Tourist behaviour in a COVID-19 world: a New Zealand perspective

Ian Seymour Yeoman, Heike A. Schänzel and Elisa Zentveld

Abstract

Purpose – *The COVID-19 pandemic is considered a "once in a century" public health shock that, at the time of writing, continues to have a profound impact on global tourism and New Zealand. The paper aims to assess how consumer behaviour trends changed using a trends analysis framework.*

Design/methodology/approach – *Positioning the paper in the prognosis–prediction paradigm from futures studies and using a trend analysis approach, the authors forecasted a series of tourist trends at the beginning of COVID-19 based upon a multitude of sources trends. Then, 12 months later, they reported on the accuracy of these forecasts.*

Findings – *The matrix identifies 15 trends based upon consumer behaviour changes, which are either dominant, slowed, advanced or arrested. The prognosis was largely correct, which was supported by evidence gathered 12 months later.*

Research limitations/implications – *The paper uses a series of different data sources to reflect on the initial forecasts. To some, this may be an issue of rigor, but the authors argue that through triangulation, credibility and validity are increased.*

Originality/value – *First, the evaluation matrix allows users to make sense of COVID-19 based upon the concepts of dominant, slowed, advanced or arrested trends. Second, the matrix allows users to evaluate changes and movement of trends. Third, the trends featured in this paper could be generalisable to several different circumstances associated with simple identity. Fourth, this paper has tested the ability to predict trends in an uncertain environment within the context of the ontological paradigm of prognosis and prediction of futures states.*

Keywords *New Zealand, Tourism, COVID-19, Consumer behaviour, Futures, Trends*

Paper type *Research paper*

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Introduction

The COVID-19 pandemic is considered a "once in a century" pandemic. It has had a profound impact on economic and financial systems around the world, as well as negatively impacted many people's well-being. There has not been a country in the world that escaped the consequences and disruption of COVID-19. Some commentators considered New Zealand to be relatively fortunate compared to many other countries as its isolation, and early planning resulted in the country escaping some of the more devastating impacts of deaths and hospitalisations that many other countries witnessed. Closing its international borders devastated New Zealand's largest export earner, tourism; however, a strong domestic market remained.

This paper sets out to explain a series of trend forecasts made by the authors in May 2020 as a consequence of COVID-19 in New Zealand. Second, one year later, the authors reflect upon these forecasts against what happened. Third, the trends evaluation process and findings, which are specific to New Zealand, are proposed as an understanding of tourist behaviour in similar developed economies based upon the concept of simple identity. These findings could then be generalised to other developed economies as a further contribution to knowledge and practice.

Received 28 March 2021
Revised 17 December 2021
1 April 2022
Accepted 3 April 2022

COVID-19 and New Zealand

When the first cases of COVID-19 in Wuhan, China, were reported by the World Health Organisation (WHO), they indicated that the outbreak was almost certain to become a serious pandemic (Baker *et al.*, 2020). Despite New Zealand's geographic isolation, the New Zealand health authority realised that the arrival of COVID-19 was imminent because of the large number of international tourists arriving from the USA, Europe and China in early 2020 during the summer season. Thus, early on, it was identified that tourism would bear the brunt of any government response to COVID-19.

The first reported case of COVID-19 in New Zealand was on 28 February 2020. That same week, the WHO–China Joint Mission's report highlighted that COVID-19 was behaving more like severe acute respiratory syndrome (SARS) than influenza, which suggested that containment was possible (Gomes, 2020; Ruan, 2020). However, this hope was short lived. By mid-March, it was clear that community transmission was occurring in New Zealand, and that the country did not have sufficient testing and contact-tracing capacity to contain the virus. Informed by a strong science-based advocacy, national leaders decisively switched from a mitigation strategy to an elimination strategy.

Throughout March 2020, the number of cases continued to rise significantly, reaching a total of 647 cases by 31 March 2020. On 29 March, New Zealand reported its first coronavirus-related death, a woman in her 70s from Greymouth. As a response, the government closed all borders and entry ports of New Zealand to non-residents on 26 March 2020, with returning citizens and residents being required to self-isolate. From 10 April 2020, all people arriving by air had to go into 14 days of managed isolation in adapted commercial hotels (Jefferies *et al.*, 2020, p. 10). A four-tier alert-level system was introduced on 21 March 2020 to manage the outbreak within New Zealand. Since then, after a two-month nationwide lockdown, from 26 March to 27 May 2020, regionalised alert-level changes have been used, where the Auckland Region entered lockdown twice (Dyer, 2021). In August 2021, New Zealand entered nationwide lockdown due to a case of community transmission in Auckland of the Delta variant, with subsequent community cases in Auckland and Wellington. Auckland remained in a form of lockdown until 15 December 2021, and regional borders were established, preventing Aucklanders from leaving the city (Ministry of Health, 2021). Overall, New Zealand was perceived as setting the gold standard in following an elimination strategy and recording the lowest deaths amongst Organisation for Economic Co-operation and Development (OECD) countries, with Prime Minister Jacinda Ardern receiving much credit (Mazey and Richardson, 2020).

Forecasted economic impact

In March 2020, New Zealand, like the rest of the world, was entering into a period of uncertainty that was unprecedented. New Zealand had never seen anything like this before (Carr, 2020; Cox, 2020; Jamieson, 2020). As the potential consequences of COVID-19 started to unfold, a report was published by *Te Tai Ohanga: The Treasury* on the 20th of April 2020 (Gardiner, 2020). The report titled, *Treasury Report T2020/973: Economic Scenarios* envisaged five scenarios in which COVID-19 would be disruptive on the New Zealand economy for 12 months. The scenarios meant a drop in economic output of between 12 and 40% depending on different degrees of disruption and the length of the disruption with recovery to 2020 economic levels not forecasted until 2025 in the worst-case scenario. Whatever the scenario, it is tourism that would see the greatest degree of economic disruption as borders closed to international arrivals. In 2020, COVID-19's impact on New Zealand tourism was significant, with New Zealand's national carrier Air New Zealand grounded, international arrivals came to a halt.

Tourism and potential recession

Queenstown, the epicentre of New Zealand international tourism, became a ghost town in contrast to its usual state of operating. A country where in 2019 tourism made an economic contribution of NZ41.9bn, with international expenditure representing NZ$17.5bn or 20.1% of New Zealand's exports of goods and services, was the country's largest export earner. As a consequence of COVID-19, the export tourism industries ceased on 19th March 2020, when the borders closed, and the country went into lockdown. Due to New Zealand's geographical position, science-based advocacy and national leaders focus on an elimination strategy, the country had relatively few deaths from COVID-19 (Baker *et al.*, 2020) and has operated at lower-tier levels, meaning the country's domestic tourism economy stayed buoyant.

Given the changing circumstance and level of uncertainty, tourist behaviours and spending habits changed too. Of the dozens of trends that shape tourism in New Zealand, the authors in May 2020 identified a series of trends that they forecast would become dominant in a COVID-19 environment. This analysis was based upon an understanding of how economic conditions shape tourists' behaviour and activity.

Although the authors acknowledge there are a number of different theoretical approaches to study tourist behaviour and the impact of COVID-19, including trust and fear (Hassan and Soliman, 2021), behavioural reasoning theory (Bhati *et al.*, 2021), geography (Sánchez-Pérez *et al.*, 2021), travel intention (Das and Tiwari, 2021), self-congruity theory (Cifci, 2022), emotional experiences (Qi and Li, 2021) and destination loyalty (Woosnam *et al.*, 2021). However, it is economics and wealth that is one of the primary drivers of tourist behaviour (McKercher *et al.*, 2022; Pearce, 2005, 2011; Shaw *et al.*, 2000).

Where wealth is a primary driver, a notable link can be made to concepts of identity on a continuum from fluid to simple identity (Adams, 2014; Hibbert, 2013; Yeoman, 2010). Fluid identity is based upon rising incomes, consumer confidence and wealth accumulation in which tourists create new opportunities for connection and association. Wealth allows the pursuit of personal identity in which the focus is on experiences and novelty. This was about the tourist sampling new locations, experiences and going beyond the norm. The main beneficiaries would be the tourism and events industries as they were right at the heart of the experience economy (Boztug *et al.*, 2015; Yeoman and McMahon-Beatte, 2019). The opposite of fluid identity is a simple identity that emerged after the global financial crisis in propelling tourist trends into a slowdown, halting or even reversing the trajectory of growth in world tourism (Flatters and Willmott, 2009). Simple identity (Yeoman, 2010, p. 124) means:

> During an economic slowdown, tourists tend to travel less, stay near home (increase in domestic tourism) and seek simplicity such as www.exploreworldwide.com value-based holidays focusing on basic facilities, meeting locals, lots of free time and bargains. This trend is accelerated in the scenario of falling incomes as a simple and functional product that will suffice (p. 124).

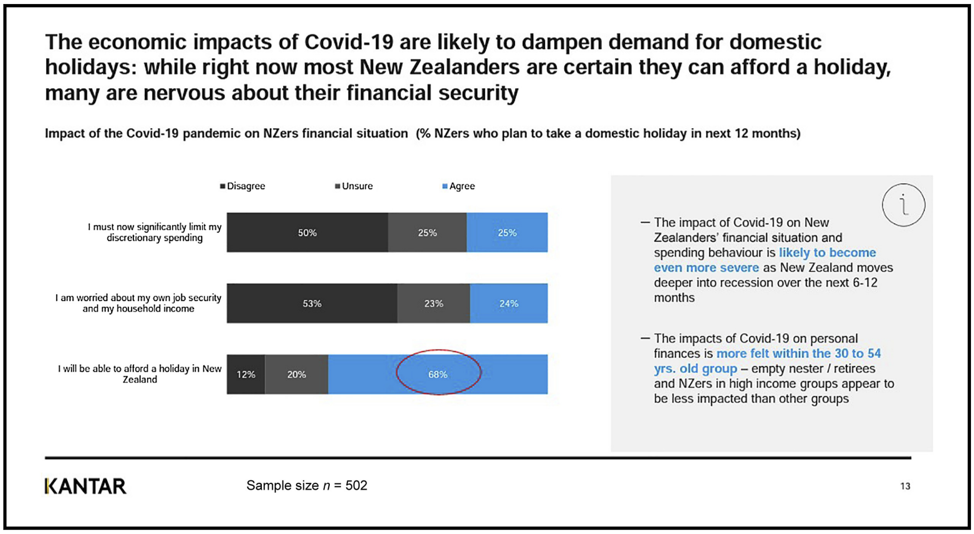
The concept of simple identity was at the heart of consumer sentiment in May 2020. For example, the uncertainty associated with wealth was the number one factor in New Zealand consumers' minds during COVID-19. According to the New Zealand Lifestyles survey (Watkins *et al.*, 2021, p. 10):

> The financial uncertainty created by COVID is evident with 61% of respondents more worried about the economy than they were a year ago. Only 38% agreed they felt secure about their personal income and only 25% agreed that their family was better off financially than it was a year ago (p. 10).

Research commissioned by Tourism New Zealand (TNZ) (Kantar, 2020) at the beginning of COVID-19 in 2020, confirmed that a significant proportion of New Zealanders was worried by job prospects and levels of discretionary income, indicating a shift to saving, mercurial consumption and behaviours associated with this paper (Figure 1).

Recessions fall into two categories. Most are brief and shallow and provoke a short-term change in international arrivals and a downturn in tourism experiences – i.e. bungee jumping and restaurant spending. However, deep recessions are different. The Great Depression of the 1920s (Sheel, 2008) and Japan's lost decade of deflation (Comerio and Pacicco, 2021) changed the mindset of tourists and had a long-term impact on consumer behaviour (Hampson and McGoldrick, 2013; Senbeto and Hon, 2020).

Figure 1 Economic impact of COVID-19 on tourism spending habits



Methodology

Using an evaluation matrix (Figure 2) developed by Flatters and Willmott (2009), the authors set out in May 2020 to show what the consumer behaviour trends were expected to be: the slowed trends, the trends that will be arrested, the dominant trends and the ones that will advance. The matrix allows destination planners and tourism businesses to evaluate what trends to focus on in a COVID-19 scenario. The authors then outlined the implications of these trends from a New Zealand tourism perspective.

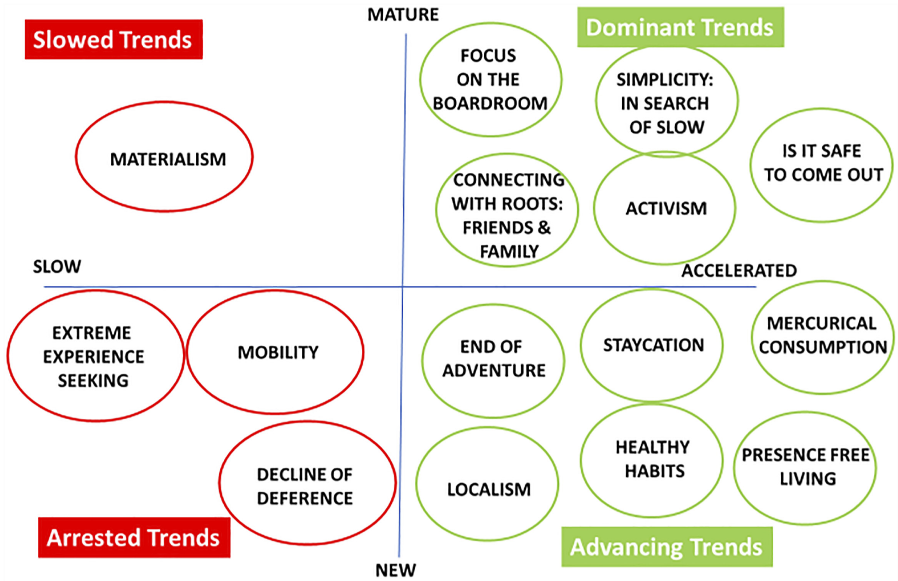
This aligns with futures theory within an ontological paradigm using prognosis and prediction of futures states (Bergman *et al.*, 2010). Prognosis follows a pathway of believed truth in which the authors made an estimate of what the future could be based upon their expertise. Prognosis means foreseeing, predicting or estimating the probability or risk of futures conditions fundamentally drawn from expertise. In medicine, a prognosis commonly relates to the probability or risk of an individual developing a particular state of health. Typically, a prognosis is an expert opinion of a general practitioner (GP) based upon symptoms presented (Moons *et al.*, 2009). This is what the authors did as well. The trends identified by the authors were based upon literature, industry reports, observations and conversations with industry stakeholders. Then 12 months later, the authors reflected upon their prognosis and examined what happened. Here, we moved from prognosis to prediction. Prediction is about truthfulness based upon facts rather than belief (Bergman *et al.*, 2010). In medicine, this is about a GP making an initial prognosis then commissioning a series of tests to confirm or disconfirm that prognosis. The tests are a source of truthfulness based upon evidence (Blau, 1998; Harrell *et al.*, 1996).

Selection of tourist behaviour trends and trends matrix

Fifteen trends were identified, which were consumer behaviour orientated. These trends are classified as dominant, slowed, advanced or arrested, clustered in Figure 2. The trends that are *dominant* are: focus on the boardroom; simplicity in the search of slow; connecting with roots: friends and family; activism and is it safe to come out. The *slowed* trend is materialism. Trends that are *advancing* include end of adventure; staycation; mercurial consumption; localism; healthy habits and presence-free living. *Arrested* trends include extreme experience seeking; mobility and decline of deference.

Each trend is then supported by evidence gathered 12 months later. This evidence came from a range of sources, as one source could only provide an incomplete picture, but when combined,

Figure 2 Trends matrix



Source(s): Adapted from Flatters and Wilmot (2009)

painted a more complete picture of what happened. The strength of this approach meant that for each trend identified, there was not a reliance on a singular data source. Data sources used were a combination of official government statistics, consumer panel surveys, media reports, expert interviews and academic publication. For example, the trend *simplicity: in search of slow* drew upon TNZ's Domestic Travel Survey undertaken by Kantar (2021). This was further supported by accommodation data provided by the Department of Conservation (2021) from the *Visitor Insights Report.* For example, the trend *is it safe to come out* drew on a range of academic studies about how the New Zealand media portrayed issues of safety (Matiza, 2022; Thirumaran *et al.*, 2021) and a survey of New Zealanders perception of safety (Doogan *et al.*, 2020). Further evidence was sourced from TNZ's Domestic Travel Survey undertaken by Kantar (2021) who identified safety as the number one barrier for not taking a holiday. For the trend *extreme experience seeking,* hard physical evidence about the purchase of adventure sports activities in Queenstown was difficult to access because of issues of commercial sensitivity, but the matter was well reported in the media (Jamieson, 2021). In addition, expert opinions were sought from destination leaders who had a finger on the pulse and knew what was going on (Ives, 2021). By adopting this triangulation approach, data associated with each trend became more reliable and valid (Easterby-Smith *et al.*, 2008; Noble and Heale, 2019).

Dominant trends

Connecting with roots: visiting friends and relatives. The family is the most important feature in consumers' lives. Its emotional attachment is at its highest in times of personal bereavement or economic recession (Schänzel and Yeoman, 2014, 2015; Yeoman, 2008). From primordial societies to the modern-day, family members are those who people depend on. As the nuclear family evolves, networks of emotional closeness are reconstituted. Even in a global society where families and friends are spread around the world, there has never been a greater connection with them through social networks. Family are those who people want to be with when times are hard. Hence, one of the most important sectors will be visiting friends and families.

What happened:

According to research by Kantar (2021) on behalf of TNZ, in July 2021, visiting friends and relatives was the second most popular reason for holidaying in New Zealand (Figure 3). The pressure on managed isolation facilities needed for travelling to New Zealand can also be attributed mainly with families split by border closures who are desperate to reunite with their partners, parents and (grand)children (Hunt and O'Dwyer, 2021).

Simplicity: in search of slow. During an economic slowdown, tourists tend to travel less, stay near home and seek simplicity such as value-based holidays focusing on basic facilities, meeting locals, lots of free time and bargains. Here, tourism is about the beach or the view from the mountain. It is about being less plugged in and less always-on-the-go lifestyles (Quorin *et al.*, 2020; Wen *et al.*, 2021).

What happened:

According to research by Kantar (2021) on behalf of TNZ, in July 2021, opportunities to relax and see spectacular natural landscapes (Figure 4) were the most popular reasons for holidays in New Zealand.

This was supported by statistics provided by the Department of Conservation Great Walks. The Great Walks are ten self-guided walks through some of the best scenery in New Zealand, with each walk taking between three and six days. According to the latest statistics from the Department of Consevation (2021):

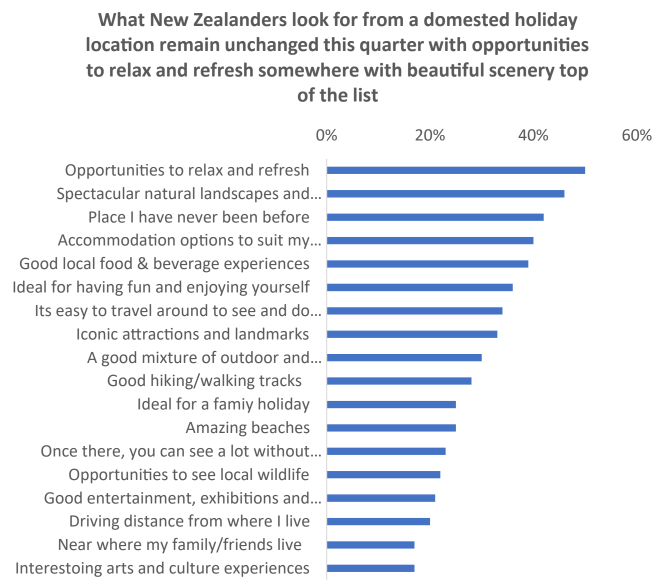
> There was strong demand for Great Walks with around 91,800 people who stayed overnight at Great Walk huts and campsites across the year (booking period starts 1 July 2020 and ends 30 June 2021). Many New Zealanders took the opportunity to experience the Great Walks. Domestic visitor numbers were the highest they have ever been across the network.

Focus on the boardroom. During a recession, corporate excessiveness and governance come under the spotlight. Misbehaviour that boards might get away with in good times arouses the ire of consumers and regulators. The focus on corporate social responsibility has never been higher. This trend is about how a tourism business behaves (Quorin *et al.*, 2020).

Figure 3 Domestic travel view report

Source(s): Tourism New Zealand/Kantar

Figure 4 Domestic travel view report



Source(s): Tourism New Zealand/Kantar

What happened:

Tourism industries were deeply affected by COVID-19 due to lockdown restrictions (Hall *et al.*, 2021b). Consequently, the government responded by introducing a wage subsidy to avoid a massive increase in unemployment (Ministry of Health, 2021; Pigou, 1933). The initial wage subsidy covered the period of 17 March to 9 June for 12 weeks when businesses could not operate because of Level 4 restrictions. The payment covered 12 weeks. To qualify, businesses must have experienced a minimum 30% decline in actual or predicted revenue over a month, when compared with the same month the previous year, and that the decline was related to COVID-19. The subsidy was paid at NZ$585.80 for people working 20 h or more per week (full-time rate) or NZ$350.00 for people working less than 20 h per week (part-time rate). Further schemes were extended throughout 2020 costing NZ$2.8bn as of 23 October 2020 according to the Auditor General of New Zealand (2021). Those who took up the wage subsidy included 93% of food service and accommodation providers, which was the second-largest industry to be supported by the scheme after construction and 30% of businesses that received income from tourism (Ministry of Social Development, 2020).

This policy is based upon a high trust approach to get support from employers quickly. A high trust model was not without risks, given the level of payments to many big businesses, including the issue of fraud. Consequently, companies that received monies from wage subsidies were made public and included the total monies received on the scheme, given the public outcry for accountability (Cox, 2020; Hemmington and Neill, 2021). This included several media stories of high-profile tourism operators such as Air New Zealand and Sky City and the amount of money they had received (Marshall, 2021), and other stories shaming companies focusing on repayment and greed (Foxcroft, 2021).

Activism. Whether it has been the #MeTOO movement (Ram, 2021) or climate change protest (Guia, 2021), there has been a significant shift in tourism in which communities are active in seeking a better world through vigorous campaigning to bring about political or social change, which has been accelerated by COVID-19 (Quorin *et al.*, 2020). Consumers are connecting with peers virtually across the world as communities unite, to share, advise and campaign. Community pages and forums have quickly appeared on platforms including Facebook, WhatsApp and Nextdoor to connect people with local volunteers and mutual aid groups (Quorin *et al.*, 2020).

What happened:

From a tourism perspective, the focus was on communities, regenerative tourism (Cave and Dredge, 2020) and better tourism perspectives. COVID-19 and other pandemics have made many people consider what tourism should look like in a post-recovery world. This is natural, as from dystopia emerges utopia, and from crises, people seek hope (Dator, 2019; Hedrén and Linnér, 2009). In New Zealand, this utopia emerged into activism within many communities and regional destinations. The issues raised included media stories about the need for a living wage in the hospitality sector (Williamson and Harris, 2021), community activism and festivals (Papoutsaki and Stanfield, 2020), tourism as a social force (Higgins-Desbiolles *et al.*, 2021), the importance of indigenous and Maori tourism (Carr, 2020; Scheyvens *et al.*, 2021), the opportunity to rethink tourism (Khalil, 2021), climate change and sustainable tourism (Upton, 2021) and the new word in 2021 "regenerative tourism" (Becken and Kaur, 2022). Because of this hope and the desire for a new beginning, the New Zealand government set up the Tourism Futures Taskforce [1] to rethink tourism. Sustainability and regeneration became the norm for regional destination plans [2].

Is it safe to come out. Safety has become of paramount importance to tourists in COVID-19 scenarios (Singh, 2021) based upon an unprecedented level of public fear, which Zheng *et al.* (2021) call "travel fear". Fear is a primitive emotional response to a threat, i.e. COVID-19; it is incalculable and unpredictable. As some tourists are unwilling to venture out because of the circulation of the virus in the community, this has meant tourism businesses have had to focus on health and hygiene procedures to reassure tourists.

What happened:

Given the infection rates of COVID-19, tourism operators had to follow health and safety regulations that were associated with different COVID-19 alert levels [3]. These included social distancing, sanitation, venue capacities, bubbles and QR tracer scanning. Media stories about COVID-19 infection rates and safety were a central feature of daily life in 2020 (Matiza, 2022; Thirumaran *et al.*, 2021); hence, a heightened awareness of safety was evident with New Zealand citizens. A survey of global consumers perception of safety during COVID-19 found that New Zealanders paid the greatest attention to safety indicators with US citizens the least (Doogan *et al.*, 2020). In addition, according to research commissioned by TNZ (Kantar, 2021), safety was the number one factor of New Zealanders' perceptions of holidaying in New Zealand.

Advancing trends

Staycations. Unsurprisingly, in a recession, tourists focus on domestic rather than international holidays (Hall *et al.*, 2021a). These domestic holidays are sometimes referred to as a "staycation" (Cvelbar and Ogorevc, 2020). Staying in a local region and holidaying in one's own region can also be referred to as a "staycation". During COVID-19, destinations across the world used the term "staycation" in advertising as consumers could not travel due to travel restrictions (Ketter and Avraham, 2021). At the time of writing, the domestic market [4] is shaped by the short break, families, visiting friends and relatives or the serious leisure user (someone who takes their hobby on holiday – i.e. recreational fishing, photography or tramping).

What happened:

Tourism electronic card transactions represent domestic tourism spending [5] in New Zealand. In 2019, this figure was NZ$9.5bn, which by September 2021 (year on year) had risen to NZ$10.9bn as New Zealanders holidayed at home. According to research by Kantar (2021) commissioned by TNZ, 62% of New Zealanders intended to spend the money they saved on overseas holidays due to COVID-19 on domestic holidays. TNZ, the marketing agency responsible for marketing and selling tourism internationally, was virtually redundant due to the closure of the border. The government gave the agency responsibility for marketing New Zealand to New Zealanders (Ketter and Avraham, 2021) with campaigns such as *Do Something New, New Zealanders* [6].

The government also invested heavily in regional tourism allowing regional destinations from Dunedin to Northland to run domestic tourism campaigns.

Mercurial consumption. During recessions, impulse purchases dramatically decline, and tourists seek out bargains. This means planned purchases come to the forefront. Those with responsibility for household budgets search more deeply for information. They want to know about everything, including activities, experiences, reviews and prices (Foresight Factory, 2018; McBain *et al.*, 2020). From a destination or tourism business perspective, the emphasis lies on pre-planning rather than impulse purchases (Lücka and Seeler, 2021; Sánchez-Pérez *et al.*, 2021). The Faroes Islands [7] promotional campaign during COVID-19 offered tourists a virtual holiday (thus providing pre purchasers with an immersion experience of being there virtually). Mercurial consumption is also about special offers, searching for a deal on https://new.grabone.co.nz/ and price comparison on https://www.trivago.co.nz/.

What happened:

Consumer confidence dropped significantly (Figure 5) in 2020 against a backdrop of COVID-19 arriving in New Zealand and lockdowns, particularly for major household purchases including holidays. A significant drop in consumer confidence changed purchasing decisions as consumers tended to save, become thriftier, search for bargains, budget and undertake more planning (Mehta *et al.*, 2020; Yeoman, 2013).

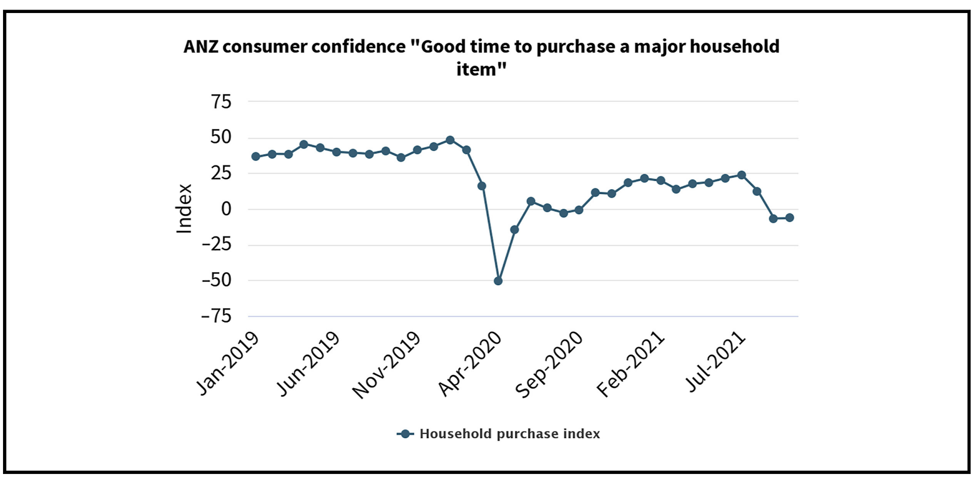
According to the New Zealand Consumer Lifestyles (Watkins *et al.*, 2021, p. 11):

> Continuing trends noted in 2015, many consumers believe that they are paying too much for goods (43%) are not satisfied with the prices they pay for products and services) and that these are too often of variable quality. Price remains a key consumption decision factor for 80% of people and 45% say the lowest priced products are usually their first choice. Moves towards more frugal living have also increased, as have efforts to reduce personal credit card debt with significantly more consumers agreeing that it is important to live within one's means (72%) (p. 11).

According to the TellMe Lifestyle's Survey (Colmar Brunton, 2021, p. 12), 34% of New Zealanders are saving more money than they used to:

> There's a push to put more money aside in case of an emergency compared to a year ago, particularly for those in the younger age groups. COVID-19 scared a lot of us (who were able) to save an emergency fund. When we are buying big-ticket items, we are now spending more time thinking about whether it is something we need (p. 12).

Figure 5 Consumer confidence



Regional tourism organisations from the Coromandel [8] to Dunedin [9] put emphasis on discounts and special offers to entice New Zealanders to sample the regions. Tourism operators started to create packages for the domestic market to stimulate demand. Headlines appeared such as "Fancy a week in a rental motorhome that will cost you hundreds rather than thousands? Or a night in a flash hotel with an 80% discount?" (Cropp, 2020, p. 1).

Coronavirus may have restricted travel, but it also spawned some very tempting offers as tourism came to grips with a much smaller 100% pure local market of more budget-conscious customers. Businesses previously reliant on free-spending international travellers had to rethink what they offered and how much they could charge.

End of adventure. During economic recessions, the purchase of holidays is more evidently based on preplanning rather than impulse. This is especially the case amongst those who manage the household budget (Bronner and de Hoog, 2014; Pappas, 2021; Yeoman, 2013) as they search for bargains and special offers. With the advancement of technologies, big data and predictive analytics society are seeing the personalisation of recommendations. Hence, the term "end of adventure" is chosen; a term coined by the Foresight Factory (2015) as trends such a big data and ubiquitous computing mean collection information about your behaviours and motivations; hence, companies can tailor holiday recommendations specifically for the purchaser (Li *et al.*, 2020; Yallop and Seraphin, 2020).

What happened:

As a response to COVID-19 and the closure of New Zealand's borders, the government invested heavily in various tourism campaigns. Funding was given to the Regional Tourism Organisations throughout the country to develop new products and experiences for the domestic market. A focus was put on website content for attractions, places and things to do and see in the regions of New Zealand. As part of an NZ$400m tourism recovery package, NZ$10m for a digital capability to build website content, NZ$15m for domestic transformation and NZ$20m to support regional tourism organisations with local campaigns were spent (Ministry of Business, Innovation and Employment, 2020). The funding included the building of new digital predictive analytical tools for TNZ and the regional tourism organisations to focus on target markets and segment tourists through a new Domestic Growth Insight Tool (https://www.dgit.nz/) (Tang, 2021).

During COVID-19, tourism businesses placed stronger emphasis on retargeting, the marketing practice that specifically targets visitors to websites who have browsed but not purchased (Kangas *et al.*, 2021). In particular, because of lockdowns and the exponential increase of visitors to websites, small to medium enterprises became savvier about retargeting website visitors in New Zealand (SocialMedia, 2022).

Localism. Across the globe, the trend of localism has been advancing as tourists (Towner and Lemarié, 2020), and consumers are invited to show their support for all that is local, to boost their neighbourhood or town or region by buying products with proximate provenance, choosing companies that engage actively with local communities, participating in voluntary schemes or holidaying in one's own country. The political emphasis on localism brings forth utopian values of improved quality, guaranteed freshness or eco-and friendlier footprints (Foresight Factory, 2019).

What happened:

Campaigns such as *support local, shop local* [10] were developed to get businesses to tap into the good citizen phenomena (Wen *et al.*, 2021). As such, in New Zealand, localism has become the new political word for tourism (Oliver, 2019). Localism is catalysed by a sense that society is in decline or that urbanisation and globalisation carry detrimental consequences for communities. For example, in Wellington, the economic development agency ran campaigns called *Love Local* (Perks, 2020) to get Wellingtonian's to explore their region, coupled with a strong emphasis on Visa Wellington on a Plate, the local food and drink festival (Meikle, 2021).

Healthy habits. The concept of health has developed from something associated with diet and physical exercise to a holistic entity. There has been significant attention placed on mental health and well-being, from government reports, media articles and the growth of mindfulness and meditation resources (Quorin *et al.*, 2020).

What happened:

During COVID-19, because of social distancing and lockdowns, there was a renaissance in cycling and the purchase of bicycles, with 21% of New Zealand consumers cycling for exercise at least once a week in 2020, up by 22% compared to 2019 (Euromonitor, 2020). This upward trend is supported by research by Waka Kotahi NZ Transport Agency (2018), which found that there were on average 3,000 dedicated touring cycling tourists (not Mountain Biking) in New Zealand in 2018 compared to 1,000 in 2008. This represents a threefold increase in ten years.

According to the TellMe Lifestyle's Survey of New Zealanders during COVID-19 (Colmar Brunton, 2021, p. 19):

> There was a newfound love for exercise during the pandemic. Bike purchases soared with some reports of a 12-month waiting list. For households with dogs, there were plenty of walks to be had in a day. Over a third of us are spending more time outdoors doing exercise compared to a year ago, this could be driven by the need to get out of the house. Those with higher-income households are more likely to be running, cycling, or swimming in their spare time (p. 19).

Presence-free living. COVID-19 meant people in New Zealand could not go to work or attend a conference in person. Various big events worldwide, such as the Olympics, rugby matches and festivals, were cancelled or postponed (Forrest *et al.*, 2020). Consequently, digital alternatives to the physical presence have come about. Many people learnt to socialise via zoom with live events and social gatherings (McKenny *et al.*, 2021). Online meetings, which were a niche market, for example in science education for small groups, became the norm. Conference delegates no longer had to consider climate change and jet lag, and instead only had to switch on the computer and have a virtual presence (Forrest *et al.*, 2020).

What happened:

In New Zealand, tourism was affected by COVID-19, with the events and meetings sectors affected more than others because of restrictions on the number of people attending events and social distancing regulations. At the same time, the word "zoom" entered the everyday language (Becken *et al.*, 2021). A qualitative study by Becken and Hughey (2022, pp. 118–119) highlighted how COVID-19 has changed behaviours in New Zealand business travel, in particular the attending of online meetings and conferences. The following quotations are a representation of the changes that occurred:

Online meetings were perceived to provide different benefits and meaning, for example, about greater flexibility, efficiency, equity and higher participation rates. One senior leader reflected on an online zoom meeting that replaced an international national parks conference: "One might have said that communication went down. Several people observed that actually, they can run zoom calls with their whole team, hundreds of people. And you get a much higher engagement and hit rate [. . .], communication became more effective in that sense" (SL1). Most interviewees felt that online meetings were efficient when the purpose is to exchange information. They also represent a democratic platform where "everyone gets a turn to talk" (M2), including people who are introvert and might not speak up otherwise. The chat function was seen as an equity-enhancing tool. Increasing the share of online meetings particularly appealed to participants who had travelled frequently before the pandemic and who felt that travel took a toll on their personal life.

Slowed trend

Materialism. Based on the theory of social change and human development (Gilovich *et al.*, 2015; Kumar and Gilovich, 2015; Sirgy, 1998), during a recession, values and behaviours change

(Ku *et al.*, 2020). People become more concerned for others and collectivism and move away from individualism. One of the notable trends is a concern for consumption and waste. Thrift and mercurial consumption mean materialism, and personal possessions become less important.

What happened:

According to the New Zealand lifestyles survey, the "Educated Liberals", which represent over a third of the New Zealand population (Watkins *et al.*, 2021), are a segment whose values are characterised by an emphasis on universalism, benevolence and self-direction, and who place a strong emphasis on the importance of justice, equality, integrity, the community and environmental protection. Although materially well off, and the least concerned with economic uncertainties, they are not driven by materialistic status and try to live sustainably, avoiding excess packaging and making conscious efforts to support local businesses. This segment based on values has increased from 20% in 2015 to 34.3% in 2020. This finding is supported by the TellMe Lifestyle's Survey (Colmar Brunton, 2021), which reports that over 50% of New Zealanders are now spending more time thinking about whether something is needed. Here the emphasis lied on materialistic goods. During lockdowns, the emphasis in terms of importance shifted to thinking about friends and families and away from possessions and goods.

The survey (Colmar Brunton, 2021, p. 12) drew out was that:

> Media messaging around "kindness" and "community" are reflected in our survey results: We're looking out for those around us and feeling more tolerant of our fellow New Zealanders. Those who are feeling more open with friends and family about their feelings are more likely to be doing ok (p. 12).

Arrested trends

Decline of deference. Today's world includes fake news and popularism. Public respect and trust for institutions, experts and government has declined (Monaghan, 2020). There has been a degree of scepticism about the quality of the information provided by economists, academics and tourism leaders (Yeoman, 2008) before COVID-19. COVID-19 has changed that with expert opinions becoming the norm (Mazey and Richardson, 2020). Dr Ashley Bloomfield, Director of Public Health, became the public face of COVID-19 across the New Zealand media (Cairney and Wellstead, 2021).

What happened:

According to Goldfinch *et al.* (2021, p. 3), trust in the New Zealand government during the COVID-19 pandemic was described as:

> We find trust in government has increased dramatically, with around 80% of respondents agreeing government was generally trustworthy. Around three quarters agreed management of the pandemic had increased their trust in government. Over 85% of respondents have confidence that public health scientists work in the public interest (p. 3).

From a tourism perspective, Chris Roberts, CEO of the Tourism Industry Aotearoa, has been the voice of the tourism industry throughout COVID-19 (Fyfe, 2020). For his leadership role, Chris Roberts was recognised as one of only two New Zealanders to receive an Influencer of the Year award in 2021 from the Australasian Society of Association Executives (AuSAE) in 2021 (Tourism Industry Aotearoa, 2021, p. 1):

Extreme experience seeking. The desire to accumulate experiences in addition to material possessions will continue to flourish, but mostly those that are relatively cheap and connect people to nature (Mackenzie and Goodnow, 2020). Exotic experiences that are expensive, frivolous, risky or environmentally destructive – such as driving a racing car [11] or bungee jumping [12] (Flatters and Willmott, 2009), are declining. Part of the appeal of extreme experiences is that people feel the experience differentiates them. However, conspicuous consumption is now out of favour as simplicity and wholesome thrift trends dominate.

What happened:

According to Ives (2021, p. 1), Executive Officer of the Regional Tourism Organisation of New Zealand stated that "Anecdotally the adventure sector has suffered significantly as a lot of it is infrastructure-heavy (aircraft, boats, rafting etc), and trying to pivot to domestic by offering a different or cheaper product is challenging".

Queenstown is a New Zealand adventure tourism capital driven by international tourists rather than domestic tourists (Mackenzie and Goodnow, 2020). The impact of COVID-19 on the destination and adventure tourism operators was well documented in numerous newspaper stories, including (Jamieson, 2021, p. 1).

> Queenstown is facing an economic crisis as a mounting number of tourism businesses are forced to close their doors, mayor Jim Boult says.
>
> Adventure operators, bars and hotels are having to make the difficult call to close indefinitely due to the lack of tourists and uncertainty over border closures during the worldwide Covid-19 pandemic.
>
> Queenstown's 220-room Millennium Hotel was one of the largest businesses to shut its doors – closing at the end of January – and was joined by popular bar Muskets and Moonshine about the same time.
>
> Queenstown attracted more than 1 million international visitors in 2019. Since the New Zealand borders closed last March, that has been reduced to almost zero.

Mobility. COVID-19 was first detected in Wuhan on the 1st of December 2019 and then rapidly spread throughout the world. By April 2020, globally cases reached two million with 125,000 deaths. According to Gössling *et al.* (2020, p. 1), in the absence of a vaccine, most countries had to resort to control mechanisms such as social distancing, stay-at-home orders, cancellation of events and closure of schools and non-essential businesses.

International, regional and local travel restrictions immediately affected national economies, including tourism systems, i.e. international travel, domestic tourism, day visits and segments as diverse as air transport, cruises, public transport, accommodation, cafés and restaurants, conventions, festivals, meetings or sports events. With international air travel rapidly slowing as a result of the crisis, and many countries imposing travel bans, closing borders or introducing quarantine periods, international and domestic tourism declined precipitously over weeks. Basically, tourism came to an abrupt halt, and the concept of tourist mobility was no more (Hall, 2015; Lohmann and Panosso Netto, 2017).

What happened:

COVID-19 and lockdowns brought a halt to international arrivals in New Zealand. When New Zealand closed its borders on the 19th of March 2020, the country's largest export industry was no more. An industry that represented NS$17.2bn or 20.4% of New Zealand's total export earnings came to a halt. Various attempts through travel bubbles were made to reopen tourism with Australia. Out of the 84 days that the transman bubble operated, only seven had no travel restrictions (Ives, 2021; Nouvellet *et al.*, 2021).

The missed trend

The trend that the authors of this paper did not foresee in May 2020 was "the desire for new experiences" (Pine and Gilmore, 2011; Seeler and Schänzel, 2019; Yeoman and McMahon-Beatte, 2019). Flinn (2021, p. 134) points out that the nature of the experience economy is:

> When a person purchases a service, they are buying a set of intangible activities carried out on their behalf but when they purchase an experience, they are paying to spend time enjoying a series of memorable events with which they can engage and connect in a personal way. Moreover, it is important to remember that staging experiences is not about entertaining consumers, it is about engaging them (p. 134).

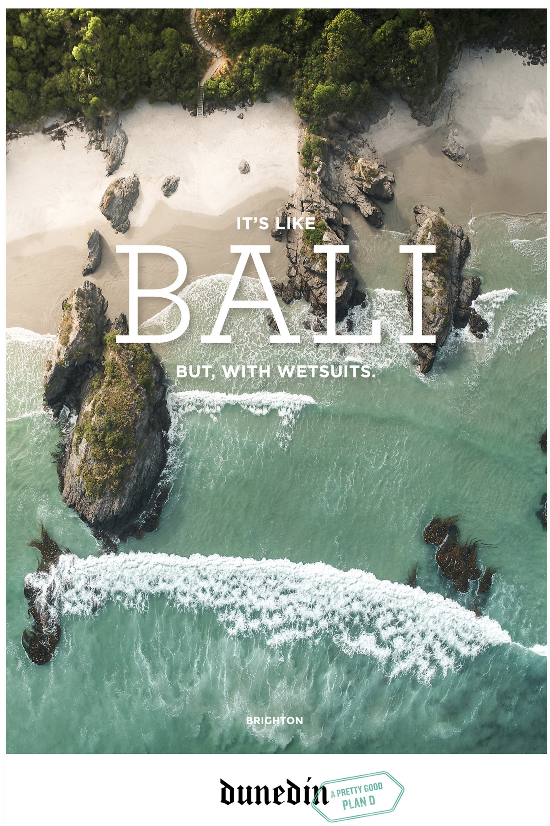
New experiences are about sampling new and aspirational experiences that provide the opportunity to develop new skills, acquire knowledge and do something unusual or something they have always wanted to do (Yeoman and McMahon-Beatte, 2019).

TNZ created a campaign called **"**Do Something New, New Zealand" [13] aimed at getting New Zealanders to travel. TNZ pivoted their international experience to the domestic market after instructions from the Tourism Minister, Hon Kelvin Davis. The campaign intended to get New Zealanders to explore New Zealand, try a new experience and go beyond the main tourism centres through exploring new parts of the country. The intention was on getting New Zealanders to spend monies on commercial tourism products. Further campaigns by TNZ built on this through a focus on a Winter Ski campaign and a regional campaign for Greater Auckland (Tourism New Zealand, 2020). Parallel to this campaign, the Regional Tourism Organisations of New Zealand (RTONZ) received funding to support the development of new products and a campaign to view regions differently. For example, Dunedin Enterprise (McNeilly, 2020) created a campaign called "Dunedin, a pretty good plan D" [14] making comparisons with international icons such as Bali (Plate 1), Edinburgh, the Amazon and the Pyramids.

Conclusions

Those who work in tourism industries are naturally concerned with looking to the future and identifying trends. Practitioners are trained to look at past patterns to assist in seeing forward. COVID-19 has changed this. What was seen in New Zealand, and indeed across the globe, was

Plate 1 It is like Bali, but with wetsuits



Note(s): (Permission: Dunedin NZ)

that planning was not useful. Many destinations threw out their marketing plans and strategic plans and re-wrote them, but even these plans were full of caveats due to the high degree of complexity and uncertainty. It was extremely difficult to make sense of the situation given these variables.

The authors of this paper went through the exercise of using one country as a case to test. Looking at what tourist behaviour trends were expected at the beginning of the pandemic, the authors then reflected after one year. The authors recognised that many trends were realised, but some were also missed and did not predict that people would be seeking new experiences. The campaign identified at the start of this paper, "Do Something New, New Zealand" tapped into people's eternal desire for novelty. Instead, the authors had predicted that people would be seeking the comfort and security of what was familiar during a time of crisis.

The contribution of this paper lies, first, in the evaluation matrix itself, allowing researchers, destination planners and those involved in the tourism industry to evaluate and make sense of COVID-19 based upon the concepts of dominant, slowed, advanced or arrested. Second, the simplicity of the evaluation matrix, drawing upon the idea from Flatters and Willmott (2009), is useful in future research as the evaluation of trends or drivers of change form the foundation of constructing scenarios (Davis and Pyper, 2015; Postma and Yeoman, 2016; Van der Heijden *et al.*, 2002), i.e. deciding which trends to follow and use in a scenario matrix. In the tourism sphere, there are several publications that discuss trends, such as Buhalis and Costa (2006), Dwyer (2015), Richards (2018), Monaco (2018) and Fountain (2021). However, they lack in providing details on the selection and evaluation of these trends. Whereas Postma and Papp (2021) use a trends pyramid in the evaluation and systematic selection of tourism trends, which is a tool used extensively in future research (Cramer *et al.*, 2016; Halter and de Arruda, 2009; Maenhoudt, 2014). Therefore, the matrix used here provides an evaluation framework that contributes to our understanding of the impact and movement in tourism futures research.

Third, the findings could be generalisable about the changes and movements associated with the concept of simple identity for several reasons. Although this paper is specific to New Zealand tourism, similar findings could be associated with other countries. In addition, the present geopolitical uncertainties associated with Ukraine and the economics of global inflation could lead to similar trends being identified. Fourth, this paper has tested the ability to predict trends and behaviour of tourists in an uncertain environment within the context of Bergman *et al.*'s (2010) ontological paradigm, allowing for the prognosis and prediction of future states.

Notes

1. https://www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-recovery/tourism-futures-taskforce/
2. https://www.mbie.govt.nz/immigration-and-tourism/tourism/destination-management-guidelines/developing-a-destination-management-plan/
3. https://covid19.govt.nz/alert-levels-and-updates/
4. https://www.dgit.nz/domestic-traveller-segments/
5. https://www.mbie.govt.nz/immigration-and-tourism/tourism-research-and-data/tourism-data-releases/tourism-electronic-card-transactions/
6. https://traveltrade.newzealand.com/en/campaign/dosomethingnewnz/
7. https://www.remote-tourism.com/'
8. https://www.thecoromandel.com/travel-planning/specials-and-deals/
9. https://www.dunedinnz.com/visit/dunedin-deals
10. https://www.support-local.nz
11. https://www.everythingqueenstown.com
12. https://www.bungy.co.nz/
13. https://www.tourismnewzealand.com/news/do-something-new-new-zealand/
14. https://www.dunedinnz.com/visit/plan-D

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