Destination Safety and Dutch Tourism Flows

The relationship between geopolitics, destination security and its impact on Dutch out-bound tourism

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1. Background Information

The issues being dealt with in this report revolve around the risks and perceptions of risk inherent in travel. Travel always involves an element of risk but in the last five years these risks both actual and perceived have increased significantly. The issue of destination security and how safe customers feel before or after they have booked have become a more important part of the tourist buying decision. A realisation has grown on the part of the traveller regarding new levels of threats. The all important element of destination security and order can be compromised in a variety of ways, by internal conflict, civil unrest, terrorist attacks, or by tension or conflict with neighbouring states. Once one or a combination of these factors manifests itself, the image of the destination regarding tourism is compromised and tourism flow losses and switches to other destinations perceived as more safe will occur. This phenomenon is prevalent in the outgoing tourism market at the present time and will continue to be in the future. It is this phenomenon that can prove problematic to destinations, tour operators and also the tourists themselves because these incidents can be sudden, shocking in nature and consequences are profound and immediate; both in terms of human losses and in terms of the tourism flow switching behaviour they cause.

In spite of the growing risk levels global tourism shows no signs of declining. In 2017 the World Travel Monitor estimates that global outbound tourism will grow by 3.9 percent. The Dutch outbound tourism market also looks set to grow by an even larger figure of 6 percent according to the same report.1 What is however certain to decline is Dutch out-bound tourism to destinations perceived as unsafe and insecure. Although flow shifts are based on factors ranging from marketing, prices, currency exchange rates, and attractiveness it is clear that destinations which have had a recent history of political violence have suffered. Destinations that face the high threat levels are those in the Middle East North Africa (MENA) region and to a limited extent those in Europe.

The general aim of this research project has been to examine this phenomenon of tourism flow switching and consider the factors driving the geopolitical instability that can compromise destination security. On a more practical level the research has also examined what the reactions of Dutch tourists are to security threats affecting their tourism decisions and looked at the development of preventive measures against attacks by destinations and travel organisations. Finally, the research on the regional geopolitics of the MENA and European areas have together with the attitudes of Dutch tourists towards destination security been used as inputs into a scenario planning process involving the steering group of tour operators who originally commissioned this research, as participants. This process has focussed on macro environmental analysis, identification of key uncertainties, and the development of resilient strategies for the future.

2. Executive Summary

Travel risks both real and perceived are on the increase. Acts of terrorism, political unrest, and the effects of armed conflicts have led to destinations once considered secure, being increasingly perceived as vulnerable or insecure. One of the main drivers of these increased threat levels is geopolitical instability, which has sparked intra-state wars, internal conflict, contributed to the rise of terrorist organisations, and weakened the political stability of Middle East and North Africa (MENA) destinations. The following report provides an overview of the relationship between geopolitics and destination security, and the impact security issues have had on the destination choice of out-bound Dutch tourists. In doing so it aims to achieve four main research objectives.

1. Analyse the extent to which destination security is an important issue for Dutch tourists when selecting a destination and classify which customer segments are particularly concerned with security issues and what they expect from tour operators.

2. Identify which factors contribute to geopolitical turmoil in the MENA region and Europe in order to understand how this instability affects current destination security levels. Which destinations stand to gain and which to lose from tourism flow shifts created by this instability?

3. What sort of preventive measures by airlines, airports, and other transportation services against attacks have been taken and does this have any impact on destination choice?

4. How can scenario planning and strategic foresight play a role in enabling better strategic responses to the challenges that Dutch outbound tour operators face going forward?

Destination security incidents whether they be acts of terrorism, civil unrest, armed insurgencies, sectarian violence, or the outbreak of war are game changers as they can lead to tourism flow switches with far reaching consequences. The 2015 Tunisian mass shooting by a gunman at Sousse is a case in point. Not only did this attack lead to the deaths of 38 tourists it also contributed to the swift withdrawal of European tourists from Tunisia. The country in 2016 suffered a 90 percent drop in Dutch tourist arrivals and remains classified by the Dutch Ministry of Foreign Affairs as a country suitable only for essential travel. Although the actual threat level of attack in Tunisia is higher than in Spain for example, there is evidence to suggest that the perceived level of threat on the part of potential tourists is disproportionately high. Due to the media coverage that such attacks attract, the image of destinations can suffer a tourism flow loss that can take months or years to recover from, whilst during the same period the actual threat in that country may have returned to lower levels.

In order to address the issue of how Dutch customers have been reacting to increases in threat levels, both real and perceived, and to explore the role of the tour operators in their own destination choices, a survey of 504 Dutch respondents was conducted by European

Tourism Future Institute (ETFI) and NHTV Breda with four main conclusions:

- Travel safety and security are considered increasingly important by all those surveyed. Those respondents over the age of 40 are especially concerned about security matters and thus more likely to rely on and put their trust in tour operators for information.
- Younger generations were far less likely to alter their destination choice than those over the age of 40. An equal ratio of those in the 40-49 age group were just as likely to continue their holiday as they were to cancel. So in terms of changes in destination choice (as a reaction to security issues), over 40s are much more likely to do so than those under 40.
- Respondents over the age of 40 expect tour operators to be the 'guardians of their safety', who should offer where appropriate practical information concerning destination security in higher risk countries.
- The perception of trust in the safety expertise in tour operators varies depending on age group but is below optimal levels.

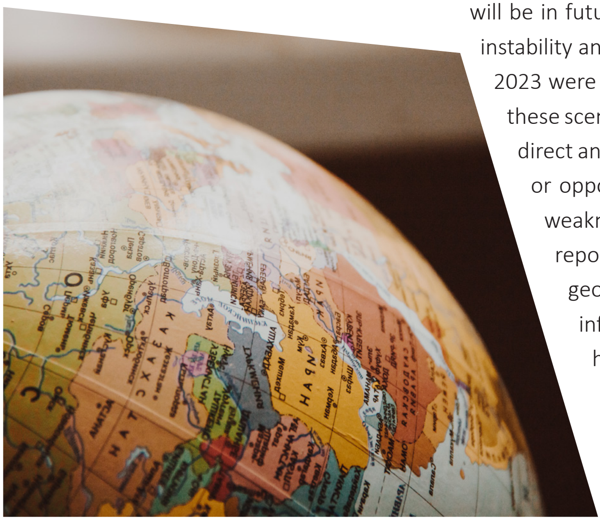
The results of research into the links between geopolitics and tourism flows reveal that countries in regions that suffer from strategic, ethnic, and sectarian divisions and who lack socially cohesive governments are likely to have higher levels of political unrest, terrorist attacks, or internal conflicts. The MENA region is an example of this and contains three traditionally popular tourist destinations for Dutch tourists (Turkey, Tunisia, and Egypt). The MENA region has been one of the most war-prone since the Second World war. From 2011 onward its instability has increased due to the lingering economic, social, and political difficulties stemming from the Arab Spring and worsening geopolitical tensions between regional powers. The combination of these forces has led to ongoing conflicts in Libya, Syria, Iraq, and Yemen, geostrategic competition between Iran and Saudi Arabia for regional dominance, and the emergence of powerful trans-national terrorist organisations such as the Islamic State. Such geopolitical risks show few signs of dissipating with instability worsening in a majority of MENA countries over the course of 2016-2017 according to the Fragile State Index and the Global Peace Index.

The combination of these factors has led to lower levels of state stability and destination security in MENA destinations and an even larger fall in their perceived levels of security. Turkey has witnessed numerous terrorist attacks over the course of 2015-2017; Tunisia has been categorised as unsuitable as a tourist destination by the Dutch Ministry of Foreign Affairs, and the destination brand of Egypt has been weakened. European destinations, including the United Kingdom and France have also suffered attacks due to radicalisation and this has heightened awareness of and sensitivity to security in general. The result has been dramatic switches in tourism flows from less secure destinations to more secure destinations. In the case of Turkey this resulted last year in a loss of roughly 10 million tourists. For the foreseeable future destination security is a pressing issue and one that will remain at the forefront of the minds of tourists for understandable reasons.

In plotting the current and future geopolitical trends, measuring destination security and identifying destinations that could win or lose tourism flows, research was done into a broad range of demographic, social, economic, and political factors. The report draws on a series of indices or classifications, including the Fragile States Index (Fund For Peace), the World Bank Worldwide Governance Indicators, and the Global Peace Index, which monitor these factors and whether they are stabilising or weakening in individual countries. From this analysis it is possible to identify those countries with good governance, robust security and preventive measures, and high levels of social cohesion and state legitimacy. These destinations are without doubt at lower risk of security disruptions as they are more inherently stable. They are not immune from attack but are more likely to recover more swiftly from disruptions once they happen.

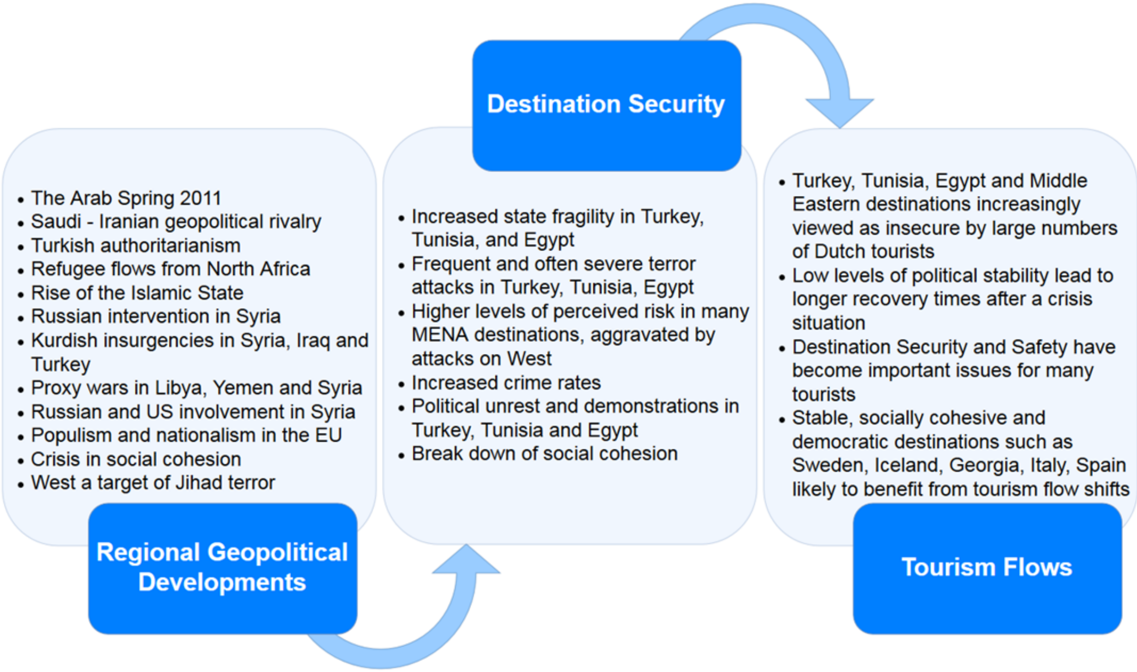
The research carried out on preventive measures reveals that the triggers for action in this area have been the recent attacks in France, Belgium, the United Kingdom, Tunisia, Egypt, and Turkey. For example, the 2016 attack on Atatürk Airport in which 41 people lost their lives caused a tightening of preventive measures both inside and outside the airport, increases of police numbers at the airport and other areas of Istanbul. Not only was airport security stepped up but Turkish museums, shopping malls and bus terminals also underwent similar changes. Additional security measures have also been taken in Paris, Brussels and London. In London barriers to safeguard against attack from road vehicles have been installed after the June 2017 London Bridge attack. However, the presence of these measures while sensible and possibly reassuring cannot yet be said to have a big influence on destination choice as the major influence is simply the level of threat of attack in the first place.

The geopolitical and destination security desk research for this report has also assisted in the production of four future scenarios for outgoing tourism flows from the Netherlands. The aim of this research was to give greater insight into strategic choices that future geopolitical instability and therefore frequency and volume of tourism flow switching will create. Dutch tour operators are advised to develop resilient strategic decision-making procedures to cope with tourism flow switching which is typical of the market now and will be in future. Based on the critical uncertainties of the future, namely geopolitical instability and environmental & health insecurity, four potential scenarios for the year 2023 were produced by the Steering Group who commissioned this research. Using these scenarios as examples of how the future might develop, participants identified direct and indirect implications of each of the scenarios, grouped them into threats or opportunities and considered actions to exploit those threats or defend the weaknesses. The comprehensive details of this process are included later in this report but the conclusions may be summarised as: invest in becoming more geopolitically aware, increase attention on security matters, consider how to inform customers about security, and most importantly for the commercial health of tour operators, embrace flexibility in all departments (contracting, marketing, customer service, product management, and public relations) as this will be the key to adapting to sudden tourism flow switches.



3. Geopolitics & Destination Safety

Figure 1: Geopolitics & Destination Safety



4. Tourism Flow Scenarios

Scenario planning was chosen as a means of focussing more practically on two vital aspects of this research. Using the conclusions of the investigations into customer reactions and links between geopolitical stability and security as input steering group members were invited to consider what the biggest uncertainties will be that confront the outgoing market for tourism in the Netherlands. The preparation for this discussion was an in detail DESTEP analysis (see appendix in ETFI full report for details of DESTEP) which provided detail on the macro environment confronting the market. The steering group selected "Geopolitical Instability" and "Environment and Health Insecurity" as the two axes of the scenario cross. That is to say, they found these aspects as the most important largest uncertainties they expect to deal with in the coming five year period. Both of these factors are likely to generate significant commercial risk for tour operators over the coming five years and beyond.

Figure 2. Scenario Planning Process

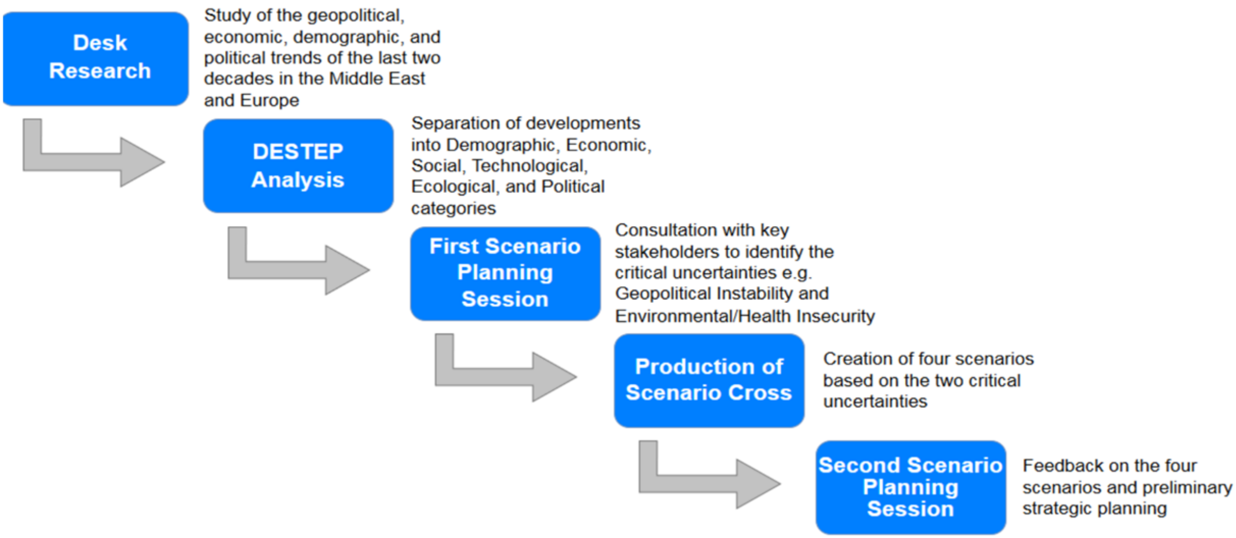
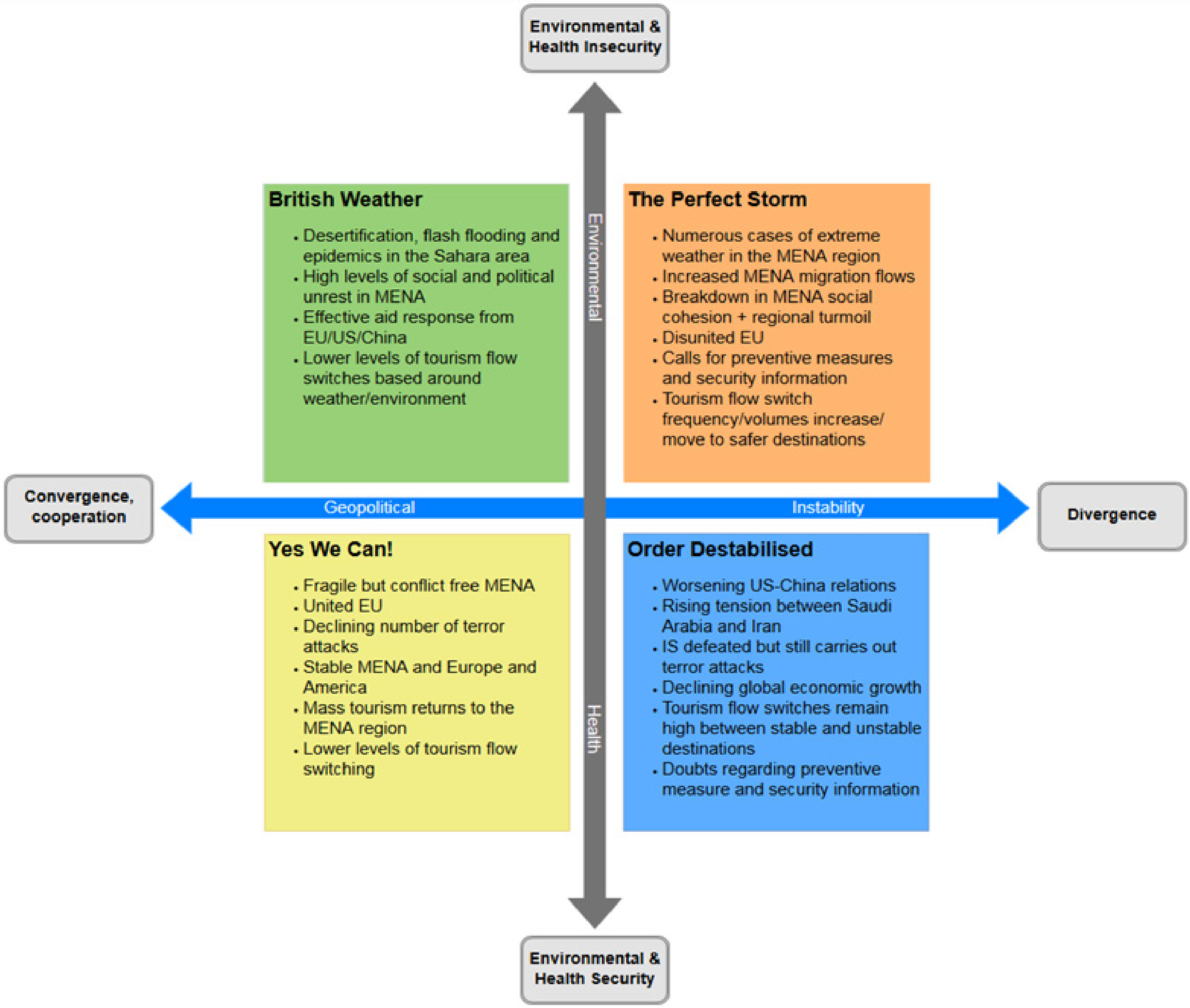


Figure 3. Scenario Cross



Scenario 1: Order Destabilized

An unpredictable US Administration is swiftly raising geopolitical uncertainty in the MENA and Asia Pacific regions during the early 2020s. US relations with China are deteriorating leading to high levels of Chinese-US brinkmanship in the South China Sea and the Korean Peninsula in 2023. US-Russian involvement in the Saudi-Iranian geopolitical rivalry and over the post-war statuses of Syria and Libya contribute to the constant threat of escalation in the Middle East. The Islamic State has lost all of its territory but together with the PKK and TAK continues to stage terror attacks in Turkey, across the Middle East, and Europe. Emerging and developed economies are gradually shifting towards renewable energy sources and there are only low to moderate effects of extreme weather and international public health concerns. Incoherent US fiscal policy, the slowing of the Chinese economy and the rise of trade protectionism in the European Union are increasingly pointing to a reduction in global economic growth. Although the actual risks of tourism remain moderate, the perceived risk of tourism to the MENA region remains high due to political and economic instability. Global tourism still enjoys moderate, albeit reduced, growth, but sudden tourism flow switches in the MENA region linger due to high levels of political risk generated by the existence of a myriad of global geopolitical flashpoints and acrimonious great power relations.

Scenario 2: Yes We Can!

The reduction of great power assertiveness and robust multi-lateral cooperation over Syria, Yemen, Iraq, and Libya lead to a series of ceasefires and a conflict-free, albeit fragile, Middle East in 2023. Refugee agreements with Turkey and Libya, strong Franco-German relations and slow-moving but effective European security integration reduce the EU's external vulnerabilities and bolster the bloc's strategic autonomy. Germany becomes the main driver of economic growth and political integration in the EU but a multi-speed EU materialises as the Visegrád Four refuse to transfer sovereignty to Brussels. Terrorist attacks still occur in Europe and the MENA region infrequently but international intelligence sharing efforts considerably reduce their efficacy. The lack of major epidemic outbreaks, the global transition towards renewable energy, and the meeting of the COP 21 targets ensures that global environmental and health security remains positive. Strengthened Chinese-US bi-lateral ties and a reset of Russian-US relations lower great power tensions in East Asia and the Middle East respectively. A stable geopolitical environment in the Middle East, leads to the improvement of destination security and a decrease in the perceived risk of travel to the majority of Middle Eastern destinations. Mass-tourism returns to Turkey, Tunisia, Egypt and new destinations in the Black Sea region emerge to accommodate for upsurge in tourist arrivals in the short-haul area. Regional tourism flow switching in the Middle East and Southern Europe remain low as a result of high levels of destination security.

Scenario 3: British Weather

Desertification, flash flooding, crop failures and water scarcity and the emergence of epidemics in the Sahel region during the early 2020s continue to harm state stability, and strengthen migration flows via North Africa to the EU. Environmental and health risks spread into the Middle East and North Africa, contributing to demonstrations, social unrest, and political instability and lead to higher than normal regional travel risks. These threats harm the economies and tourism sectors of numerous MENA states but a benign international environment ensures that they are contained and gradually resolved by the influx of development aid and international assistance via the EU/US/China and UN Agencies by 2023. The actual and perceived risks for tourists to the MENA area remain high in the immediate aftermath of the environmental disasters but are quickly declining. Environmental, health and political risks ensure that tourism flow switches in the MENA area and Europe are flattening but are still at relatively high levels due to the high potential of a fresh environmental or health crisis.

Scenario 4: The Perfect Storm

In 2023 the worsening effects of climate change are contributing to MENA countries increasingly suffering from extreme weather effects, food shortages, epidemics, and high levels social unrest. The unstable political situation substantially increases migration flows to the EU, leading to a breakdown in social cohesion and sparks intra-state conflicts over remaining water resources in the Middle East and North Africa. A fragile EU is unable to effectively cope with the problem effectively or attract assistance from the US, Russia, or China due to the three great powers continued embroilment in geostrategic competition in the Middle East, East Asia, and Eastern Europe. The high levels of geopolitical uncertainty are increasing perceived and actual travel risks rapidly and reducing global tourism flows. In response to the especially high travel risks in the MENA region extreme levels of tourism flow shifts away from the crisis-blighted countries to safer destinations in Northern Europe are becoming ever more noticeable.

5. Results Scenario Planning Sessions 1 & 2

In the second scenario planning the steering group considered the four scenarios and were asked to identify the most important changes that will be caused by each of the four scenarios (see figure 3), so the question here was: what does this scenario actually mean for the business? Along with the changes caused also come business implications. The next step was then to group these changes and implications into whether they are desirable changes/implications or undesirable, or in other words whether they are opportunities or threats (see figure 4). Those factors were then ranked in order of importance and from these two groupings strategic actions were identified (see figure 5):

The listing and ranking of threats and opportunities based on plausible and realistic visions of the future revealed some interesting and thought provoking results. The results also beg the question: what tactical or strategic actions are necessary in order to minimise threats and maximise opportunities? The grouping of threats and opportunities can be seen on the following page.

Table 4. Threats & Opportunities

Threats	Opportunities
A. Competition on safety (4)	1. Global partnerships (5)
B. Limited mobility (5)	2. Different holiday periods (5)
C. Higher distribution costs (2)	3. Development of accommodation and infrastructure on existing 'good' destinations (5)
D. Migrant flows (5)	4. Development of new destinations (5)
E. But shit keeps happening (4)	5. Expectation management by tour operators; media offensive (5)
F. Culminating xxx (2)	6. Continual rise of number of destinations (4)
G. Less paxes, less turnover (2)	7. High flexibility tour operators (4)
H. BLN/... Venice and Amsterdam scenario (2)	8. Information role of the government; data destinations (3)
I. We get used to unsafety (business as usual) (1)	9. Tour operators will do more to protect/inform paxs's > pax will expect more
J. Border controls within EU (1)	10. New business models (3)
K. Prices of insurances increase (1)	11. Cooperation on safety issues (3)
L. Disappearance of Euro > what does it mean for NL? (1)	12. Customer wants security (2)
M. Economic recession (1)	13. New modes of cooperation (2)
N. Countertrend against help/aid (1)	14. Humanitarian tourism (2)
O. Less turnover (1)	15. New business models (2)
P. Closed borders (2)	16. Flexibility is most important (2)
Q. Increased pressure on destinations (2)	17. Economic growth (2)
R. Less turnover (1)	18. More Euros; margins? (2)
S. Less purchasing power (1)	19. Different yield management (1)
T. Less destinations (1)	20. Privacy? (1)
U. Less spendable/elasticity (1)	21. Different' instead of 'less' (1)
V. More conflicts with airport slots, available accommodation, etc.	22. Shift of destinations
W. Decrease of supply (1)	23. More resorts, hide people from misery (1)
X. Rise of insurance costs (1)	24. Customers do not want to be confronted with refugees (1)
	25. More camping holidays (1)
	26. Less pre-paid accommodation in 'unsafe areas' (1)
	27. Development of new/alternative destinations (1)
	28. Privacy laws (1)
	29. Safety as USP (1)

Figure 5. Tactical & Strategic Actions

	Combining	
Actions	**Opportunities**	**Threats**
Lobby towards government to stop with staggering of holidays	Different holiday periods (2)	Increased pressure on destinations (Q)
More and better information about destinations	Customer wants security (12)	We get used to unsafety – business as usual (I)
Customers have to provide more personal data, this gives more insights in who is travelling, and borders can stay open/ flexible	Privacy (20) Flexibility is most important (16) Privacy laws (28) Customer wants security (12)	Closed borders (P)
Invest in IT and e-commerce	New business models (10)	Higher distribution costs (C)
European travel advice	Cooperation on safety issues (11)	X
Renegotiate accommodation in unstable areas; prepayments/guarantees go down	High flexibility tour operators (7) Less pre-paid accommodation in 'unsafe areas' (26)	Shit keeps happening (E)
Increase attention to security, in cooperation. Ultra safe resorts.	Tour operators will do more to protect/ inform paxs's > pax will expect more (9) More resorts, hide people from misery (23) Global partnerships (1)	Competition on safety (A)
Security consciousness/risk analysis and travelling safer	New business models (10)	Flexibility is most important (16)

Combining		
Actions	**Opportunities**	**Threats**
Media campaign: security risk in perspective; different holidays staggering preferred; more flexibility needed (slots etc.)	Expectation management by tour operators; media offensive (5) Customer wants security (12) Different holiday periods (2) High flexibility tour operators (7) Tour operators will do more to protect/ inform paxs's > pax will expect more (9)	More conflicts with airport slots, available accommodation, etc (V)
Scouting session and research	Development of new destinations (4)	Less destinations (T)

It is clear that from the listings the overall picture is that tourism will continue to increase but that the geopolitical situation will give rise to dramatic tourism flow switching based on destination security. This gives rise to opportunities and threats for tour operators. In the main the areas for attention are the changing buying decisions of the customer (based on security) and how the tour operators can adapt to sudden tourism flow shifts. Therefore flexibility (on the part of tour operators) is mentioned and the way customers are dealt with and informed (related to security) is mentioned. Beyond that the perceptions around security or lack of it give rise to opportunities in terms of new resorts or focussing on protected or ultra-safe resorts.

6. Conclusions & Recommendations

Moving to conclusions this report asserts the following:

- That threat levels in relation to security in destinations have increased and will continue to be high. Both the actual threat and the perceived levels of threat have increased due to geopolitical instability and domestic turmoil in the MENA region, but not confined to it. The perceived levels of threat are disproportionately high compared to actual threat. This reality gap comes about through lack of understanding of geopolitical reality but also due to the sensationalised presentation of security issues in the media. The issue is further highlighted by recent attacks in Europe.

- There is a clear proven link between geopolitical instability and compromised security levels. Many examples have been detailed in this report and the classifications quoted prove the link.

- The criteria in the classifications link political, social, and economic factors as criteria which impact on geopolitical stability or lack of it and in turn reflect on security. Those countries with high levels of social cohesion, good governance, state legitimacy, and democracy score well in terms of being stable and are more secure destinations.

- All the above has given rise to the phenomena of tourism flow switching from destinations perceived as insecure to those perceived as more secure which has massive disruptive power and causes shifts of millions of tourists with serious business implications for tour operators.

Moving to recommendations and actions for the industry to consider:

- Instigate efforts to monitor geopolitical trends in the regions and countries considered unstable and offered as tourist destinations. This will help to monitor which countries are likely to become increasingly less secure over time. This could be done by employing geopolitical monitoring services from external bodies such as SOS International, and EXOP, but it could also be achieved more cost effectively by teams of interns under the supervision of the tour operators' internal crisis Manager or security specialists. Greater discussion over destination security levels with DMOs would also be of benefit. This information can be communicated to customer support teams who deal with customer enquiries. Having this information will ensure that tour operators are well informed of current and upcoming geopolitical risks and able to use this knowledge in customer contact.

- Embrace strategic foresight procedures (scenario planning) to develop more resilience and flexibility in all areas of the business. Based on the information gained through monitoring the current regional geopolitical situation and individual country situations, tour operators could develop scenarios on a yearly basis to ensure they are better able to anticipate, prepare for and cope with commercial risks caused by tourism flow switching. By involving employees in all departments of their business, action lists based on better flexibility can be drawn up and implemented. Brand image as a safer travel option (than DIY online) can be created and better bottom line performance can result.

- Improve strategic agility/flexibility in developing contingency plans based on risk of a switch of tourism flow from one destination to other. This will enable tour operators to transfer customers from one country or destination to another in the event of threats or breaches to incidents that compromise destination security. This could involve selecting a primary replacement for stricken destinations (e.g. Greece for Turkey) which has sufficient capacity to take a significant portion of clients and 2-3 secondary destinations to provide a plurality of choice for customers.

- Consider a media offensive to close the gap between perception of threat to some destinations and actuality of threat. The aim would be to bring some reality and perspective into the subject of destination security. At the same time tour operators are seen by their customers as responsible for information about potential dangers. Encourage tourists to use the new BUZA App (Dutch Ministry of Foreign Affairs Travel Risk App). This gives useful up-to-date information to tourists on risks they may face direct on their smartphones. Share access (with customers) to database classifications (like EXOP) which offer information on early-warning signs of danger in destinations.

- Provide where necessary access to accurate and clear information on destination security to tourists through appropriate channels. This is likely to reassure tourists and ensure they themselves are able to come to a more accurate and rational decision on the actual risks they are taking. Marketing and communications can also be used to more accurately reflect the actual threat levels on the ground which may be more secure than portrayed in the news media. Failure to provide better access to this information runs the risk of tour operators being viewed (by media channels and the public) as placing commercial interest above customer safety. Moreover, the provision of this information where appropriate would enhance the brand image of tour operators in general and provide them with competitive advantage compared to booking via online.

- Instigate a process of re-evaluation of agreements concerning accommodation with destinations stakeholders that are less geopolitically stable (more prone to tourism flow shifts/losses). The aim here is to examine areas of the business in order to improve flexibility and resilience to tourism flow switching.

- Consider strengthening agreements with and focussing marketing resources on destinations who are geopolitically stable and are likely to benefit from tourism flow switches.

Colofon

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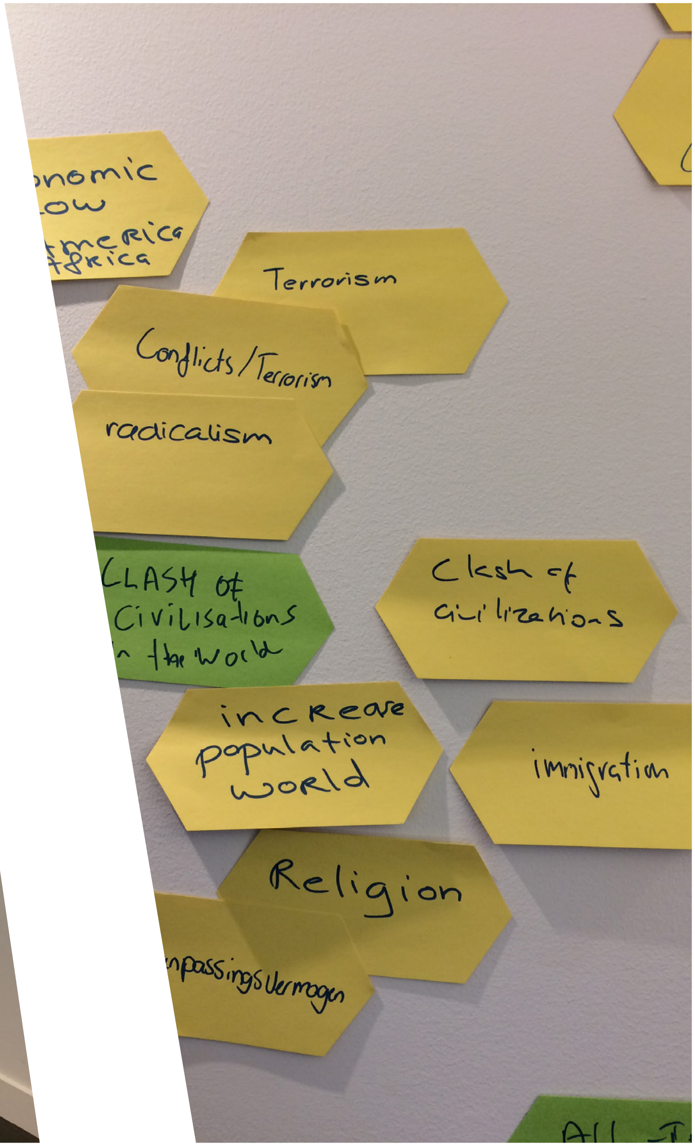
Terrorism
Conflicts / Terrorism
radicalism
Clash of civilizations
increase population world
immigration
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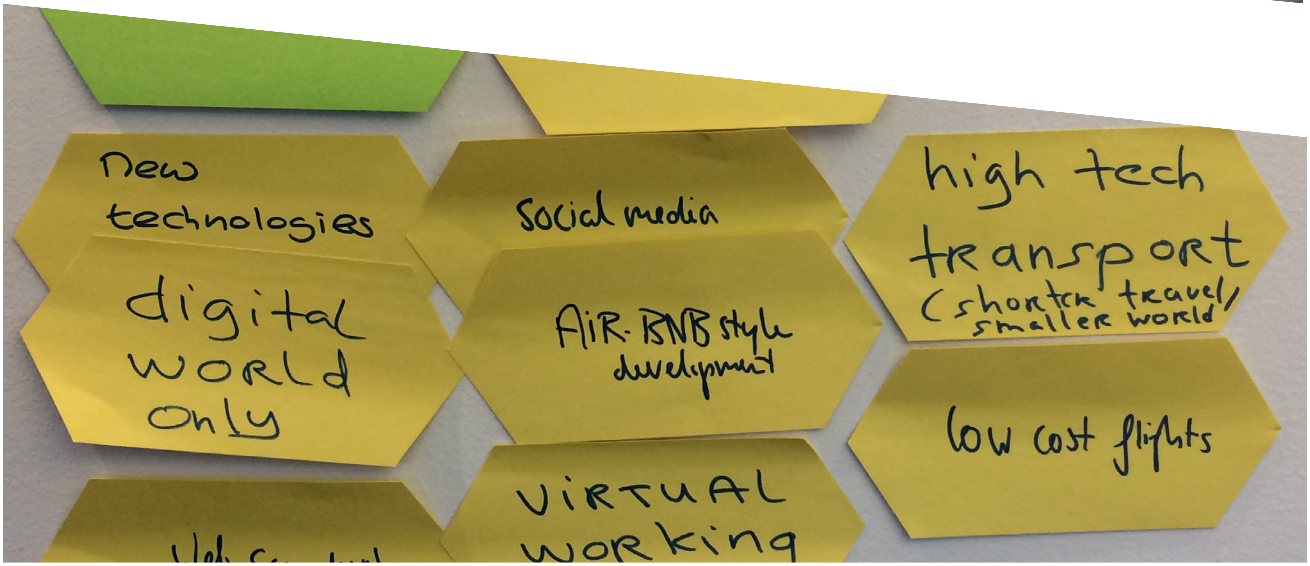
new technologies
Social media
high tech transport (shorter travel/ smaller world)
digital world only
AIR-BNB style development
low cost flights
virtual working

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