS

(Fully Independent Travelers)

Free independent travelers



They avoid group tours and mass tourism.



FITs have above-average incomes.



FITs range from millennials to retirees.



FITs plan their own trips.

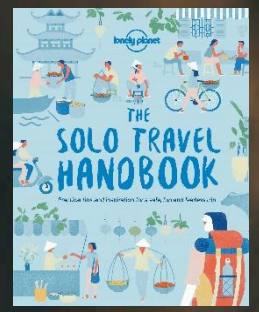


They sometimes use travel agents.

tripsavvy

FREE INDEPENDENT TRAVELER

Solo travel



Female travel



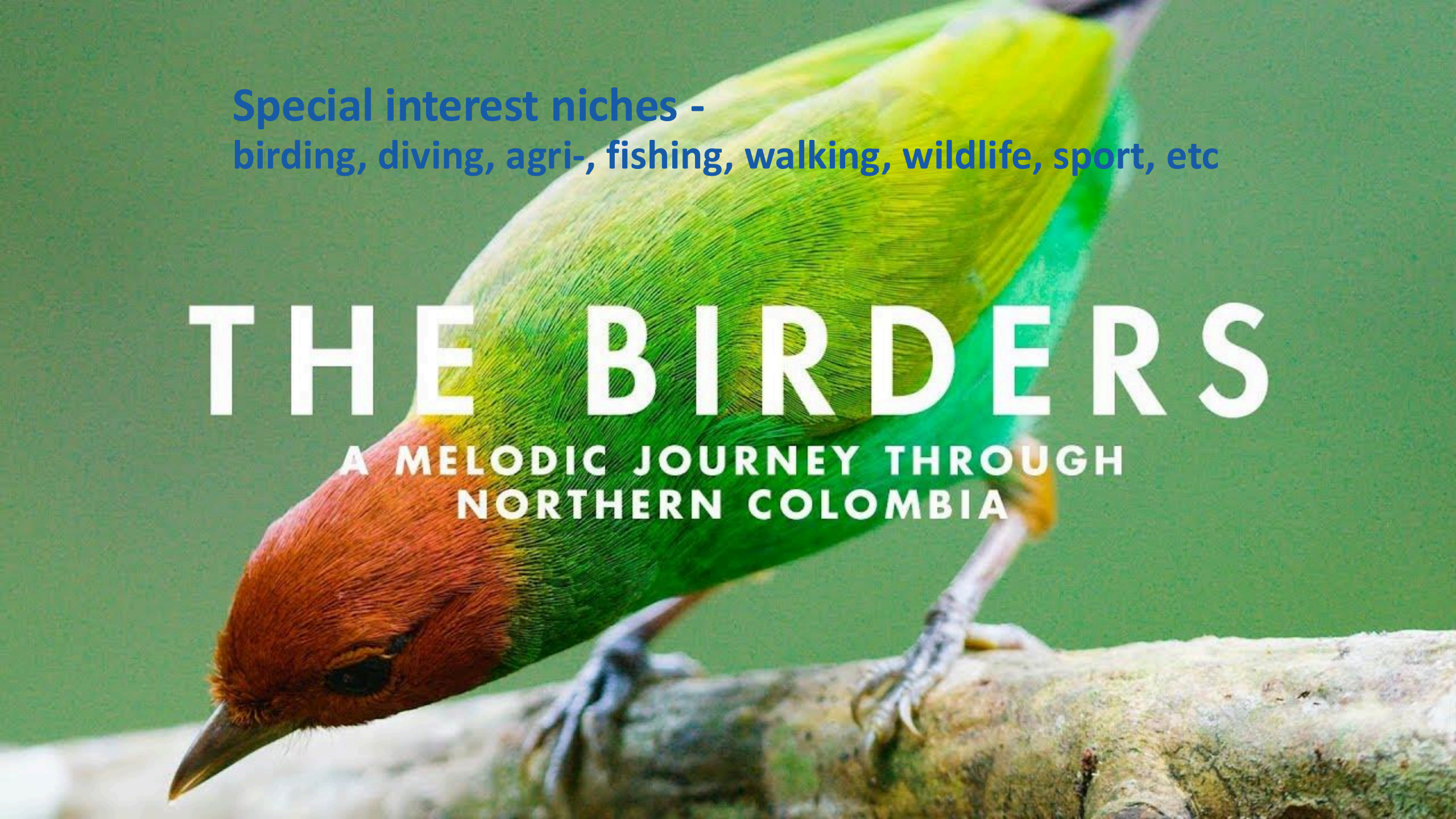
Solo … but not per se alone (tribes)





Redefinition and feminisation of luxury

Influenced by Gen Y/Z & Female (Solo) Travel


Special interest niches -
birding, diving, agri-, fishing, walking, wildlife, sport, etc
THE BIRDERS
A MELODIC JOURNEY THROUGH
NORTHERN COLOMBIA


Multi-gen travel

Health, wellness & sports holidays



Quiet travel / hushpitality

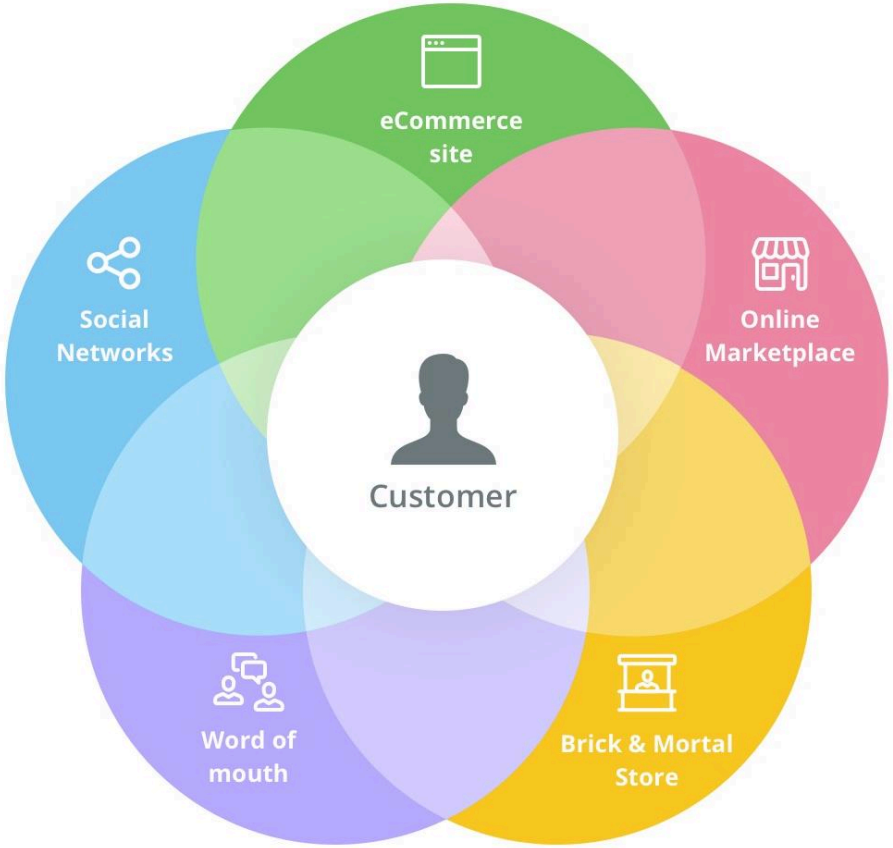


sensory experience of
silence and seclusion

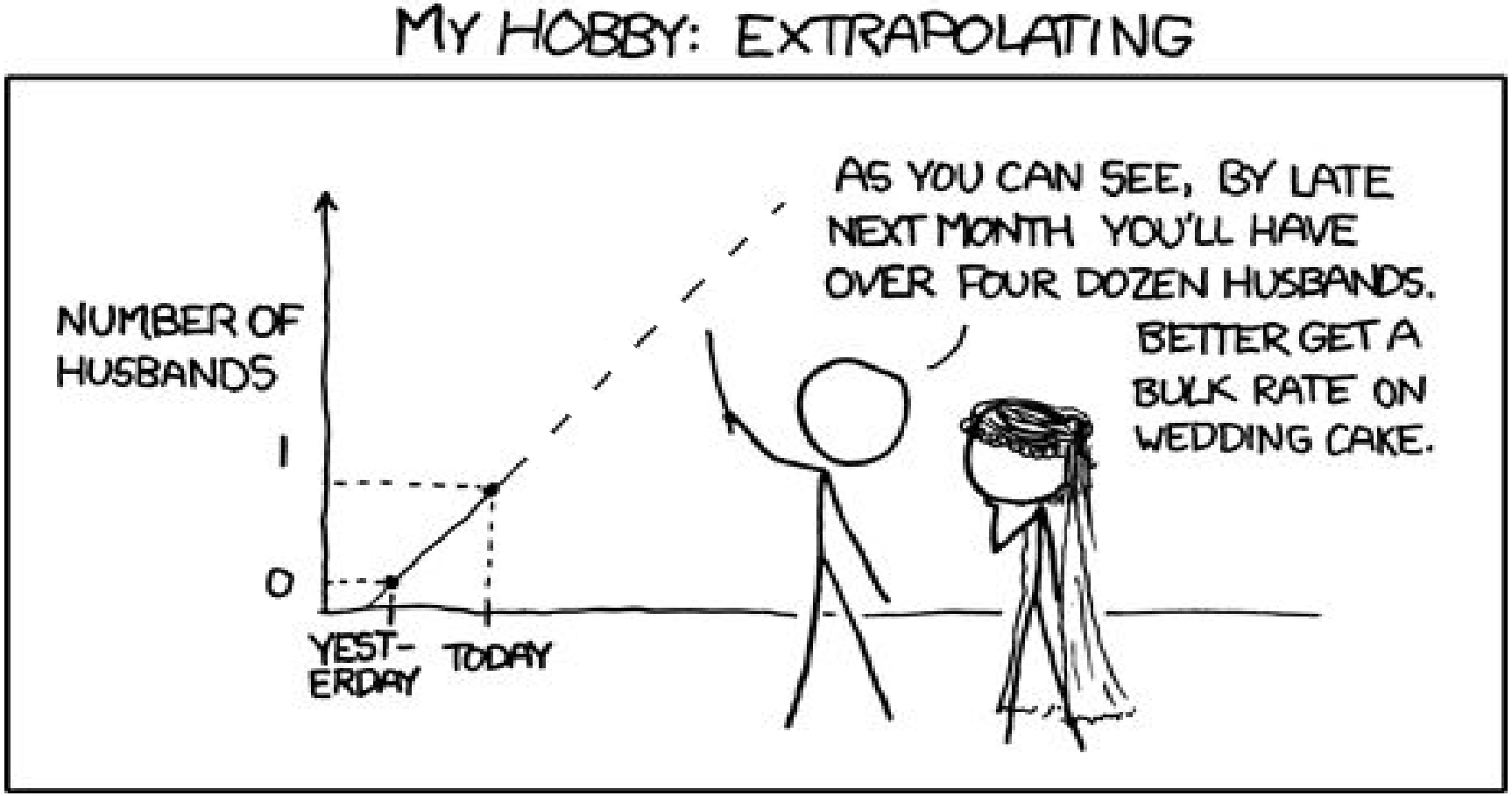
transformational and
experiential travel

Demand for seamless customer journey





The future: a continuation of the present ?




2035 …
2040 …
2050 …
Imagine …



Environmental developments affecting tourism

(macro trends)









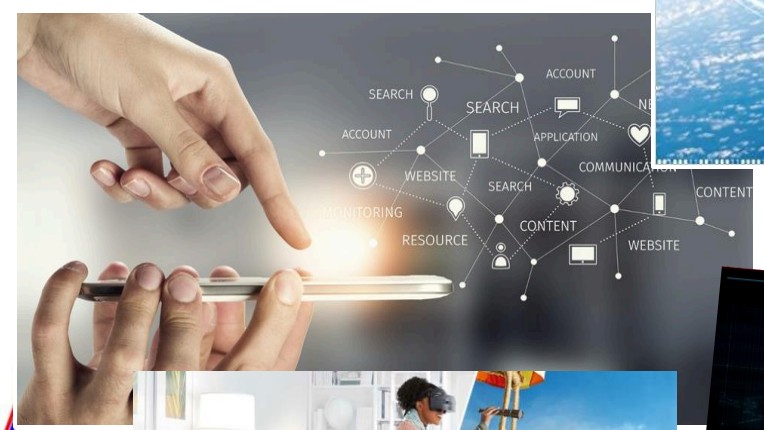




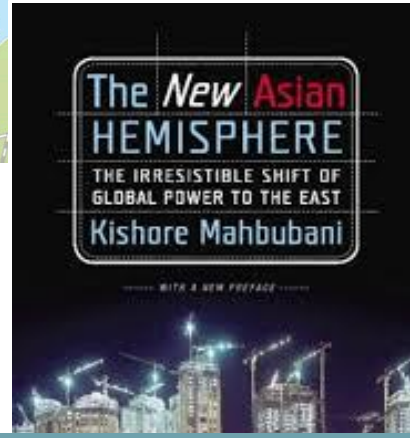


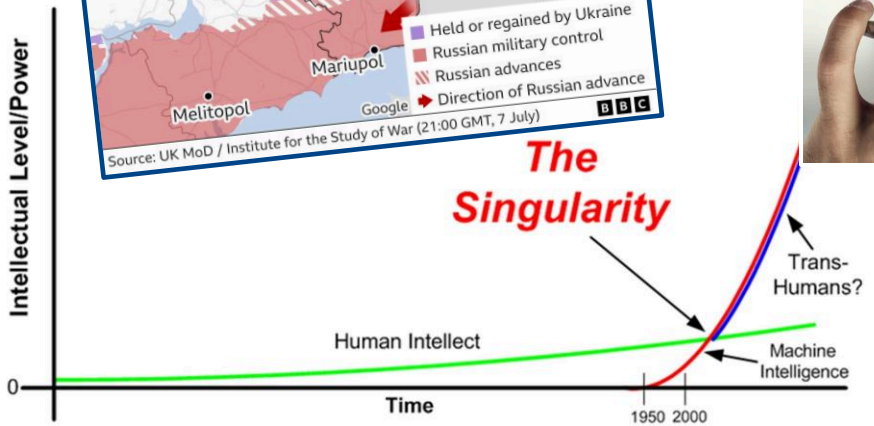










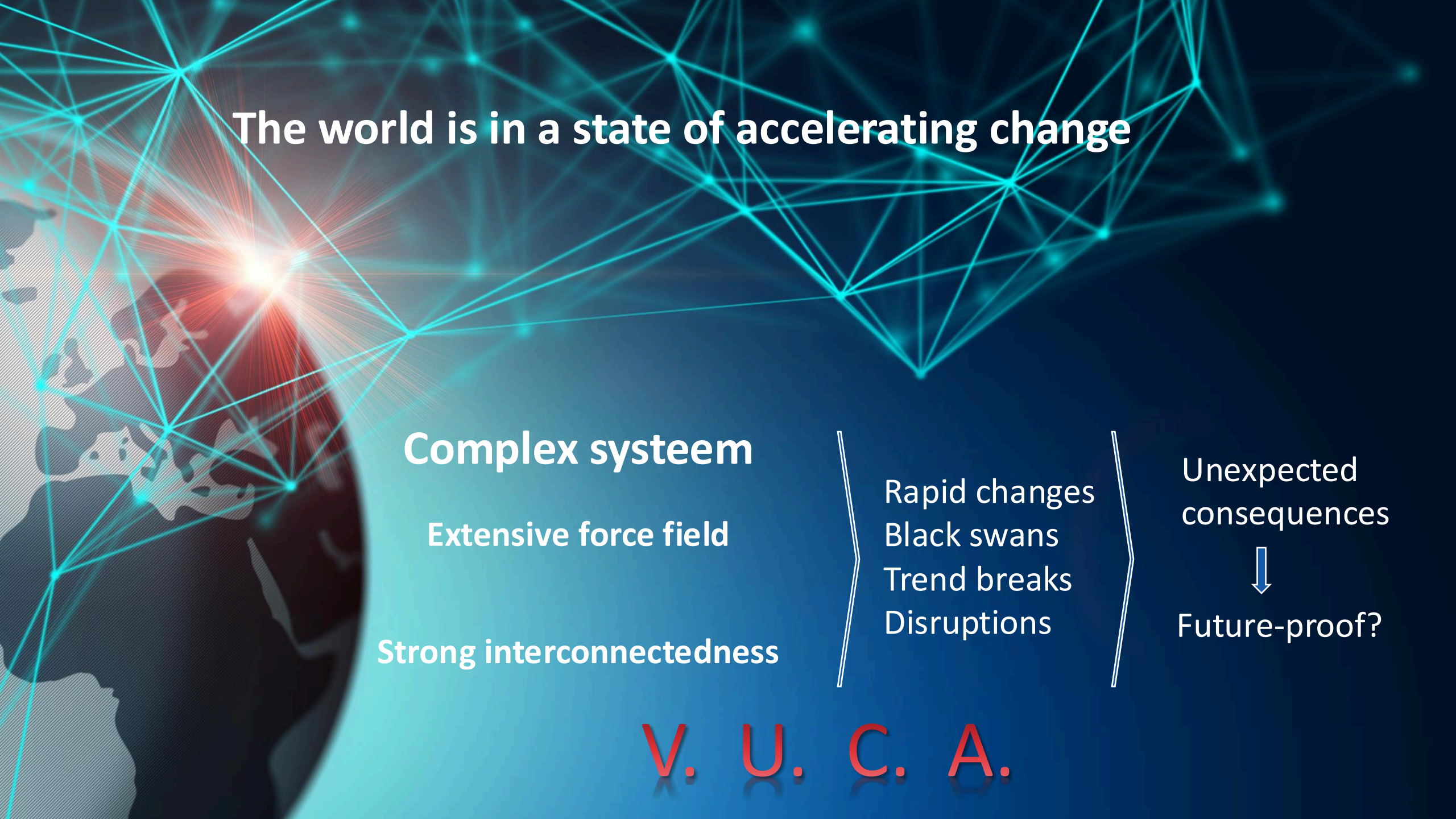






THE FUTURE OF WORK

Robots, AI, and Automation



The world is in a state of accelerating change

Complex systeem

Extensive force field

Strong interconnectedness

Rapid changes
Black swans
Trend breaks
Disruptions

Unexpected consequences

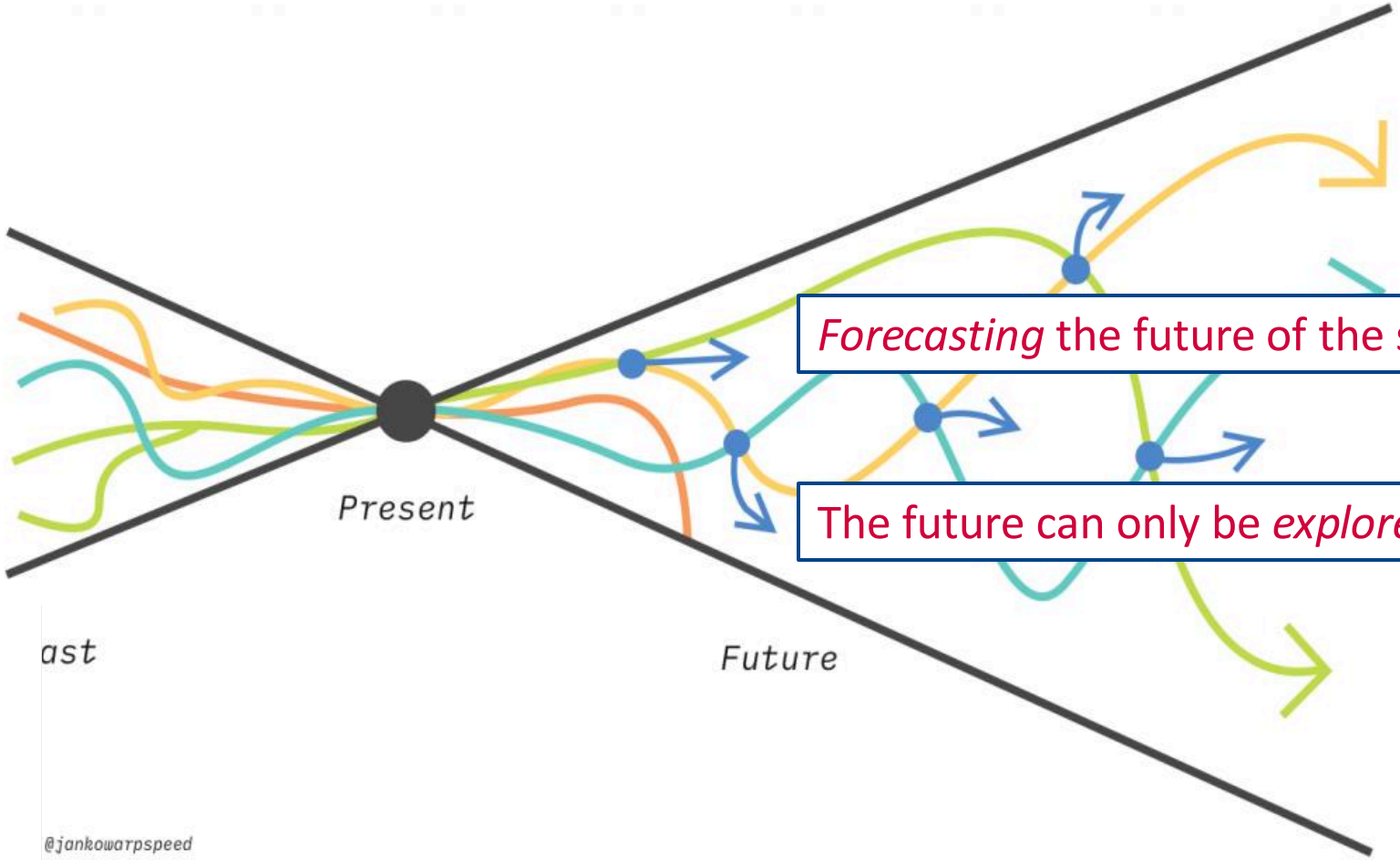
⇩

Future-proof?

V. U. C. A.

Most likely, the future will not be a continuation of the present

The future is plural, non-linear and not predefined



Forecasting the future of the system is impossible

The future can only be *explored* → scenarios

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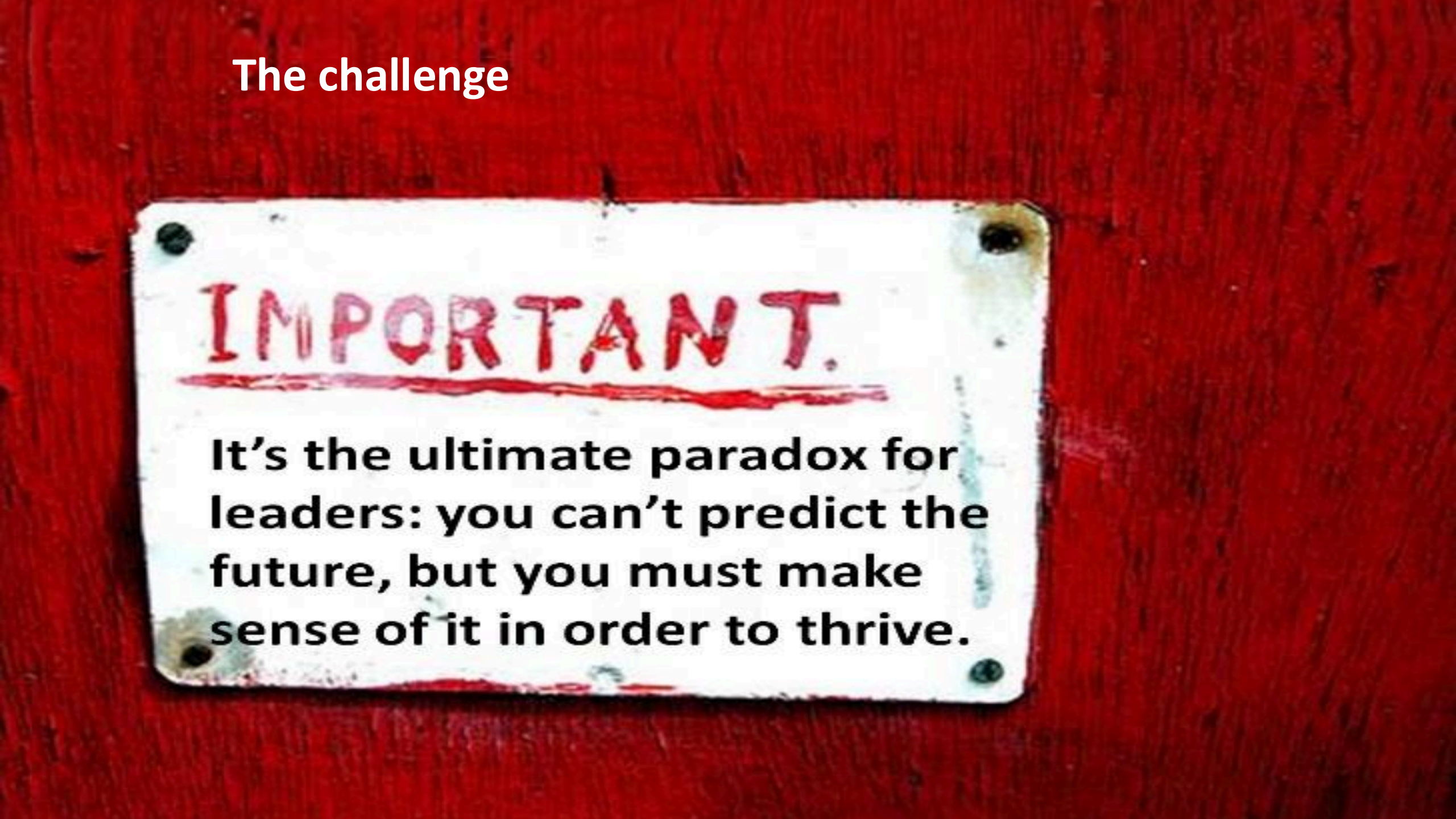
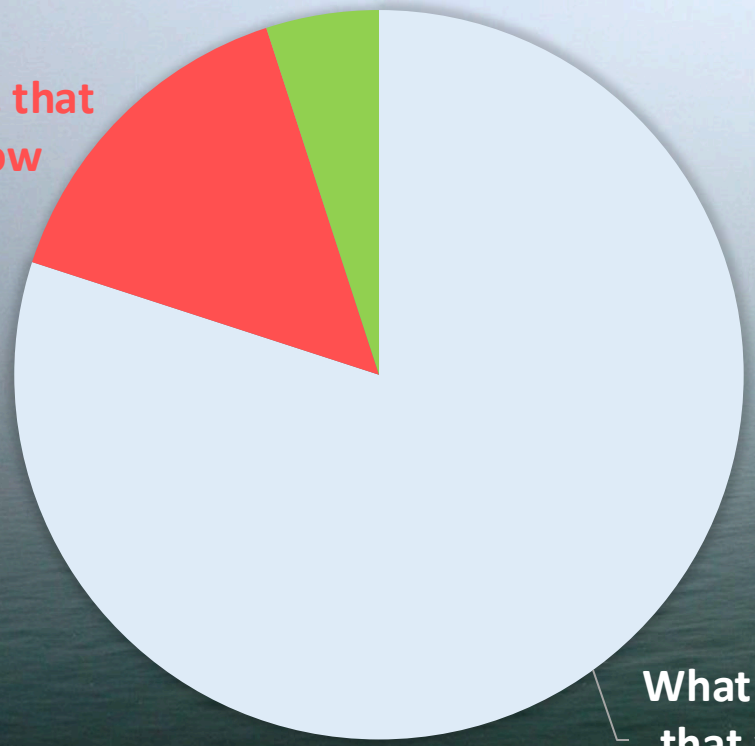
The challenge



Little we know: the unknown unknowns



And …
most of our knowledge is about the *past*, but all our decisions are about the *future*

Based on Johari Window

From: Conway,M. (2003). An introduction to scenario planning. Foresight methodologies workshop. Futures Thinking.

Little we understand: bounded rationality



Dominant thinking
(paradigms)

Lack of creativity

https://youtu.be/47rQkTPWW2I

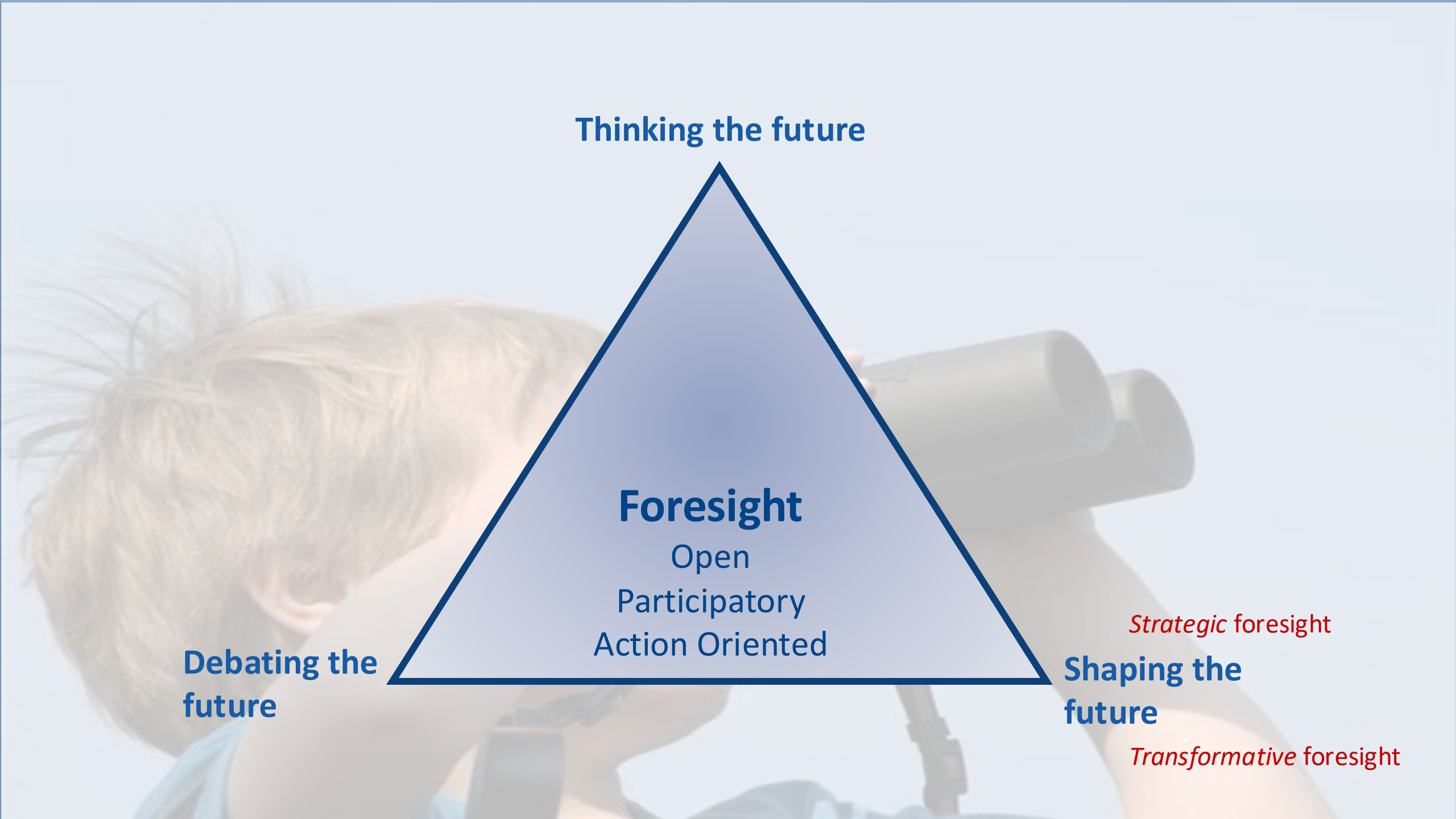


So, how do we get to understand and prepare for the future?

Foresight: a competence

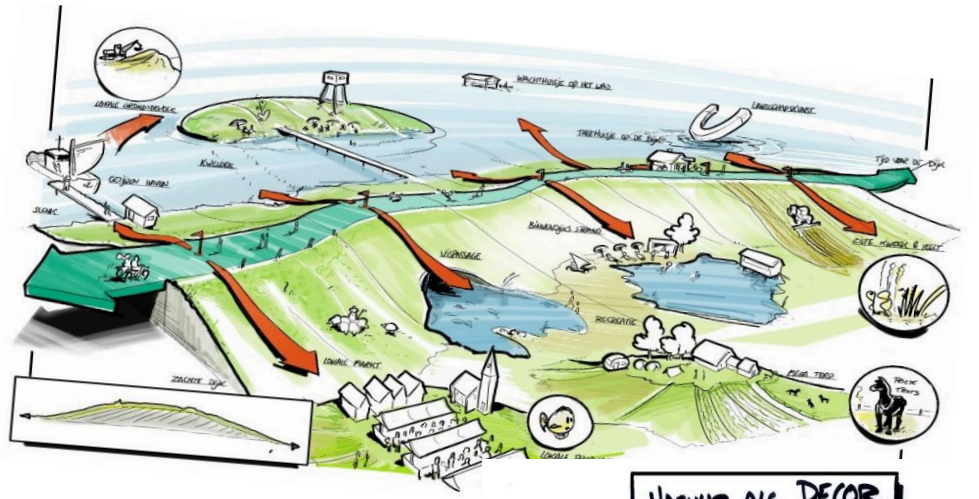
"Foresight is the ability to take a forward view, which enables action to be taken with reference to, and within the context of the future".




Thinking the future
Foresight
Open
Participatory
Action Oriented
Debating the future
Shaping the future
Strategic foresight
Transformative foresight

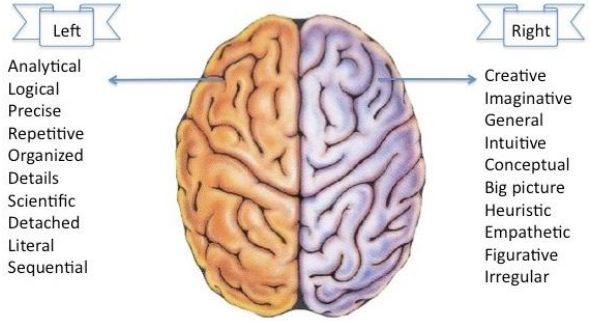
Explorative scenarios

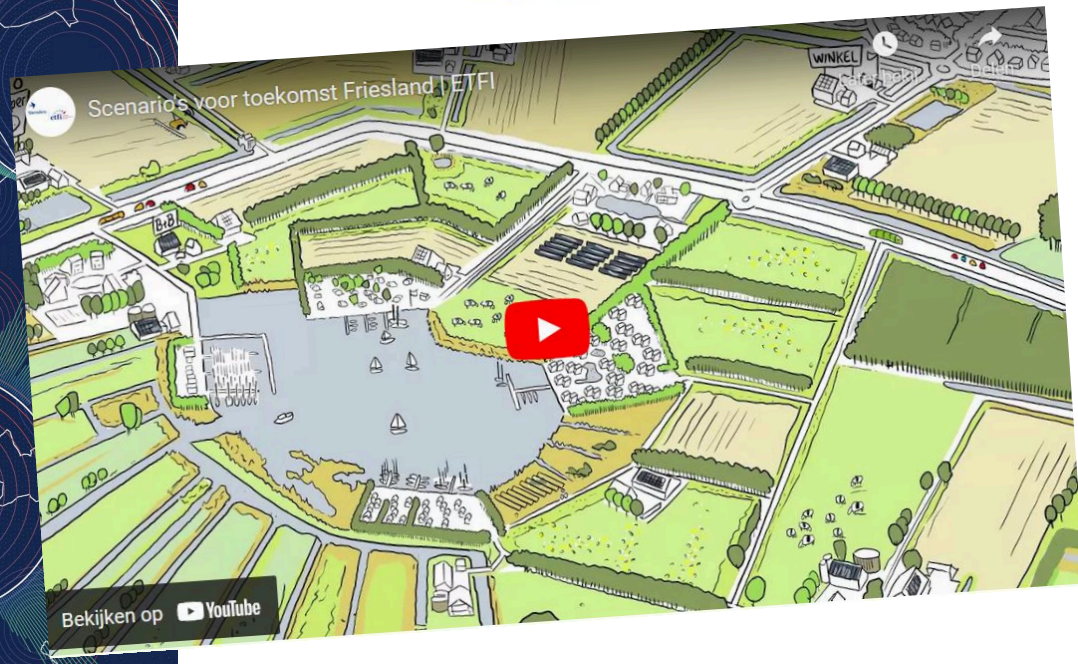
hypothetical, plausible, realistic, and appealing narratives about the future, supported with images











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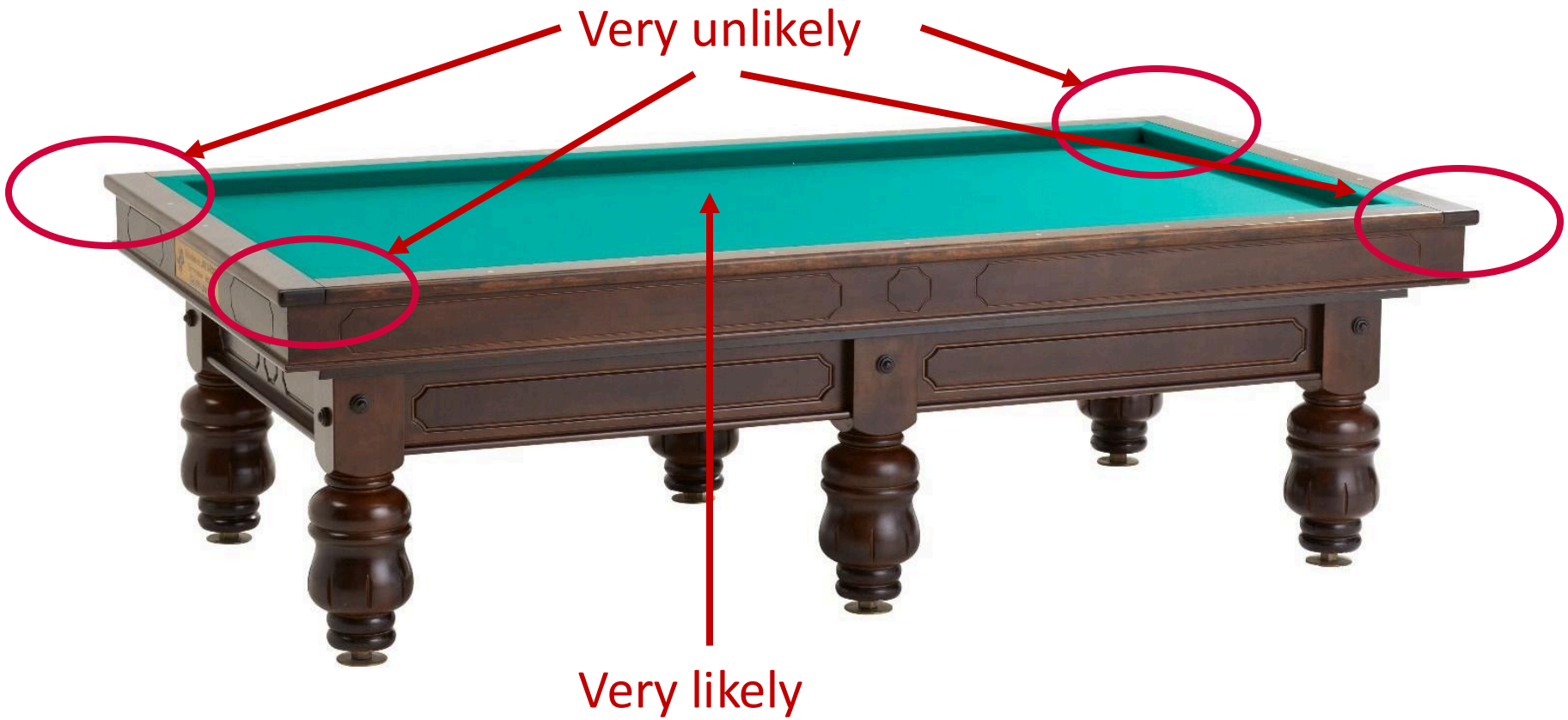
Scenarios delimit the future playing field



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Scenarios act as a point of inspiration



- New vision
- New strategy
- New concept
- New business models
- Etc

To *anticipate* change

To *withstand* uncertainty

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Adaptive capacity

Rethink the future of your destination/ organisation/bu siness

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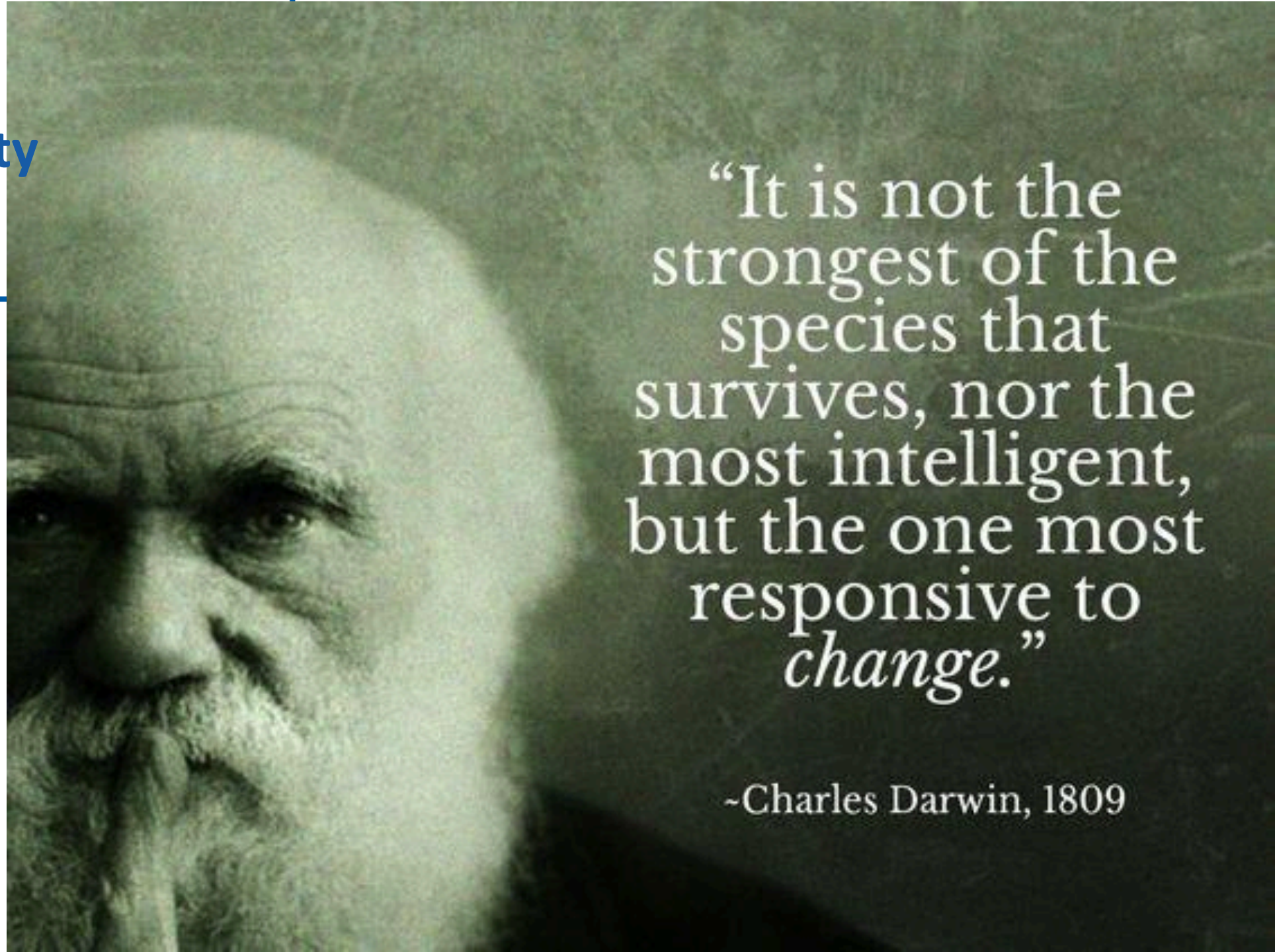
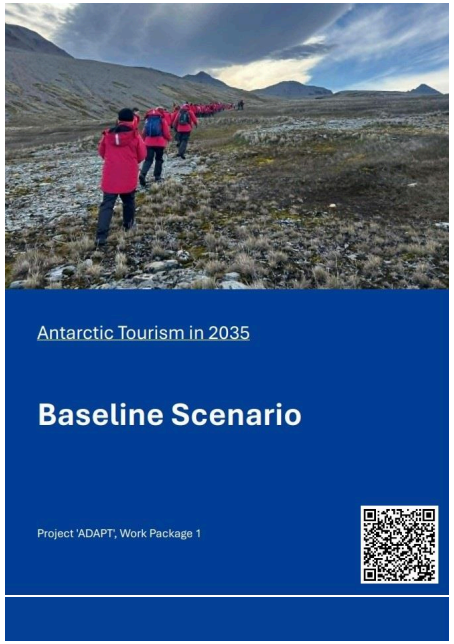
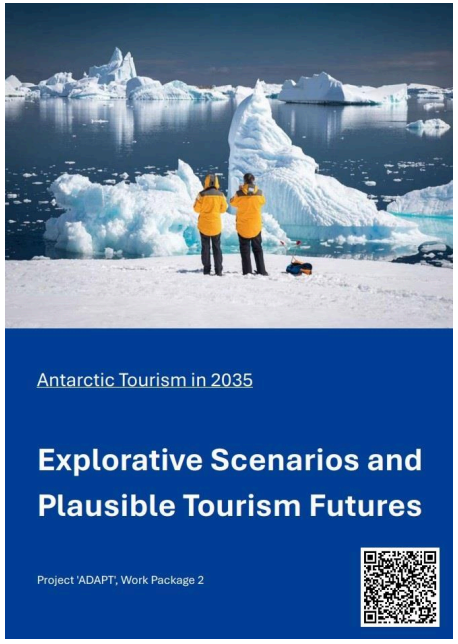
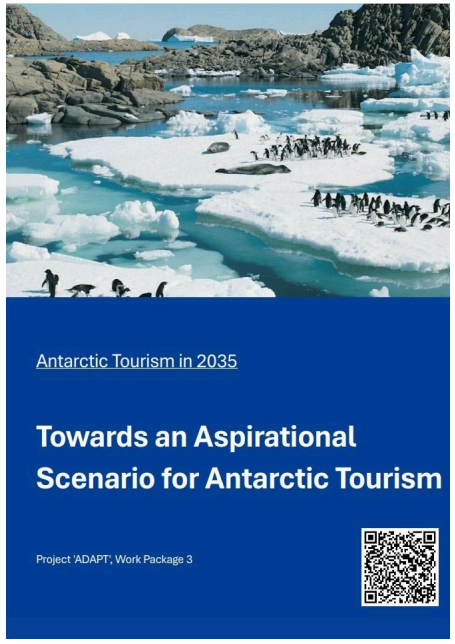


Scenarios for Antarctic tourism (ADAPT project)

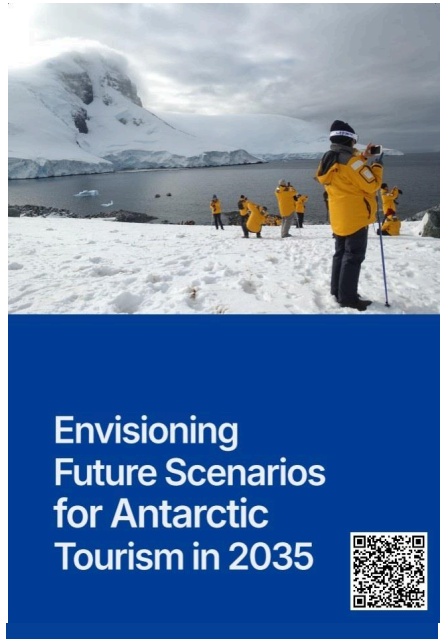
Adaptation pathways through knowledge co-production to anticipate Antarctica's uncertain tourism futures

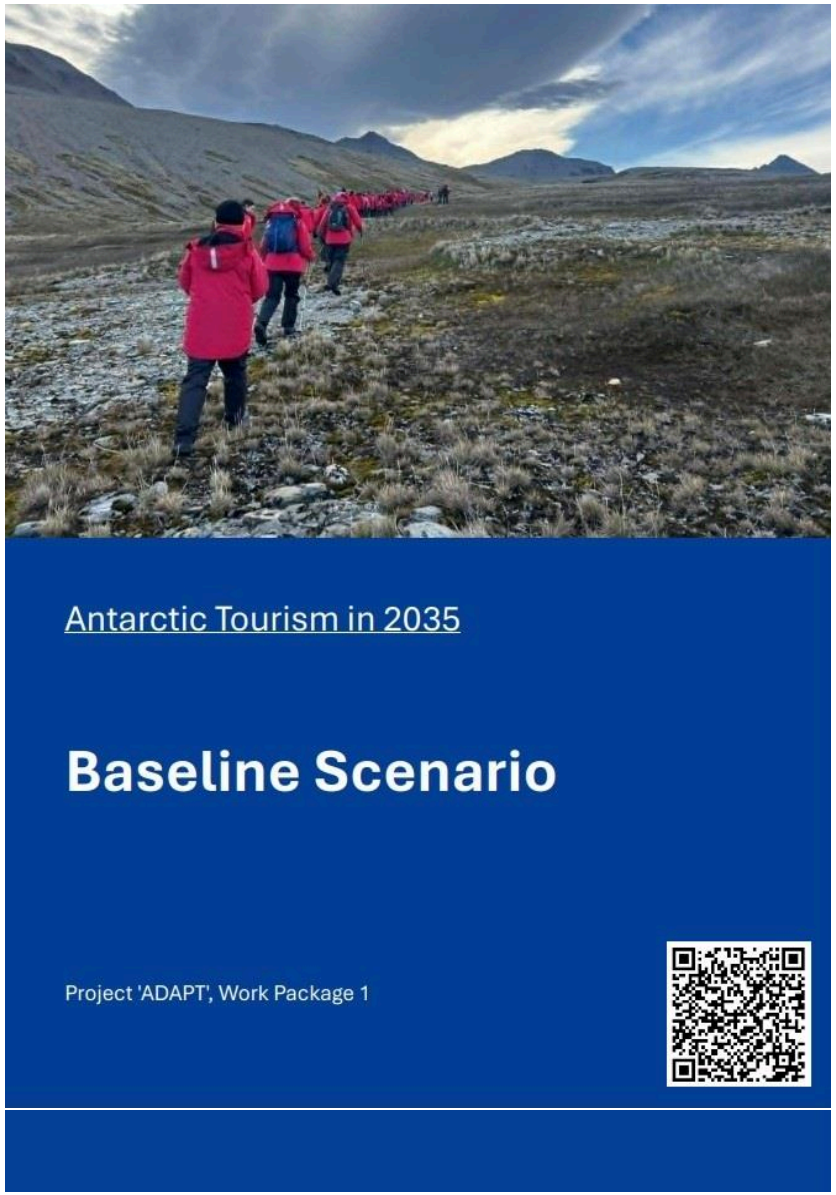












Continued growth, more diversity, more dispersal

Key elements :

- **Social media** driven demand stays the strongest driver
- **Access** becomes easier and more varied
- Strong **growth** and **diversification** of operators
- **Environmental pressure** becomes the central concern
- **Governance fails** to keep up
- **Monitoring** improves but not enough

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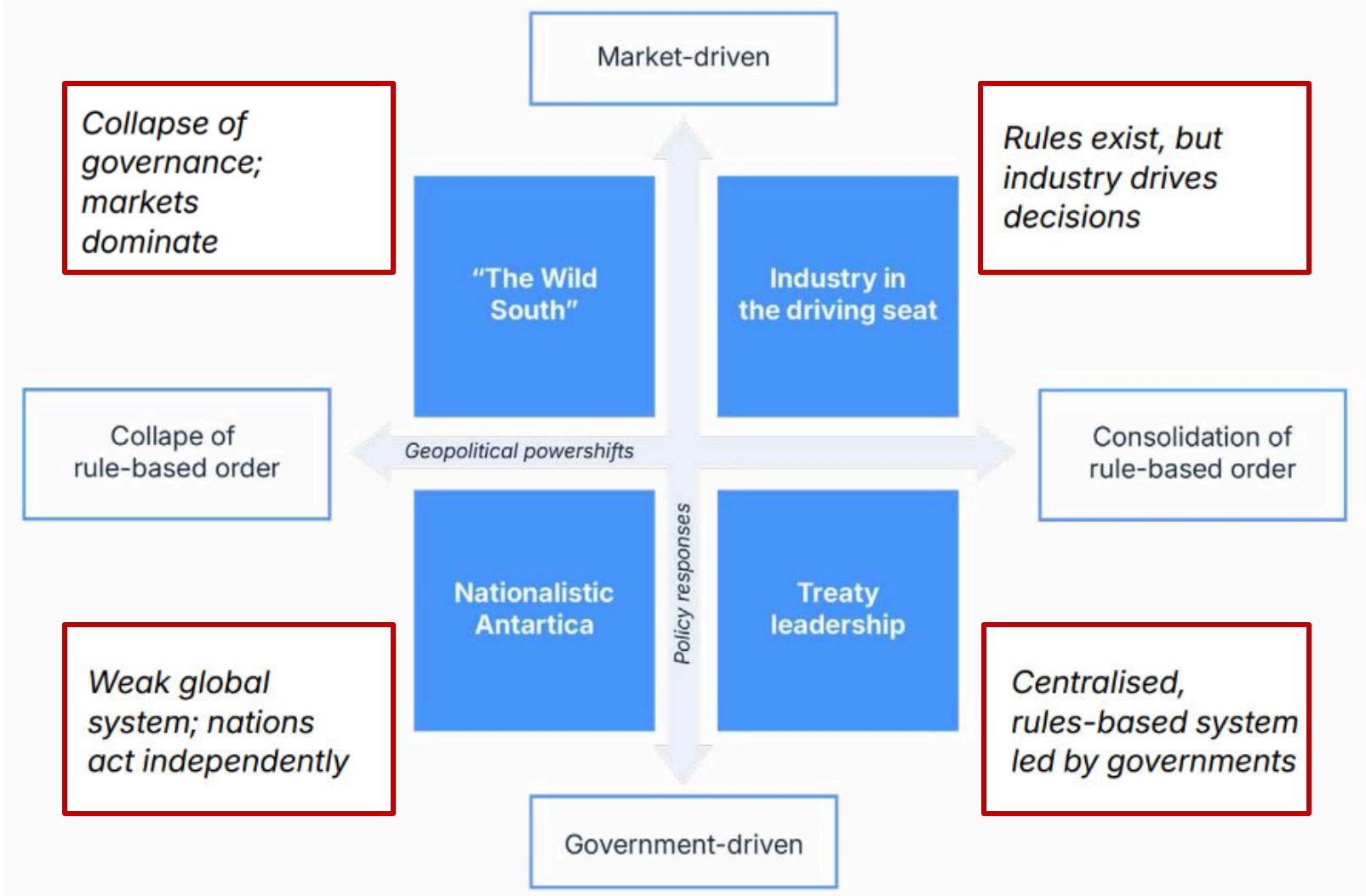

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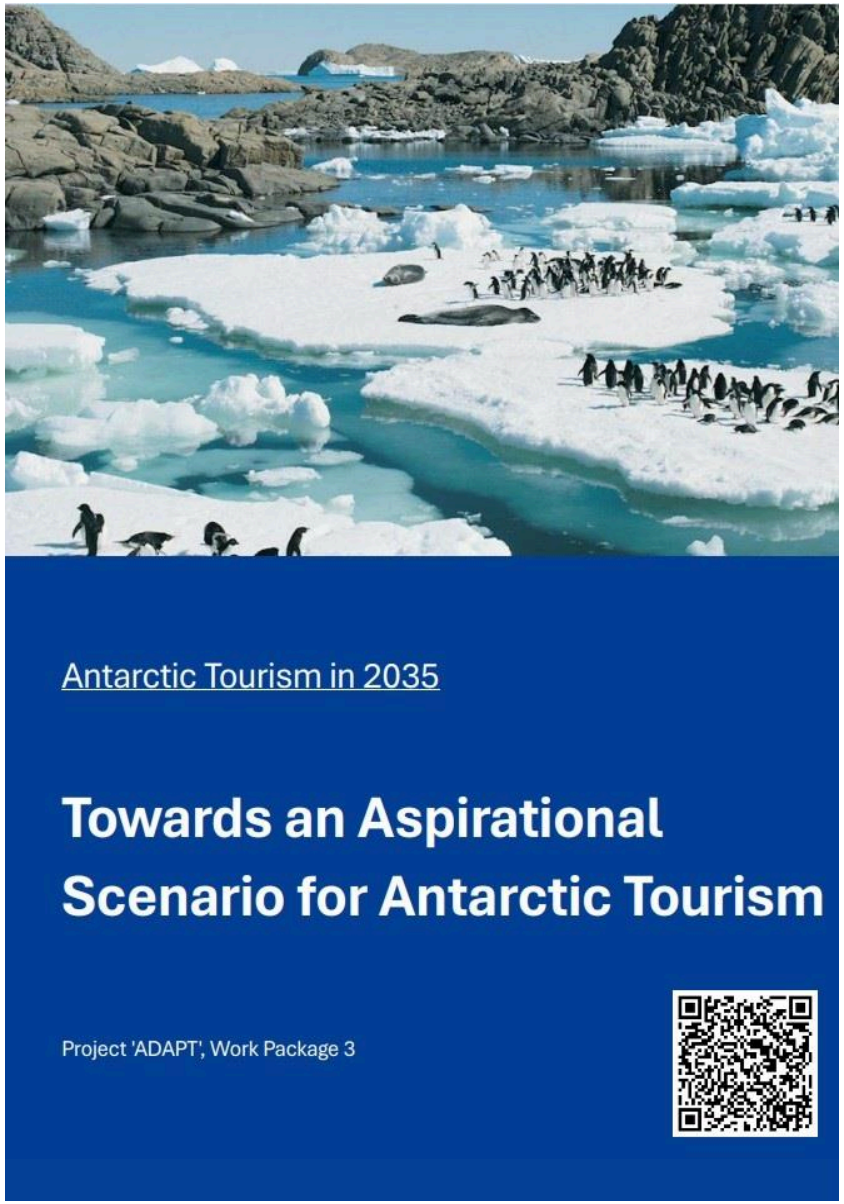
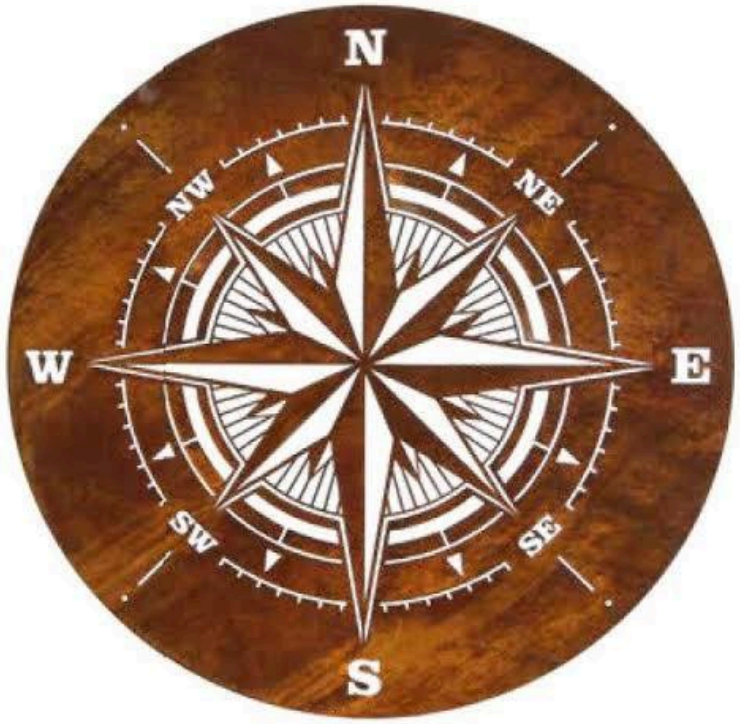


Guiding direction, long term vision



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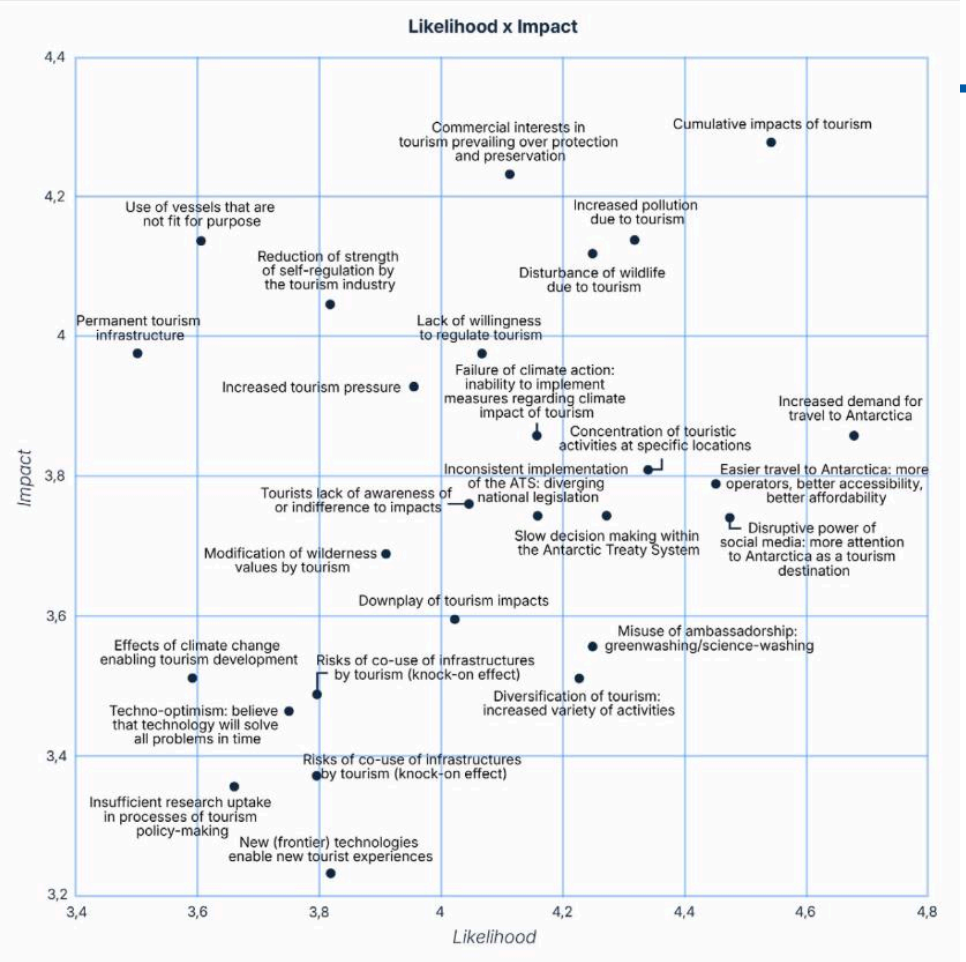
Antarctic Tourism in 2035

Risks based Scenarios for Sustainable Antarctic Tourism Futures

Project 'ADAPT', Work Package 4

Identification, analysis and assessment of 27 risks



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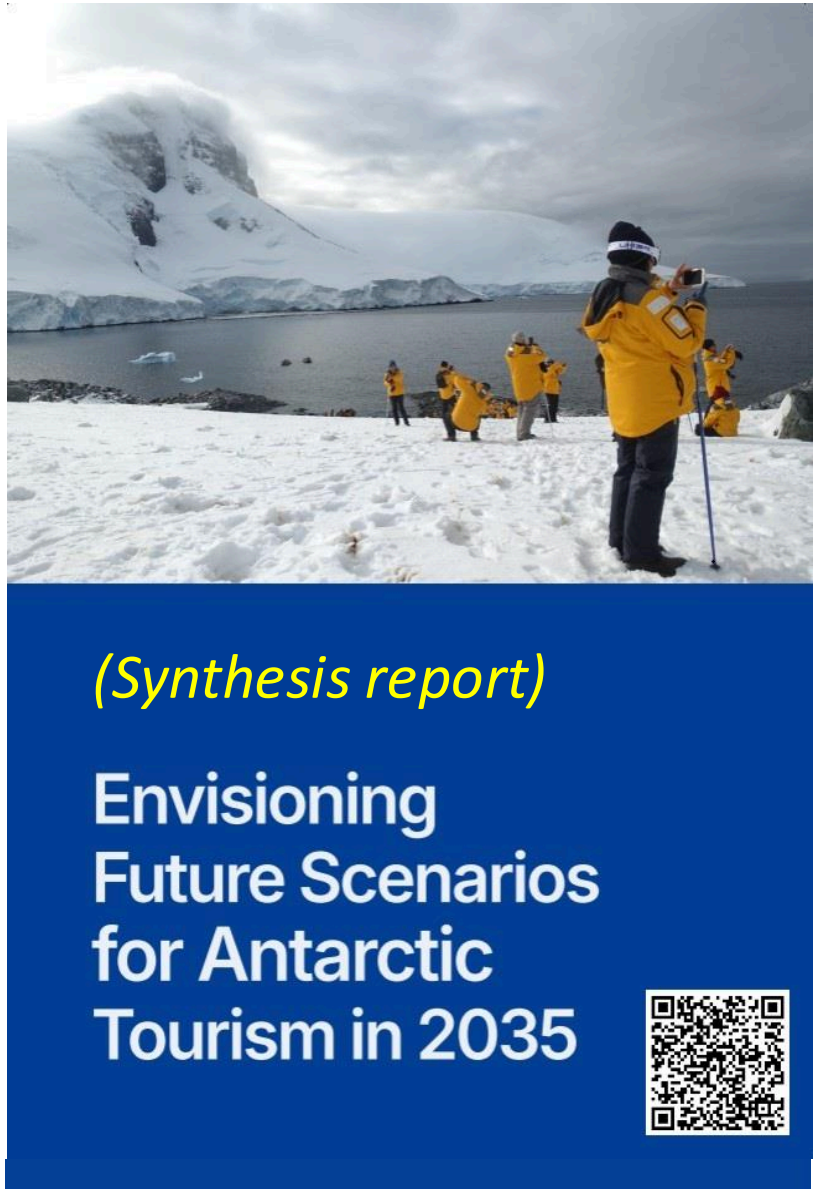

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Conditions for Antarctic tourism management

- **Diversify:** Keep multiple future scenarios open.
- **Explore:** Stay objective, neutral, and open-minded.
- **Focus:** Target choices toward the long term.
- **Navigate:** Manage complex, fragmented decision-making.
- **Balance:** Match preferred outcomes with practical feasibility.
- **Learn:** Adapt continuously using ongoing scenario planning.

Driving forces of change European tourism

(ETC foresight study by ETFI)



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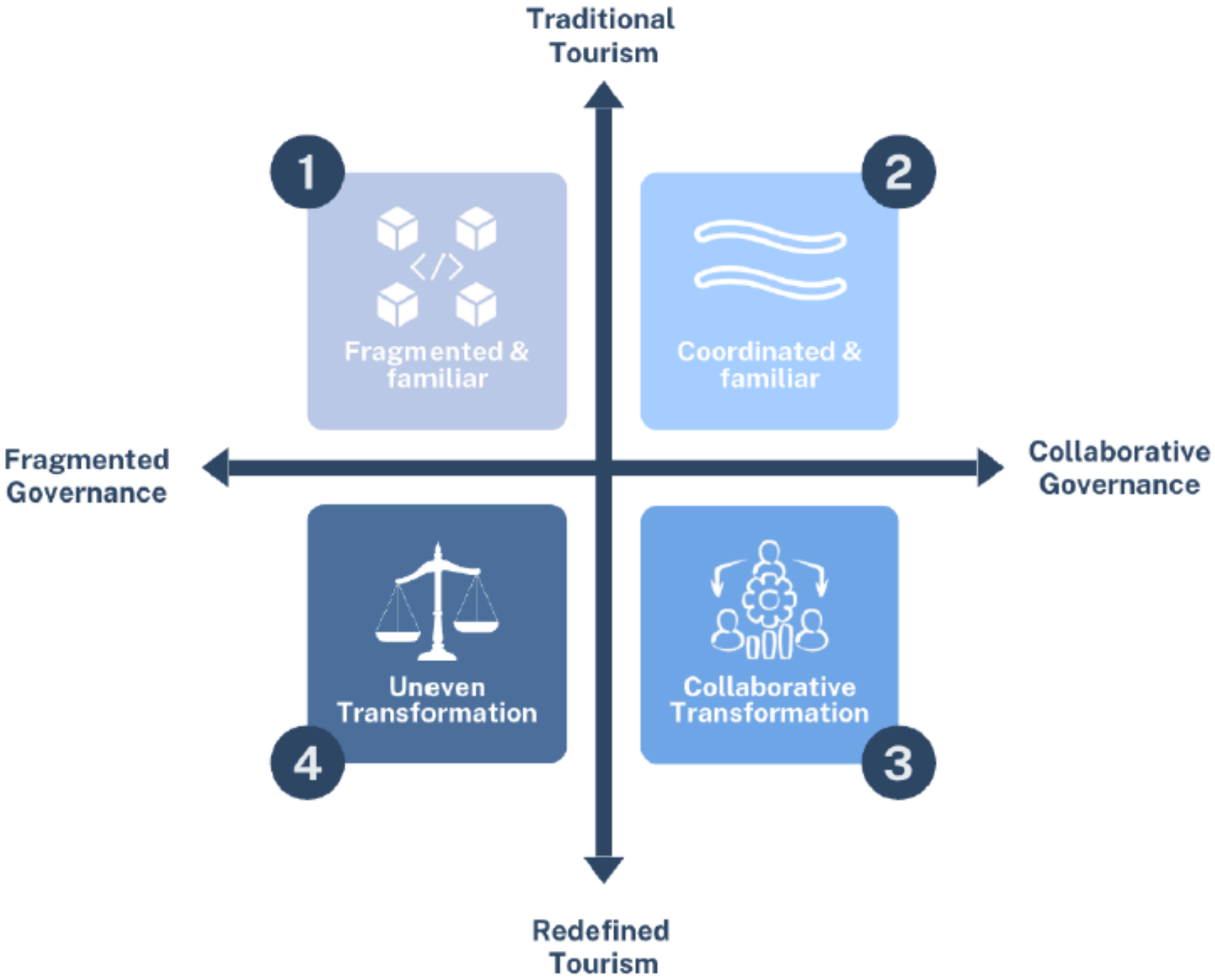
https://shorturl.at/oLI6I

Scenarios for European tourism



Lessons for European destinations

- **Collaborate:** Bridge fragmentation gaps.
- **Reduce:** Lower destination-level climate risks.
- **Mitigate:** Strengthen climate actions sector-wide.
- **Empower:** Build systems to support SMEs.
- **Support:** Help SMEs create heritage experiences.
- **Show:** Make local impacts highly transparent.
- **Partner:** Gain online visibility through tech.
- **Monitor:** Track future trends and adapt (futures lab).

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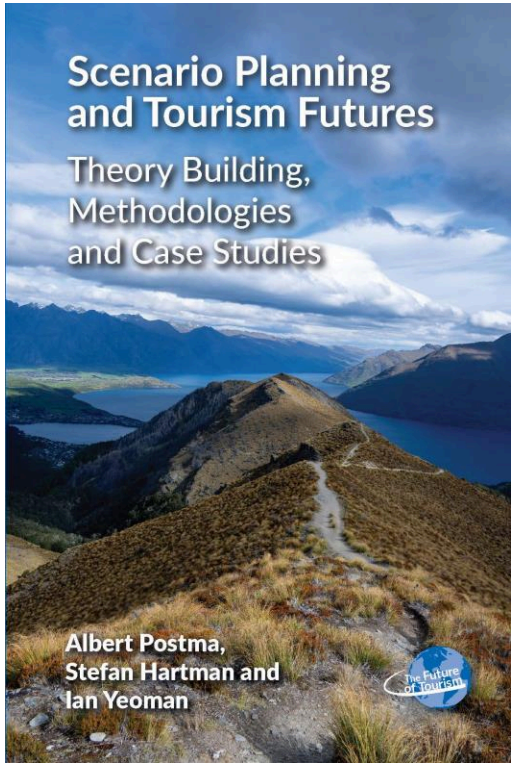

Thank you for your attention



Scenario planning by ETFI in practice, e.g.



