Sustainable Tourism 2040
A manifesto

Stenden | etfi European Tourism Futures Institute

The content of this manifesto is intended to be a contribution to current research and to identify future directions for the development of a sustainable tourism industry in Europe. The material presented herein and the views expressed were produced by various members of the network by means of Delphi research and a workshop. The text represents the interpretation of the findings and the views of the authors and should not be regarded as representing the collective views of the European Tourism Futures Institute or the Academy of International Hospitality Research staff or their research-funders. Compiling this report was done with the utmost care; however, the authors and the organisations they represent are not liable for any damage resulting from the information provided in this publication.

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| Albert Postma | Ernesto Spruyt | Elena Cavagnaro |

Authors:

Albert Postma, European Tourism Futures Institute
Stenden University of Applied Sciences
Ernesto Spruyt, Mobbr Crowd Payments
Elena Cavagnaro, Academy of International Hospitality Research
Stenden University of Applied Sciences

Management summary

In this manifesto the European Tourism Futures Institute challenges the way sustainable development is practiced by modern tourism businesses. The European Tourism Futures Institute wants to satisfy the need for an approach where the commercial interests of the industry are connected with the real meaning of sustainability. The institute believes that tourism business could use the original principles of sustainability as a source for gaining competitive advantage.

This manifesto describes the notion of sustainable development according to its basic appeal for economic, social and environmental value-creation, together with the implications of its meaning at the level of the individual (the manager), the organisation (the business) and society. As sustainable tourism is focused on the long term, foresight is used to develop four scenarios for a sustainable tourism industry in 2040: "back to the seventies", "captured in fear", "unique in the world", and "shoulders to the wheel". The implications of the scenarios are mapped for four distinct types of organisational DNA: the blue organisation focusing on quality, professionalism and efficiency, the red organisation for whom challenge, vision and change are most important, the yellow organisation addressing energy, optimism and growth, and the green organisation which is led by care, tradition and security. The manifest concludes with strategic propositions for tourism organisations in each of the four business types and each of the four scenarios.

Preface

Sustainable Tourism 2040 is a European Tourism Future Institute's (ETFI) project. The ETFI is a joint initiative of Stenden University of Applied Sciences and their business partners in order to help the tourism industry become more sensitive to possible future developments, to understand and give meaning to these developments and to learn to anticipate them by means of new business concepts, new leisure concepts and new business models, etc. Only if the tourism industry is able to observe developments in the business environment and to consider and anticipate possible implications of these developments, can it achieve a sustainable growth.

The ETFI fulfils its tasks by means of futures' studies and scenario-planning. Its projects can be divided into two categories. In the first place, several businesses, governments and institutions have asked the ETFI for support with developing a new vision and a new strategy. Examples of projects in this field are Youth and Watersports; the Notting Hill Carnival Futures 2020; a study of the new international market opportunities resulting from the extension of the airstrip at Groningen Airport Eelde; and the future of the medium-sized town centre of Leeuwarden (Cultural capital in 2018).

The ETFI also initiates projects that are related to relevant developments that the Institute observes in the tourism industry or in society. The recent project on the future of visitor attractions is an example in this field. Sustainable Tourism 2040 can also be regarded as an example of a project in this area. The ETFI has observed that sustainability is often applied as a quick fix without a firm grounding in businesses vision and strategy. At the same time, the ETFI believes that sustainability offers commercial opportunities for tourism businesses across Europe that they are not yet aware of. The aim of this manifesto is to underline the importance of sustainability and its potential relevance for the industry. The manifesto takes a long-term perspective. With the help of foresight, scenarios have been developed that connect the economic, social and environmental dimensions of sustainability with the typical characteristics of an organisation's DNA.

The European Tourism Futures Institute looks forward to an ongoing discussion of the report's findings and hopes that these will serve to develop and strengthen the sustainability of tourism in the years to come.

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1. Introduction

The concept of sustainable development was born in 1987. Since the Club of Rome published its alarming report *Limits to Growth* in 1972 there have been worries about the consequences of ongoing economic growth and the resulting negative social and environmental consequences. In 1987 the Brundtland Commission (the World Commission on Environment and Development, under the supervision of the Norwegian prime minister Gro Harlem Brundtland) explicitly called for attention to be paid to these effects and introduced the idea of *sustainable development*, which, essentially, seeks to meet the needs of both the present and future generations. Since its inception the concept has raised a lot of discussion, both in the world of tourism and in academic circles. Whilst the ethical dimensions are clear, many have criticised its abstract definition and the limited potential of its practical uses. However, as the concept has been gradually embraced by the consumer, many tourism businesses have responded by 'greening' their business. So far, this has led mainly to concrete measures such as eco-labels, towel-reuse policies, led lights, etc. in order to seduce customers into buying their product or service in a highly competitive market.

This is not enough to make the tourism industry really sustainable. As, by definition, sustainable development is about the creation of value for this and the next generations, it should include a vision of the long term, of the future. Therefore, we at the Institute regard it as our duty to give direction as to how the tourism industry could integrate the principles of sustainable development into its strategic propositions. Together with other leading knowledge institutions of the European Tourism Futures Research Network the Institute has taken the initiative by writing this manifesto.

Here four scenarios are presented for a sustainable tourism industry in 2040. Each of the scenarios is translated into concrete strategic propositions for four different types of businesses and organisations. In so doing, with this manifesto the authors want to emphasise the economic need for tourism businesses to act sustainably and to give guidelines for businesses to achieve competitive advantage in relation to sustainable development.

In the following pages, first of all the contemporary application of sustainability in tourism business and the need to use sustainability as a source for competitive advantage will be described in chapter two. To address this challenge, the Institute has used a unique approach that connects the concepts of sustainability, foresight and organisational DNA. These concepts will be described in chapter three. Then four scenarios for a sustainable tourism industry in 2040 will be presented in chapter four and sustainability through the lens of four types of organisational DNA in chapter five. Linking the scenarios with the four types of DNA gives an indication of the strategic propositions for different types of tourism businesses. These strategic propositions are listed in chapter six. Finally, some conclusions are given in chapter seven.

2.   The issue

2.1 Sustainability in business: too much risk-driven

Sustainability has become part of the standard set of business management issues over the past decade. In fact, it has become increasingly necessary to have a sustainability policy in order to keep a 'licence to operate'. Companies that do not adapt to this trend will face increasing pressure from governments, investors, NGOs, the media and consumers.

Of course, this is not a coincidence. The emergence of sustainability as a boardroom topic is a symptom of a changing world in which resource scarcity, population pressure and technological developments are shaking up the circumstances in which companies operate under ever-increasing pressure. Sustainability in that sense literally means the degree to which the ecological, economic and social system we depend upon can provide the necessary support for the way we do business.

Whether or not to have a sustainability policy is really not an issue any more. But how to successfully incorporate sustainability into the business case, that's a different question altogether. Even among the so-called sustainable front-runners it is difficult to find sustainability policies that are relevant to their customers and at the same time contribute to a distinct competitive positioning.

In recent years sustainability has gained significant strategy relevance in the supply chain, as companies increasingly realise they need to secure access to key natural resources. This is in fact a defensive strategy, which revolves around the absorption of societal costs and changes in the business environment. But the absorption of costs, whether or not they are societal in nature, is only half the story. Creating revenues is the other half. In the end, to create value businesses have to transform costs into higher revenues. This is the challenge that companies also face in the tourism sector: how to turn the unavoidable trend of sustainability into an opportunity for creating more value.

2.2 Creating Shared Value: sustainability as a source for competitive advantage

At the start of 2011 the renowned *Harvard Business Review* published an article by Michael Porter - the 'godfather' of business strategy - about Corporate Social Responsibility (CSR) and sustainability (Porter and Kramer, 2011). His plea was for a next step - a principle - in CSR and sustainability policies, which he called Creating Shared Value (CSV). This principle states that these policies can be successful only if they simultaneously create value for society and for the organisation itself.

As far as Porter is concerned, this is a reinvention of capitalism, not because of ethical considerations, but to correct a flaw that is necessary for innovation and growth. The flaw that needs to be corrected is that companies are not disconnected from their environment, and that the nurturing of their environment should be part of the value-creation process.

The perception that capitalism has become something that has undesirable societal outcomes is not really new. A host of NGOs such as Greenpeace and Fair Trade have been saying this for decades. What is new is that this idea has now been adopted by a rather conservative corporate publication as *Harvard Business Review*. The effect of Porter's article could be the convincing nullification of the duality between the capitalist economy and civil society activism.

Porter points out that many CSR and sustainability policies are about the redistribution of value, while CSV generates value both for businesses and society. He encourages companies to look for opportunities for shared value in three areas (Porter and Kramer, 2011):

- the market: reinventing products and markets
- the supply chain: redefining productivity in the production chain
- geography: formation of regional clusters

One recognises in this some older concepts that have been propagated by Porter in the past. The problem with CSV as defined by him is that it remains merely a principle. Porter fails to provide concrete tools and methods for companies to support their implementation of this principle. In the following chapters, our aim is to address this shortcoming by providing a framework for businesses to answer the following question: how can sustainability be used as a source for competitive advantage?

2.3 Competitive advantage in a nutshell: relevance and distinctiveness

According to Michael Porter, business strategy is about creating a sustainable competitive advantage over the competition (Porter, 1985). To be successful as a business you have to maximise:

1) the relevancy of your offering for your customers; and
2) the distinctiveness of your offering compared to other players in the market

A common mistake in business strategy is to confuse relevancy with distinctiveness. Critical Success Factors (CSFs) are those conditions, which businesses have to meet in order to be relevant. In other words, CSFs are conditional in order to compete in certain markets. By definition, therefore, they are not distinctive, because all the competitors have also to meet these conditions. Unique Selling Propositions (USPs), on the other hand, are those elements of a business offering that set it apart from the competition (Daniel, 1961; Levitt, 1987; Johnson and Friesen, 1995). They are (or at least, should be) distinctive in nature.

The mix of relevancy and distinctiveness together determine the position a business has in the market, the so-called positioning in order to develop a strategy for achieving competitive advantage (Trout, 1969; Ries and Trout, 1981). Choosing the positioning should, therefore, be the starting point (Trout and Rivkin, 1996). When the positioning is clear, the rest of the strategy - including the sustainability policy - will follow automatically (Van Eck, Willems and Leenhouts, 2008).

As far as integrating sustainability into the core strategy is concerned, companies face two challenges:

- how to make sustainability relevant for my customers?
- how to use sustainability to distinguish ourselves from the competition?

2.4 Grey-washing: the opposite of making sustainability relevant

In any public debate on sustainability the term 'green-washing' occurs sooner or later. Green-washing is the practice of presenting products or production processes as more sustainable than they actually are. This behaviour is, of course, undesirable. But what is also undesirable - from a competitiveness point of view - is 'grey-washing': i.e. failing to bring your investments in sustainability to value for your customers, employees and/or stakeholders. In other words, failing to make sustainability relevant.

Grey-washing is widespread and this is for a reason. Research shows time and again that, although people as citizens are in favour of sustainable practices, as consumers the vast majority do not want to be confronted with sustainability and the problems that relate to it (Gfk Panel Services, 2009; Trendbox, 2011). As a result, managers and marketers believe that - reasoning from the desire to fulfil customer needs - they should not bring sustainability up. The result is that sustainability policies have become detached from product development and marketing.

This may seem prudent because products should be based on actual consumer needs and not on what businesses want to impose on the customer. But, as businesses have to make the investments anyway, it is advisable to create a customer preference on the basis of sustainability. In such cases 'sustainability' doesn't become a benefit in itself, but is a 'reason to believe' for other, existing buying motives. For example, research initiated by the strategic marketing agency Business Openers (http://businessopeners.nl/) shows that 'sustainability' can be successfully used as proof of product quality or innovativeness.

Marketing 'sustainability' is, therefore, a matter of making choices. There are three:

1. *Aim for the 'ethical' customer*. These are people who not only have a positive attitude to sustainability, but also translate this attitude into purchase behaviour. This comes down to marketing sustainability as a 'benefit'. On the one hand, this is the easiest strategy, because this group exists and is ready to buy. On the other hand, the size of the group remains limited, generally only a 2-5% market share of a product category.

2. *Turn the existing customers into ethical customers.* Try to elevate the existing large group of customers who do not buy to a higher level of conscious purchasing behaviour. Practice shows that this is very difficult. Unilever is probably the best example of a company following this strategy, with their Unilever Sustainable Living Plan. Despite considerable effort, so far they have not been successful as there is no evidence whatsoever that they had any success.

3. *Integrate sustainability with existing buying motives.* This means aiming sustainable products at customers who are not primarily interested in sustainability, without presenting sustainability as a 'benefit'. The key here is to create value for customers with product features that might be considered sustainable, but that are not positioned as such. The sustainable features should be rather presented as a 'reason to believe' for other benefits that regular customers are seeking; e.g. quality, innovativeness, health or taste (Willems, 2011).

Considering that the ethical niche is generally limited to 2-5%, the third option is probably the most relevant for companies in any sector, including the tourism industry.

Now that we've formulated an approach to increase the relevance of sustainability policies for the consumer, let us have a look at how this can be done in a way that increases distinctiveness which is hard to copy.

3.   The theoretical framework and approach

This manifesto is based on a study that connects three core concepts: the concept of sustainability, the concept of foresight, and the concept of organisational DNA.
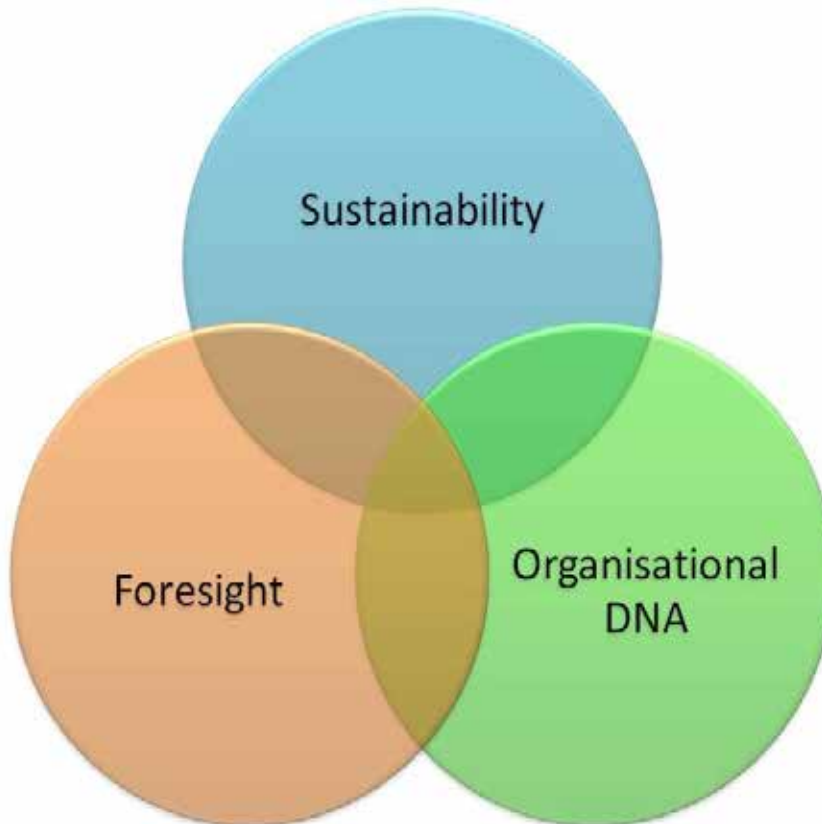

Figure 1. Core concepts of the study.

3.1 Sustainability

Sustainability is often described as protecting and conserving the natural resources of Planet Earth. This insistence on the natural environment is understandable, but it is not correct. It is understandable because the environmental movement has for decades been the key force in promoting sustainability. It is incorrect because the economic and social dimensions of sustainability have been part of the modern discussion on sustainability almost from its beginning. Consider, for example, the landmark book *Limits to Growth* by the Massachusetts Institute of Technology (M.I.T.) (Meadows *et al.*, 1972). The M.I.T. used five factors to construct their scenarios for the world in 2100: accelerating industrialisation; population growth; availability of food; depletion of natural resources; and degradation of the environment, resulting in pollution. These five factors reflect all three dimensions of sustainability. For example, accelerating industrialisation is an economic factor, whilst population growth is a social force and pollution an environmental one. That sustainability is more than environmental protection is confirmed by the report of the UN World Commission on Environment and Development (1987) and the outcomes of the Earth Summit in Rio de Janeiro (1992). The by-now classic definition of sustainable development by the UN World Commission on Environment and Development, for example, refers to quality of life for present and future generations alike. In other words, whilst environmental protection is needed to cater for the needs of the future, socio-economic development and a better distribution of resources are required in order to address the need of the present (Cavagnaro and Curiel, 2012).

The Earth Summit in 1992 marks an important moment in the history of sustainability by involving the business world in the change process towards sustainability. Until then it had been generally believed that only governments could lead this change, whilst the business world was considered to be indifferent and unresponsive. Now, in 2014 it cannot be denied that business has engaged in the sustainability agenda. Even though there are still too many examples of lip-service, several businesses have indeed integrated sustainability principles in their operations in order to create value to on the environmental, social and economic dimension. Using the terminology introduced by John Elkington (1998) sustainable organisations create value on the triple bottom line of planet, people and profit. Elkington's proposition is similar to Porter's idea of shared-value as presented above; the point both make is that businesses cannot be said to create value for society if, in cutting profits, they disregard the consequences for the natural environment and for people. Examples from the tourism industry will be given in section 3.2.

Both governments and organisations are thus recognised as agents of change towards sustainability. Yet, it can be argued that whilst societies consist of organisations, organisations comprise individual human beings. It is therefore necessary to understand the role that individuals play in the transition to sustainability by highlighting the values that inform sustainable choices. On the basis of an analysis of studies from different disciplines, individual values have been be labelled as follows: 'care for me'; ' care for me and you' and 'care for all' (Cavagnaro and Curiel, 2012). 'Care for me' refers to so-called egoistic needs. People may choose sustainability because they think, for example, that it can save them money. 'Care for me and you' refers to the human capacity to empathise with others, i.e. altruism. Pro-social choices, such as buying Fair Trade products, are often informed by this type of values. 'Care for all' illustrates the capacity of people not only to take care of themselves and other human beings, but also to take care of other creatures and even inanimate objects. As illustrated in *Figure 2*, these three human values can be set at the centre of the triangle illustrating sustainability at the level of society and organisations. The message conveyed by the framework in *Figure 2*, is that human values are central in the process of achieving sustainability. The leaders of organisations guided by 'care for me' will focus on profit and economic growth and address sustainability only in so far as it reduces costs. 'Care for me and you' leaders will connect to the quest for profit a genuine interest for people's safety and development; 'care for all' leaders will add a concern for all living creatures and the Earth as a whole.
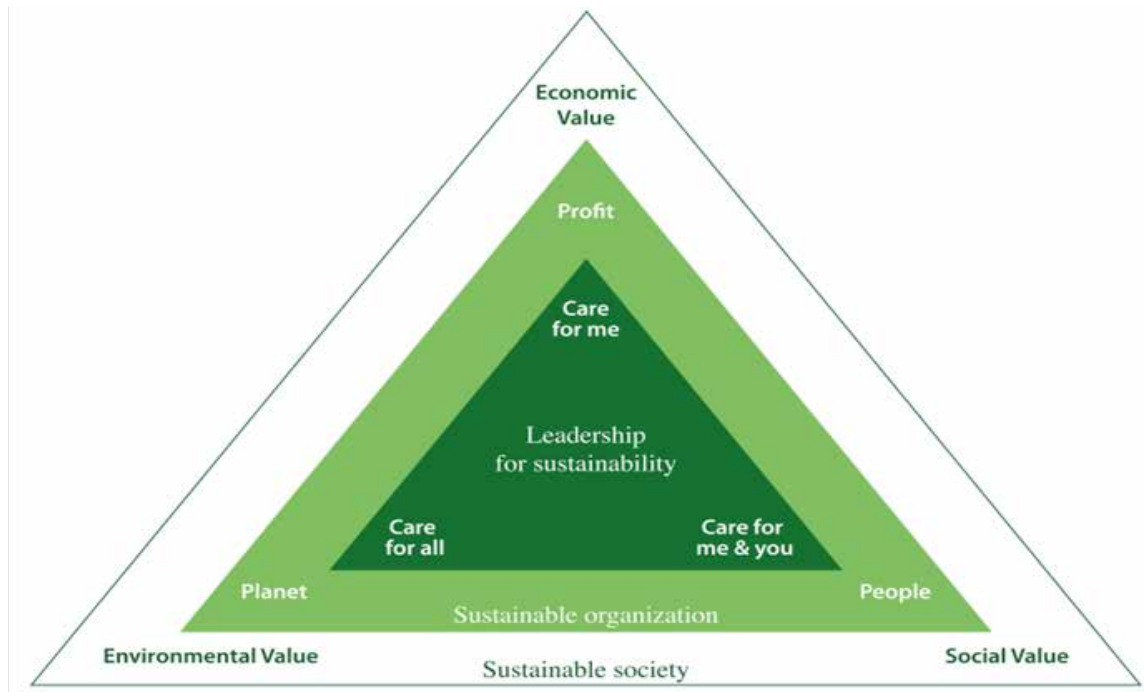

Figure 2. The three levels of sustainability (Cavagnaro and Curiel, 2012).

Summing up the discussion so far, sustainability is understood here as a multi-level and multi-dimensional concept. It consists of an economic, social and environmental dimension at the level of society, organisations and individuals. To this illustration of sustainability a dimension should be added: 'the future'. Sustainability is about the future; it is a means by which to ensure that humanity has a future. On the same line the sustainable vision of an organisation is its vision for the future. At the individual level, called leadership for sustainability in *Figure 2*, adding the future dimension would mean that individuals are asked to consider their own future as part of the future of our common home: Planet Earth.

3.2 Sustainability and tourism

Sustainable businesses, in the understanding of sustainability described above, create value on a dimension of profit, people and planet. Whilst the plea of sustainability is that all organisations worldwide should opt for sustainability, this manisfesto focuses only on the tourism industry in Europe. Sustainability is not a 'one size-fits-all concept' and should, therefore, be specified for different industries and for different types of business within the same industry.

The choice for tourism in Europe is not perfunctory. Europe is still a major tourist destination, with six states in the European Union (France, Spain, Italy, Turkey; United Kingdom and Germany) and one from outside the European Union (the Russian Federation) among the world's top ten destinations for holidaymakers (UNWTO, 2013). Tourism accounts for more than 5% of the European Union (EU) Gross Domestic Product and this percentage is expected to grow in the future (Eurostat 2012). Tourism is thus a major driver of economic development and it has also a major impact on the social or people dimension of sustainability. Consider, for example, that it is estimated that 17 million people are currently employed in tourism in the EU (Eurostat, 2013); worldwide 1 in 11 jobs is in tourism (UNWTO, 2013).

Alongside the positive aspect of tourism as a force for socio-economic development, there is also a downside. Jobs in tourism are often seasonal; the wages are low and the hours irregular. Moreover, the impact of tourism on the local community at a destination is not *per se* positive (Postma, 2013). Without proper management, tourism may not bring the socio-economic improvement that many underdeveloped areas in Europe expect from it. On similar lines, without proper management tourism may have quite a negative impact on the natural environment (Hall and Lew, 2009). It has, for example, been estimated that tourism is responsible for 5% of the carbon emissions worldwide, mostly because of transportation (UNWTO-UNEP-WMO, 2008).

In conclusion, tourism clearly touches all three dimensions of sustainability: the economic, environmental and social. It offers, therefore, a perfect test case for the transition towards sustainability (UNWTO, 2004). Tourism is also an example because it clearly involves decision-making at all levels of sustainability – the level of societies, organizations and individuals. The individual level moreover is affected by tourism not only at the moment of choice before a journey starts, but also during or after the journey. It is widely recognised that the tourism experience has a major influence on the personal values of the tourist (Andersson, 2007). A well-designed tourism offer may thus support the development of pro-social and pro-environmental behaviour by addressing the 'care for me and you' and 'care for all' values of the tourist alongside his 'care for me'. Finally, the long-term future component of sustainability involves making decisions under conditions of high uncertainties. In this context, tools are required that can take into account unknown risks and opportunities, such as foresight and scenario-planning. These are the tools that the European Tourism Future Institute has developed and applied to tourism in the past few years.

3.3 The complexity of the future

The Brundtland Commission defined sustainable development as a form of development that meets the needs and aspirations of the present without compromising the ability of future generations to meet their own needs (UN World Commission on Environment and Development, 1987). The focus for the next generations means that sustainable development is, by definition, about the long-term future. Understandably, for businesses that are predominantly focused on the shorter term this long-term future is distant and difficult to grasp. But there are other factors that make it difficult to consider how such a sustainable industry would operate in the long term.

In the first place, there is the human factor. Our capabilities to achieve a sustainable future are limited because of several reasons. Our decisions, our choices and our behaviour in the past and in the present cast their shadow: if I choose to spend my money on a new car I cannot use it for my holiday next year. Our knowledge and expectations of the future will direct our behaviour in such a way that our expectations will come true or not, and this we refer to as self-fulfilling or self-denying prophecies. Human inventions and innovations may give the future a different course from the one we would have expected. Indirectly, the way we think, the way we filter the information we receive, andwhat we regard as desirable or responsible, is affected by our paradigms. Paradigms are formed by our parents, our teachers, our friends, the media, etc. The power of paradigms is enormous and we are mostly not aware of how they affect our image of the world and the way to deal with it (Van Asselt et al., 2010)

It is not only the human factor that makes it difficult to influence tourism´s future, but also characteristics of tourism itself. Tourism is a phenomenon that is interwoven with other developments in today's society in a rather complex way. It is composed of different fields that are highly interconnected and interdependent, such as travel, hospitality, recreation, culture and arts, and events. As each of these fields has its own dynamics and perspectives it makes tourism difficult to control and the various services and facilities are owned and managed by a diversity of parties: governments, micro businesses, SMEs, international corporations, nature organisations, citizens, etc. Our knowledge and understanding of this complex industry is too limited to be able to understand and control its future (Cooper and Hall, 2008; Postma, 2013).

In the third place, the vast changes in consumer demand cause a lot of uncertainty with regard to the long-term future, and, as the consumers' knowledge has increased, they have become better informed, more worldly-wise and more demanding. As a result, their influence on the future of the tourism industry is expected to increase (Buhalis and Costa, 2006).

Finally, both supply and demand in tourism are affected by developments in society, both demographically, economically, technologically, ecologically and politically. Because today's society is hyper-connected and highly globalised unexpected events (*wildcards*) in one part of the system will have its implications on the other. Such wildcards could refer to, for example, the Avian flu, the attack on the Twin Towers, the bank crisis, a new invention, etc., all events which cannot be foreseen and are outwith the control of the tourism industry (Cooper and Hall, 2008).

The complexity of the tourism sector and the uncertainties with regard to its long-term future is probably one of the reasons why many in the industry regard the concept of sustainable development as rather vague and not concrete.

3.4 Using foresight as an approach

Foresight is an approach that is able to deal with such uncertainties as given above. It takes the complexity, the dynamics and non-linearity of today's society as a starting point and does not consider uncertainties as awkward problems but as challenges to be anticipated with appropriate business models, innovative concepts and other strategic courses of action. Here it is not the past and present that are projected on to the future, such as in conventional forecasting, but the future that is projected on to the present. This method of foresight has been developed in business practice since the 1960s. By means of a collective horizontal planning process, tourism businesses and their stakeholders are made aware of the complexities of tourism and its meaning. By the business world and stakeholders exchanging and discussing different interests, opinions and experiences, future uncertainties are collectively explored and defined. Ideally, the thinking process of the participants in the operation is stretched and challenged, their paradigms are broken, their the learning and adaptive power is enlarged, and competencies and skills are developed which can then deal with uncertainties (Van Asselt et al., 2010; Martelli, 2001; Varum and Melo, 2009).

The process starts with investigating the driving forces of change, identifying the two key uncertainties in the realm of driving forces, and defining the possible directions to which these two key uncertainties could develop. The possible combinations of the four directional outcomes frame four future scenarios. Thus four scenarios are developed by envisaging a world that is driven by the combination of outcomes of the two key uncertainties and a model is created of the complex business environment in the long term. It should be stressed here that is essential that tourism businesses are prepared for all of these futures. As the scenarios are based on uncertainties it does not make sense to choose only one of them (Van der Heijden et al., 2002).

Subsequently, the 'what if' question challenges the participants to think about the possible implications for their business of each scenario and how they could anticipate such implications. Different scientists claim that this is essential for the competitive power of tourism organisations and tourism businesses (Chermack, 2001; Varum and Melo, 2009).

3.5 Organisational DNA: blueprint for distinctive positioning with sustainability

Extensive research has been done into what determines success in business. One which is famous is the 'hedgehog' principle as formulated by management guru Jim Collins. This principle states that success comes from combining passion, talent and relevance. The implication is that identity - from which passion and talents are derived - is a major determinant for success, and this is confirmed by extensive research (Harter, Koster and Peterson, 2004; Label, 2005; Moers, 2007; Voskuyl, 2009): companies that have a clear sense of identity and use it as a blueprint to shape all their policies and activities perform significantly better than companies that do not operate in this way.

But how to put such an identity into operation? Martijn Driessen (Entrepreneur Consultancy) wrote his Phd thesis on the psychology of successful entrepreneurship. One of the most important insights of his research was that *there is not one particular* kind of entrepreneur; instead, different personality types for different kinds of entrepreneurs. Driessen's work is partly based on the Herrmann Brain Model, which, in turn, is derived from Jung's theory of archetypes. Driessen´s conclusion is that there are four basic types of entrepreneurs: the Pioneer, the Salesman, the Manager, and the Professional (Driessen, 2005).

Driessen takes this concept one step further and poses the theory that the core competencies of each basic type fits one of the different phases of the company life-cycle (start, expansion, maturity, efficiency). The beauty of this concept lies in two elements: the first implication is that it is possible to base the positioning of a business on the personality of its leader. But, more importantly, a company's identity - which is more or less static - can be linked to the 'strategic modus operandi' of the life-cycle model, which is dynamic.

For example, if a company has competencies that fit the expansion phase, it would be advisable to choose a positioning that fits this growth mentality, even if the company is not actually in the growth phase of the life-cycle. By linking identity to the life-cycle model a paradigm arises that can be used as a design template for a company's distinctive positioning. Strategy then becomes the result of the alignment between the 'dynamic' business environment (relevance) and the 'static' identity/DNA (distinctiveness). After all, "others can copy what you do, but not who you are " (Van Eck, Willems and Leenhouts, 2008).

When transposing the Hermann Brain Model to the concept of organisational DNA, four quadrants can be derived from two axes as is illustrated in *Figure 3*. The horizontal axis is the appetite for risk versus the need for control. Some companies are more focused on creating and chasing opportunities and others more on bringing under control and managing their existing position in the market. The vertical axis is the tendency to rely on logical frameworks to support decision-making versus the tendency to rely on social context.

Figure 3: Four types of organisational DNA

This results in four quadrants, four colours of organisational 'DNA' that can be used as a blueprint for distinctive positioning with sustainability:

RED: breaking with 'business as usual' is what red companies are all about. Their tendency is to break out of traditional paradigms. These organisations are great in setting new standards and catalysing new developments. They act in a self-conscious manner, independent of others. Leaders of red companies are often visionaries. Culture is generally informal, with loose, principle-based procedures and a lot of delegated responsibility.

YELLOW: this type of organisation is growth–oriented and imaginative, and focusing on making things attractive for a larger public is what they are good at. Yellow companies are not seldom trendsetters. They have a great intuition for what is hip and how to turn new ideas into appealing concepts. They act in an upbeat, energetic way. Yellow leaders are often very inspiring and great performers. Their culture is generally very dynamic, with a flexible, market-oriented organisation and short communication lines.

GREEN: the green company is conservative by nature. It is a trusted and familiar source for its customers, and it is great at caring for and nurturing relationships. Green companies are risk-averse and dislike surprises. Their way of dealing with that is to build solid networks of relationships, with structures. A safe working environment and atmosphere is very important for green companies, as are clear rules and agreements. The 'servant-leader' is typical for this kind of organisation.

BLUE: a drive for quality is what distinguishes the blue company. They do not take anything at face value, 'measuring is knowing' could be their motto. These companies are often specialists, bringing a specific product or niche to perfection. Blue organisations tend to be highly structured and organised, reaching high levels of efficiency. The culture is serious and dedicated, within a highly formalised and predictive set of rules and procedures. Blue leaders are generally great planners.

4.   Scenarios for a sustainable tourism industry in 2040

In this study, foresight has been applied to sustainable tourism development in Europe by selecting a few experts from the European Tourism Futures Network of leading European knowledge institutions to participate in a Delphi study. The Delphi study comprised two rounds that focused on the following questions:

Round 1: What, in your opinion, are and will be, the most important drivers in the business environment that drive sustainable development of the tourism industry in the EU up to 2040 (these forces could be demographic, economic, social/cultural, technological, ecological, or political/institutional/legal). Give a concise description and explanation of why you consider it/them to be a driving force.

This round resulted in a list of driving forces of change that was used as input for the next round.

Round 2 : Select and rank the driving forces that are, according to you, the most uncertain regarding its outcome

or impact. Explain your answers.

In this round people were also asked to add to the descriptions of the drivers, if required.

The results of the second round gave insight into the levels of uncertainty of the various driving forces and the nature of these uncertainties.

After the data collection by means of the Delphi study was finished, the data were analysed by constructing a causal loop diagram of the driving forces that were identified. with the help of the descriptions and argumentations provided (Lindgren and Bandhold, 2009). The causal loop diagram provided an impression of how the driving forces are interconnected.

With the help of the causal loop diagram the authors have identified the two key uncertainties that, according to the experts, drive the sustainable development of the tourism industry up to 2040, together with the polar directions towards which these uncertainties could develop. This resulted in a matrix with two axes that frame four possible so-called environmental scenarios. A titel proposed by the researchers identifies the four scenarios as Back to the Seventies; Captured in Fear; Shoulders to the Wheel; and Unique in the World. Figure 3 shows the scenarios and the framework of axes and the polar directions of development. Based on the outcomes of the Delphi rounds and the causal loop diagram, the scenarios were elaborated on in a consistent description. These descriptions are given in *Table 1*.
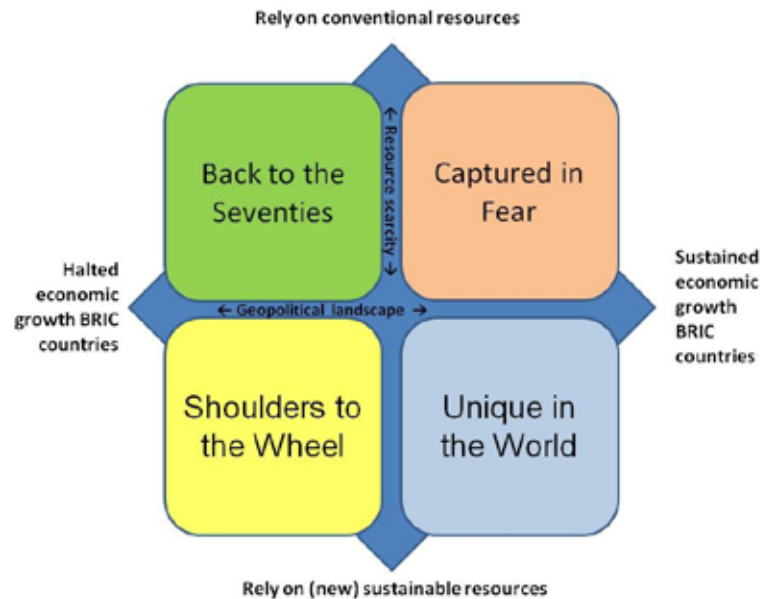

Figure 4. Environmental scenarios for a sustainable tourism industry in 2040.

Back to the Seventies

It is 2040. The European economy grows faster than in the emerging economies. This leads to a substantial increase in demand for energy. Time for the development of renewable resources is up and to be able to meet the vast growth of energy demand, there is a revival of the growth-paradigm, at the costs of sustainable thinking, both within the market and the public sector. There is general support to invest in the development of conventional resources such as shale gas. The environmental lobby is increasingly worried that the ecosystem will become irreparably damaged. The tourism industry believes that management of concentrated mass tourism is more durable than the old school of small scale localised tourism.

Captured in Fear

It is 2040. The EU economy has still not climbed out of the valley and, and as the economies of the BRIC countries and Northern Africa are booming, the economic disadvantage of Europe has only increased further. In order to protect the economy, the European Parliament has taken a protectionist stance, with the different EU countries following in its wake. This puts a brake on technological development, which not only disadvantages economic growth, but also prevents the development of technology for new resources and for the renewal of traditional resources. The ecosystem, therefore, is increasingly at risk. Also, socially, developments in Europe are not going smoothly: prosperity and welfare are threatened. To prevent the situation getting out of hand or even worse, the mass media are placed under control, which then hampers exchange of ideas, creativity and innovation in the tourism sector. Governments and oligopolists try to control the situation by means of a centralised management of resources.

Shoulders to the Wheel

It is 2040. Sooner than expected, the growth of the emerging economies has come to an end. Consequently, the relative economic power of Europe has increased, although the EU has not yet completely recovered from the consequences of the banking crisis of 2009. There is a clear revival of international trade and the Southern European countries benefit fully from it. Throughout Europe countries show an increase in wealth. The increasing competition on the world market makes the European tourism business inventive and co-operative, which gives an exponential boost to technological developments. The innovations aim mainly at stimulating sustainability. Putting all shoulders to the wheel is the general motto. The recession has resulted in the belief that sustainability is an important condition for further social and economic development.

Unique in the World

It is 2040. Economic growth in the BRIC countries and Northern Africa proceeds, slowly but surely, Europe recovers from the recession, although the economic disadvantage of Europe is final. Prosperity and welfare in Europe are on the rise again, which creates a positive mood. To give the domestic industry a boost the EU pursues a protectionist policy in conjunction with stimulating exports, which also benefits tourism. The notion prevails that Europe can excell and gain global competitive advantage by focusing completely on sustainable resources. Moreover, this would stop the degradation of and perhaps even restore the natural environment. The business world participates in the international agreements that are made in Europe with regard to sustainability. To stimulate national and regional production and consumption patterns, and to boost social, economic and environmental sustainability, decision-making is decentralised, but centrally coordinated (sharing economy). Small-scale tourism is seen as more durable than localised mass tourism.

Table 1. Scenarios in detail for a sustainable tourism industry in 2040

5.   Sustainability through the lens of businesses' DNA

We have proposed that competitive advantage is derived from maximising relevance and distinctiveness. Then we have formulated an approach to maximise the relevance of sustainability policies. With the introduction of organisational DNA we have provided a framework for maximising distinctiveness. Now it is time to explore how sustainability is approached through the lens of the different types of DNA.

Red DNA: going out-of-the-box

On the level of vision and strategy the RED company develops a broad perspective on how the market functions in relation to societal needs and challenges. RED conceives new approaches to how actors in its market segment can contribute to sustainability, thus confirming the visionary and progressive DNA of the company.

The implication is that RED prefers not to conform to the rules and procedures of others, but rather to compete with them. RED is not a great fan of externally imposed verification standards. It prefers to go its own, unique way, and expects the market to follow in the end. The advantage is that it can make quick progress, without the burden of aligning with others and having to agree on compromises. The disadvantage is that it can become detached from the same societal community it is trying to support and on which it depends.

In its communication about sustainability RED emphasises how the sustainable attributes of the product contribute to the progressive character of the product or company and how it can set a new standard for the future. The sustainable attributes of the product are interesting for its customers because they appeal to a sense of independence, of taking things into their own hands. RED always tries to keep the initiative. It explains why it does the things it does, but not in a defensive way. RED lets the customers discover that sustainability is something that can help them demonstrate their uniqueness.

Nike is a good example of a brand with lots of red DNA. Its sustainability policy clearly carries this DNA: Nike has its own 'Considered Design' philosophy, started an open-source innovation platform called GreenXchange, and in its communications describes how 'competition can propel humanity forward'.

In developing sustainability policies, RED companies ask themselves:

- *is the policy conceptual, pioneering and unconventional?*

- *does it show that sustainability can be achieved through vision, experimentation and courage?*

- *does the policy provide the freedom and autonomy that my organisation needs to be successful?*

Yellow DNA: turning problems into something positive

The YELLOW company formulates its mission as positive-idealistic. YELLOW wants to build bridges between the positive future it sees and the challenges that society is facing now. Its approach to sustainability is to find surprising and energising solutions, that turn a problem into an opportunity. In a way, that is proof of its optimistic and inspiring DNA. For YELLOW companies sustainability can be a way to make life and work more fun and more interesting.

An overly reductionist and grim approach of reality does not bode well with YELLOW. It prefers to go for original, refreshing solutions, that are built on a positive mindset than on hard facts and figures. For this reason, YELLOW generally is difficult to motivate for implementation of standardised systems and procedures, which they find boring. The advantage of this approach is that YELLOW tends to come up with creative and unexpected solutions that can downplay a problem without having to face its negative implications. The pitfall for YELLOW companies, however, is to take problems not seriously enough.

In its communication about sustainability YELLOW emphasises how the sustainable attributes of the product contribute to a more interesting and enjoyable life. YELLOW tends to downplay the negative side of sustainability, but will frame it in the context of a bright future full of potential. Communication about sustainability by YELLOW is never too technical, but focuses on emotions and experience.

Coca Cola is an example of a brand with substantial yellow DNA. A great example of the YELLOW approach is their 'Recycling King' campaign in Israel, where the company placed thousands of recycling bins in the country and turned (the otherwise boring act of) recycling into a game in which their fans happily participated. Another example is their recently released obesity campaign advertisement in which they try to show that people can live happily by engaging in sporting activities and that enjoying the positive Coca Cola lifestyle without health problems is perfectly possible (one might be tempted to think that Coca Cola has oversimplified the problem here).

In developing sustainability policies, YELLOW companies ask themselves:

- _is the policy creative, optimistic and open-hearted?_

- _does it show that sustainability can be achieved through enthusiasm, inspiration and optimism?_

- _does the policy provide the flexibility and dynamics that my organisation needs to be successful?_

Green DNA: caring together

The GREEN company is conscious of the responsibility it has to society. GREEN is not only a supplier to its customers, but also an employer, a buyer and a member of society at large. With regards to sustainability, GREEN on the one hand wants to relief its stakeholders and on the other it wants its stakeholders to also contribute their part. Therefore GREEN will take responsibility to bring everyone together and to broker common rules and agreements.

A GREEN company's approach to sustainability is not to compete, but to cooperate. To make sure that everybody is on board, conformity is important. Therefore, GREEN is a fan of broadly supported and implemented standards, which create a fair and level playing field. The advantage is that, since everybody is on board each time a step is made, it will have big impact. The disadvantage is that the process of reaching consensus can be complicated and slow, taking only small steps at a time.

In its communication about sustainability GREEN emphasises how the sustainable attributes of the product contribute to the relationship of the customer with the product, the company and/or their community/environment. It is important for GREEN to emphasise that this approach has already proven itself. Not by showing the plain facts or other overly rational proof, but by providing anecdotal context and social proof and by referring to common sense and conventional knowledge. Sustainability for the GREEN company's customer is a vehicle for connection, a sense of safety and belonging.

Fast-moving giant Unilever is a typical GREEN company. The GREEN approach to sustainability could not be more aptly summarised than by Unilever's slogan: "small steps, big difference". Unilever's approach to sustainability is to take the lead in involving everyone: organising industry roundtables, working with a host of NGOs and even demanding that their consumers do their bit.

In developing sustainability policies, GREEN companies ask themselves:

- *is the policy unburdening, responsible and connective?*

- *does it show that sustainability can be achieved through cooperation, formalisation and conformity?*

- *does the policy provide the stability and consensus that my organisation needs to be successful?*

Blue DNA: measuring is knowing

BLUE companies look at sustainability with a practical curiosity. They have a strong opinion on how things can be done better and always come up with thorough solutions. BLUE is a professional, whose tendency to always look for more efficient ways to organise things is very useful when addressing sustainability issues such as resource scarcity. For BLUE, sustainability provides a platform to demonstrate its outstanding technical and organisational skills.

BLUE likes to approach sustainability from the facts. It is sceptical about overly emotional or abstract ways to deal with sustainability challenges. It prefers to use solid, objectively proven methods and standards that have the official blessing of authorities and opinion leaders. The advantage of this approach is that BLUE will always bring existing sustainability efforts to a higher level of performance. The disadvantage is that its rational factual approach leaves little room for finding solutions outside the box.

In its communication about sustainability BLUE emphasises how the sustainable attributes of the product contribute to its quality (or to the quality of its production process). BLUE will not easily take a position on sustainability that is unsubstantiated by solid evidence. Factual communication is very important for BLUE, which always sees the facts, however the form in which information is presented, no matter how attractive. BLUE shows the customer that sustainability can be achieved through skill and intelligence.

Nespresso is a brand with significant blue DNA. Its AAA Sustainable Quality Program is built on the notion that poor farmers can never produce great quality coffee beans. And that's exactly what Nespresso is all about: striving for perfection and elegance. The communication, therefore, about their programme is focused on how making coffee farmers more professional simultaneously contributes to their well-being (their suppliers are paid around 25%-50% more than those supplying under Fair Trade conditions) and to why consumer buy the brand in the first place (high quality coffee).

In developing sustainability policies, BLUE companies ask themselves:

- *is the policy professional, practical and goal-oriented?*

- *does it show that sustainability can be achieved through efficiency, intelligence and dedication?*

- *does the policy provide the focus and structure that my organisation needs to be successful?*

6.   The strategic propositions

Each of the four DNA profiles can be used as a starting point for developing a distinctive positioning in connection with sustainability. The next step in the process was a meeting in Brussels with the entire European Tourism Futures Network, plus a few other experts. During the half-day workshop the attendees discussed the links between the scenarios and the four types of businesses, based on their organisational DNA.

Table 2 connects the four profiles of organisational DNA to the scenarios constructed on the basis of the Delphi study. By linking the scenarios to the DNA-profiles of tourism businesses it becomes clear which direction they have to take in order to make their company more sustainable. In this way, points were identified for the future that describe the key strategic guidelines for tourism businesses to achieve competitive advantage in relation to sustainable development. These points can be used as guidelines to develop a compelling, future-directed, company-specific vision to foster change to sustainability.

Scenarios 2040	DNA profiles of tourist businesses			
	Red (challenge, vision, change)	*Yellow (energy, optimism, growth)*	*Green (care, tradition, security)*	*Blue (quality, professionalism, efficiency)*
1. Back to the seventies	Recreate the past Contrarian, niche innovation Highly futuristic "Welcome to the future" **Sustainability as design principle**	Carefree lifestyle is possible Social innovation Communities for sustainability "Don't worry be happy" **Sustainability as entertainment**	Appeal to nostalgia Conventional technologies Scalable alliances "Timeless hospitality" **Sustainability as duty**	Optimise and scale Mastering technology Improve existing methods "Still no. 1 in quality" **Sustainability as craftsmanship**
2. Captured in fear	Limitations don't apply Redefining value Turn restrictions into benefits "Yes, we can!" **Sustainability as a quest**	Opportunity for growth Reframing value Connection and imagination "Recreate yourself!" **Sustainability as inspiration**	Sense of safety Shaping the establishment Systems and procedures "Sharing is caring" **Sustainability as security**	Leave it to the professionals Best in class Optimising standards "Best choice available" **Sustainability as perfection**
3. Unique in the world	Opportunity for distinction Innovation by experimentation Decentralised systems design "Stay curious" **Sustainability as progress**	Unity through diversity Values based innovation Local branded experience "Join the movement" **Sustainability as bonding**	Creating trust Innovation through cooperation Local diplomacy "The real local experience" **Sustainability as authenticity**	Serious business New look at old technology Rethinking traditional methods "Local experience, global quality" **Sustainability as quality**
4. Shoulders to the wheel	Exploring frontiers Multiple innovation tracks Maximum agility "Uncover the best" **Sustainability as adventure**	Shaping reality Design innovation Original and appealing concepts "Uncover discovery" **Sustainability as trendiness**	Protecting the good Change to not have to change New tech, old infrastructure "Small steps, big difference" **Sustainability as conservation**	Picking the winners Evaluating novelties Building authority "x% reduction in y" **Sustainability as science**

Table 2. Future points for achieving competitive advantage in relation to sustainability, for four DNA-profiles within the context of four scenarios for a sustainable tourism industry in 2040

7.   Conclusions

In this manifesto we present four scenarios for a sustainable European tourism industry in 2040. By linking the scenarios to four distinct types of organisational DNA for each of these types of organisations, concrete strategic propositions were formulated. This approach is unique as it offers a holistic approach that goes beyond contemporary sustainable business practices and integrates social, environmental and economic values.

Achieving a sustainable European tourism industry in 2040 does not stop here. Contemporary insights in knowledge production (e.g. Adaptive Organisational Learning) require that tourism organisations, individual businesses and all other stakeholders to be involved in further discussion; they will need to further elaborate the scenarios and their implications as well as the strategic answers specifically required for their type of DNA.

The European Tourism Futures Institute and its partners in the Tourism Futures Research Network have identified such a holistic approach to sustainable business models as key for the future competitiveness of Tourism in Europe. As knowledge institutes, it will be our responsibility to feed this discussion with insight into future developments and their impact on our industry. With the ideas and scenarios depicted in these pages, and with the future role we hope we may have for tourist destinations and business, it is our intention to contribute to positioning sustainability as a crucial element for business strategies which will foster economic, social and environmental value-creation.

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Authors:

Dr. Albert Postma, Professor of Scenario Planning at European Tourism Futures Institute, School of Leisure and Tourism, Stenden University of Applied Sciences

Dr. Elena Cavagnaro, Professor of Service Studies at Academy of International Hospitality Research, Hotel Management School, Stenden University of Applied Sciences

Ernesto Spruyt, MA, Co-founder and Chief of Growth, Mobbr Crowd Payments

Participants in the Delphi research:

Elena Cavagnaro; Stenden University o.A.S., Netherlands

Frederique Dimanche; Skema Business School, France

Hanny Kadijk; Stenden University o.A.S., Netherlands

Jeroen Oskam; European Tourism Futures Institute.

Albert Postma; European Tourism Futures Institute.

Ernesto Spruyt; Mobbr Crowd Payments, Netherlands

Simona Staffieri; Sapienza Università di Roma, Italy

Participants Futures' workshop Brussels:

Carlos Brebbia; TTVAM, International School of Law and Business, Lithuania

Dieter Brinkmann; Bremen University o.A.S., Germany

Evangelos Christou; Alexander Institute of Technology Thessaloniki, Greece

Elena Cavagnaro; Stenden University o.A.S., The Netherlands

Falco de Klerk Wolters; Stenden University o.A.S., The Netherlands

Nicole Ferdinand; Bournemouth University, United Kingdom

Karen Fokkers; European Tourism Futures Institute, The Netherlands

Eric Horster; Institute for Management and Tourism, Germany

Katherine King; Bournemouth University, United Kingdom

Madeleine Keup; Skema Business School, France

Graciëlla Karijomedjo; European Tourism Futures Institute, The Netherlands

Kaija Lindroth; Haaga Helia University o.A.S., Finland

Júlio Mendes; Universidade do Algarve, Portugal

Vincenzo Nocifora; Università la Sapienza Roma, Italy

Irem Önder; Modul Private University Vienna, Austria

Jeroen Oskam; European Tourism Futures Institute, The Netherlands

Albert Postma; European Tourism Futures Institute, The Netherlands

Marco Robledo; Universitat de les Illes Balears, Spain

Dirk Schmuecker; NIT Kiel, Germany

Anders Steene; Södertörn University, Sweden

Sabrina Seeler; Institute for Management and Tourism, Germany

Aija van der Steen; University of Latvia, Latvia

Anne Klaas Schilder; European Tourism Futures Institute, The Netherlands

Gaby Seemann; European Tourism Futures Institute, The Netherlands

Ernesto Spruyt; Mobbr Crowd Payments

Craig Webster; University of Nicosia, Cyprus

Joyce Walstra; Stenden University o.A.S., The Netherlands

Jan Ybema; Hiswa, The Netherlands

Ian Yeoman; European Tourism Futures Institute, The Netherlands

European Tourism Futures Institute

Visiting address:	Rengerslaan 8, 8917 DD, Leeuwarden
Postal address:	P.O. Box 1298, 8900 CG, Leeuwarden
Phone number:	+31 (0) 58 244 1992
Email:	info@etfi.eu
Website:	www.etfi.eu