

# University of Pretoria

## AN ASSESSMENT OF THE IMPACT OF MEGATRENDS IN THE TOURISM SECTOR

Research Project 2018-2019

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# Overall aims of the study

**Aim 1:** To identify and analyze global shifts and megatrends that impact the tourism industry in South Africa

## Our methodology

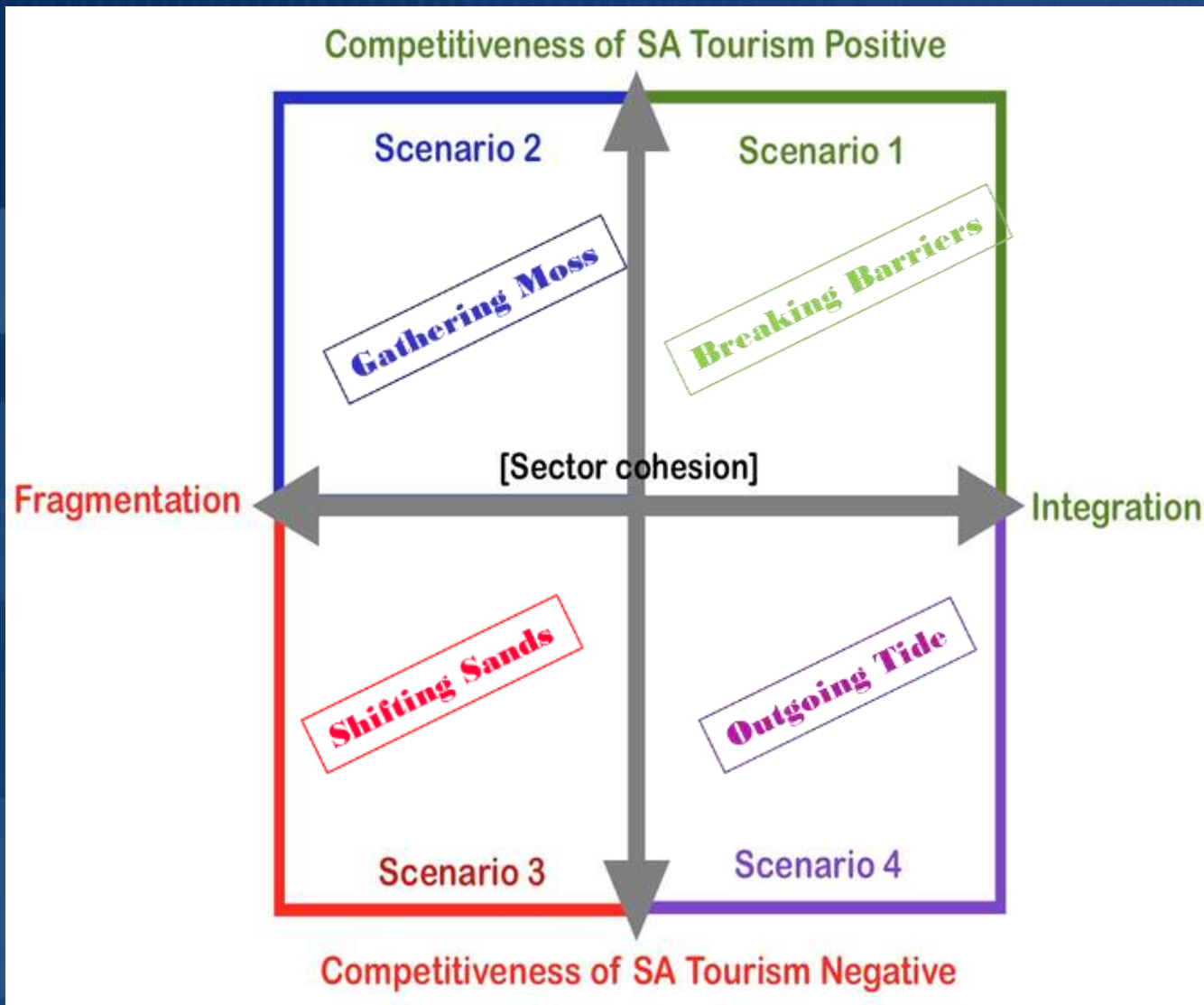
- Literature and secondary sources }
  - Evidence-based data }
  - Interviews: industry/govt experts }
- 5 Megatrends
- Key uncertainties/ assumptions }
  - Workshop }
- 4 Scenarios



# Outcome

- Five mega-trends that impact SA's tourism sector:
  - Economic
  - Political
  - Social
  - Technological
  - Environmental
- Four scenarios for South Africa's tourism future





**Aim 2:** To develop a framework that will enable the sector to proactively respond to the challenges of the impacts of mega-trends and capitalise on opportunities for future development of sustainable tourism over time.

## Our methodology

- Practices in other countries
  - UK, Scotland, Australia, Qatar, Finland
- Literature on models and best practices
- Interviews industry and Government tourism experts, locally and abroad
- First draft theoretical model
- Workshops to refine and test the Model



# Building the model for a sectoral response to megatrends

Linked a futures approach to strategic thinking at a sectoral level  
Strategic planning in tourism is not easy because tourism is a complex system:

- Composed of several interacting elements
- With multi-stakeholder activity that necessitates collaboration
- Where sustainability is a vital part of tourism growth and development
- Influenced, at every stage, by external signals, and
- Process-driven, sequential, dynamic and iterative.

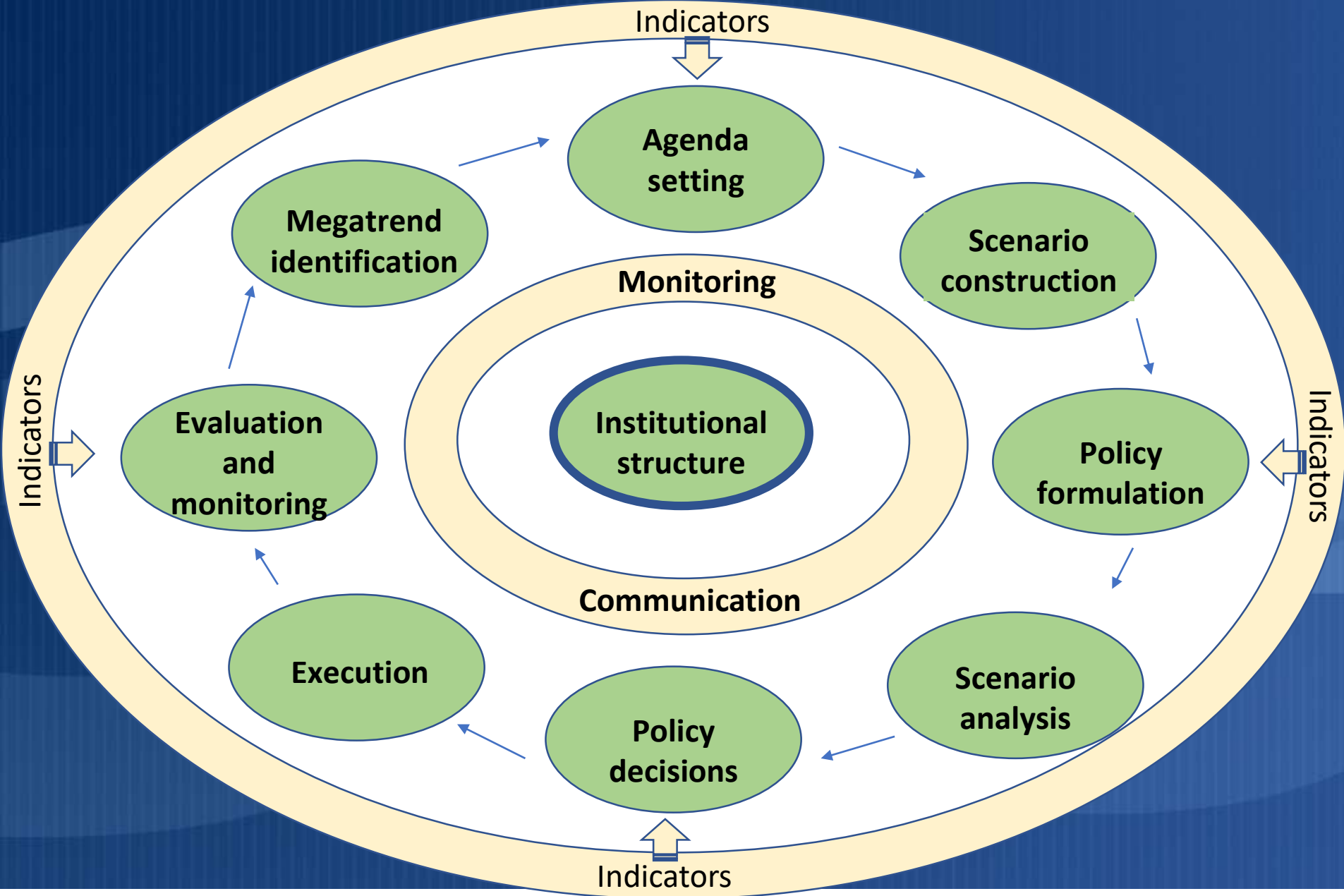


# Outcome

## Framework/Model:

- **Formal structure driven at the highest level**
- Reflecting **multi-stakeholder collaboration** as central to the process
- Demonstrating a continuous, dynamic and iterative **process**
- **Purpose-driven and intentional**
- Made up of several interacting components
- Influenced at every stage by external **signals**
- Highlights continuous open **communication**







- Formal, permanent core unit (examples)
- Driven at highest level
- Strategic Planning Forum
- Representation
  - Industry
  - Whole government
  - Government (multi-levels)
  - Research Institutions/Academics
  - Communities
  - *Ad hoc experts (dependent on trend)*
- Conflicting objectives



**Indicators /  
Signals**

**Emerging trends**

**Indicators /  
Signals**

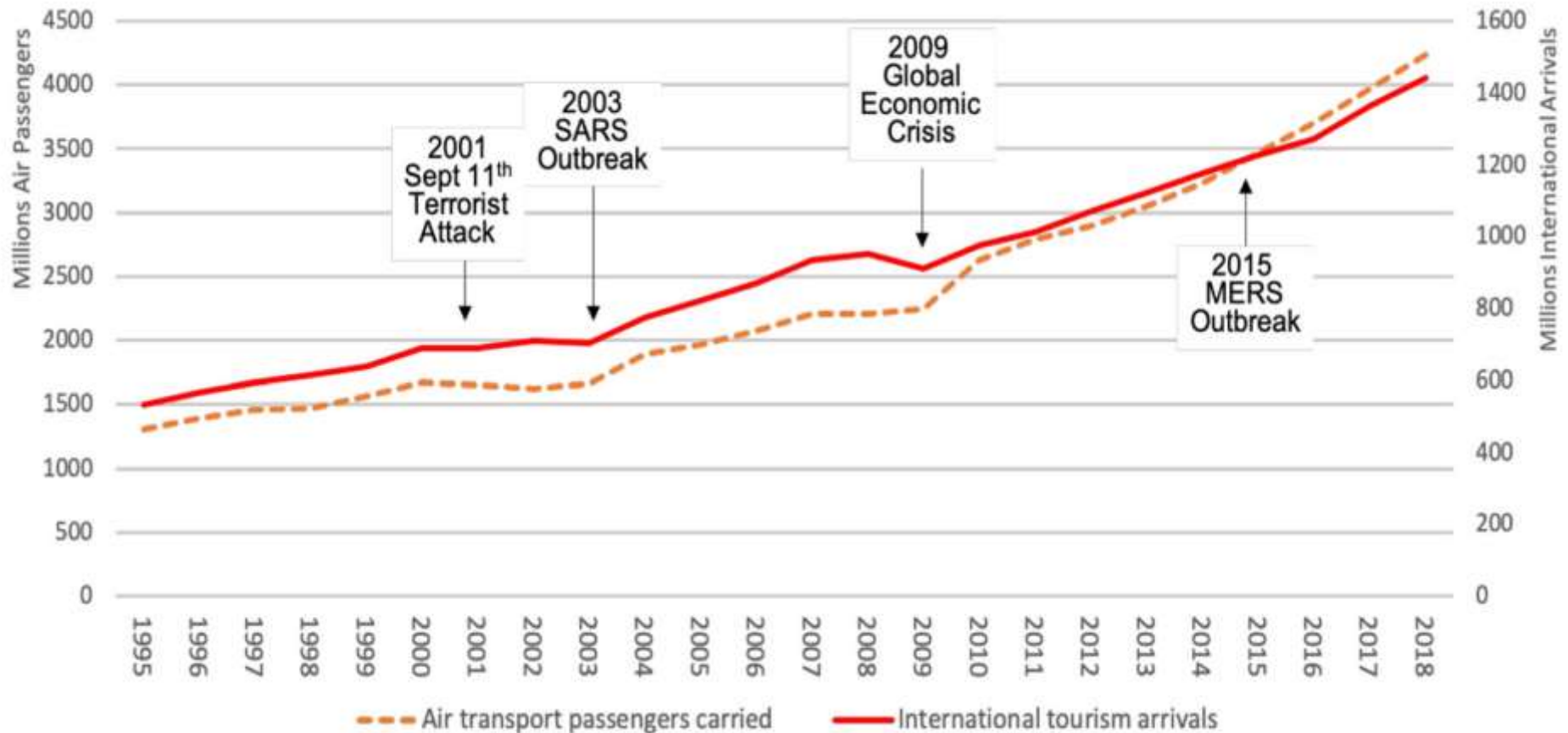
**Early warning signs**

**Weak signals**

**Wild cards**



# Impacts of major crisis events on global tourism

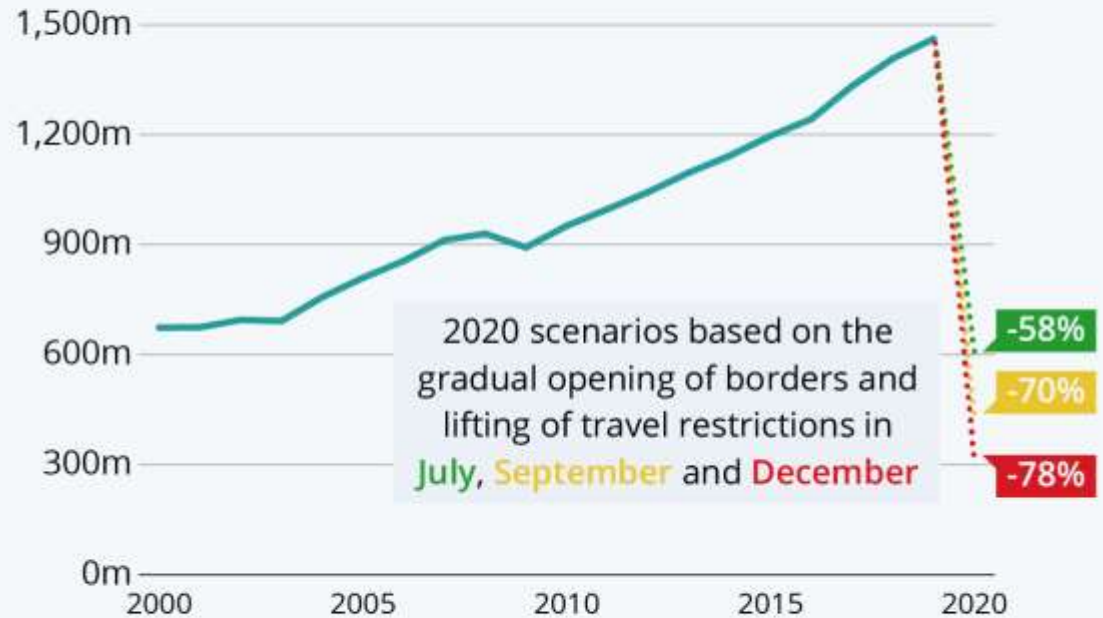


Source: World Bank (2020)

COVID-19  
LOCKDOWN!

# Global Tourism to Suffer Crushing Blow in 2020

International tourist arrivals worldwide since 2000



Source: UNWTO



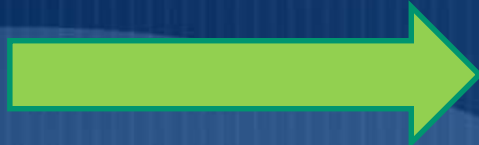
statista





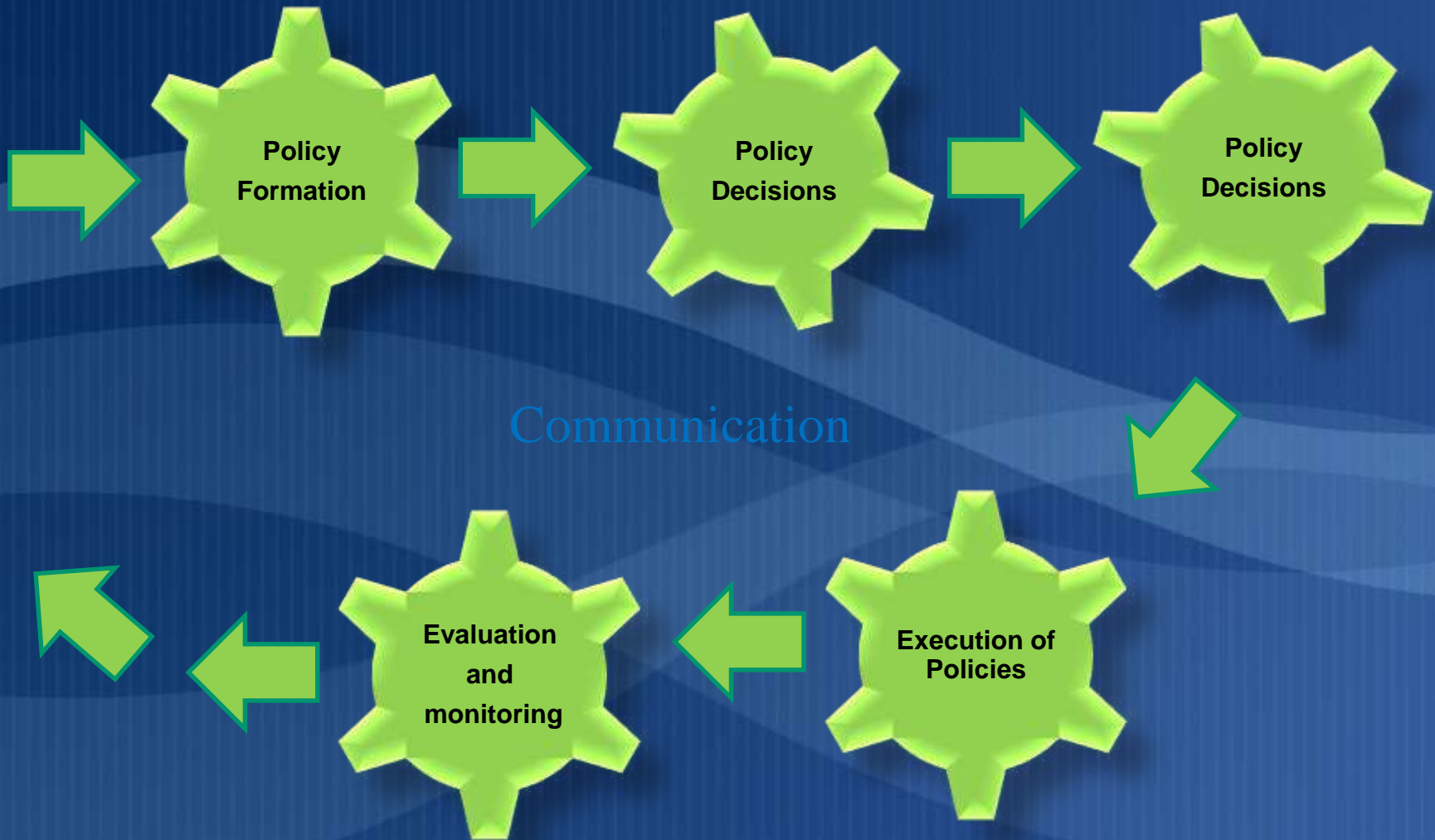
- **Economic**
- **Political**
- **Social**
- **Technological**
- **Environmental**

- **Assess probable magnitude**
- **Prioritise mega-trends**
- **Set overall policy goals, regulatory framework**
- **Adopt long-term approach**
- **Use evidence to build scenarios**



**Visualise the future through alternative scenarios resulting from a combination of trends and policies, allowing policy-makers to involve multiple stakeholders and test policies against scenarios.**





# Conclusion

2020

**What could have been  
different?**





# THANK YOU

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