



Lapin Matkailuelinkeinon Liitto / Finnish Lapland Tourist Board Ry

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# POST-COVID-19 SCENARIOS FOR LAPLAND TOURISM



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## Summary of the project

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# INTRODUCTION

## Foundations of the project

The year 2020 quickly proved to be exceptional as COVID-19-pandemic closed societies and restricted free movement. Tourism and service industries in particular have suffered from the crisis.

With the help of scenario work, various future images of Lapland's tourism and paths out of the COVID-19 crisis have been outlined. What do the "new normals" look like? What will remain the same, has something changed permanently?

The scenarios serve as a tool in the development of the entire tourism industry ecosystem, as well as provide support for individual companies to navigate in the post-pandemic world.

### WHY SCENARIOWORK?

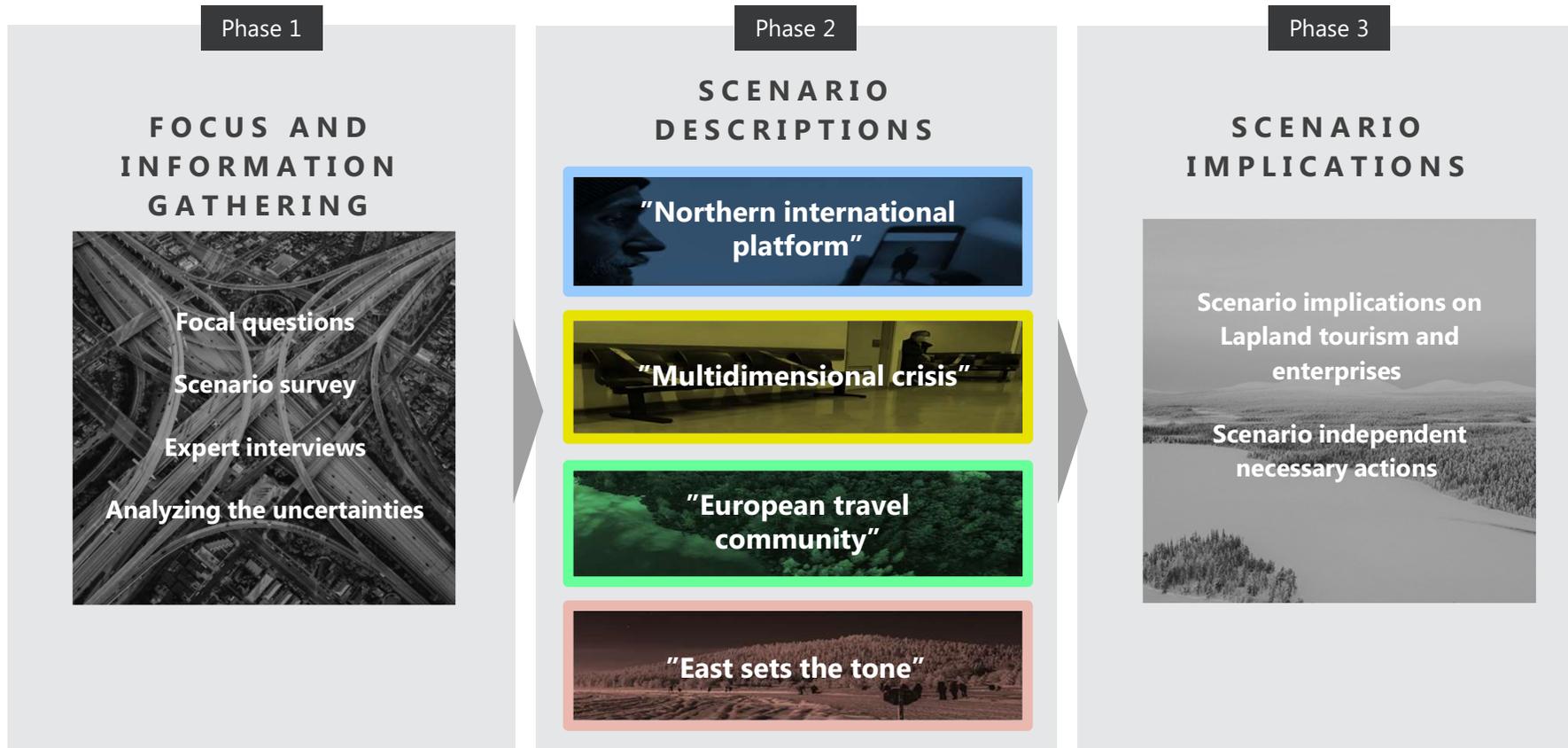
Scenarios offer a meaningful way to approach the uncertainties in the operating environment of Lapland's tourism in a situation where radical changes in the present affect future developments. In the light of the new situation brought about by the COVID-19 crisis, the project identified which operating environment development paths have strengthened as a result of the crisis and which in turn have subsided. The aim of the scenario work was to challenge the current ways of thinking of key people and stakeholders and to create scenarios with different views on the development of the Lapland tourism operating environment.

On the basis of the scenarios, the project has identified necessary measures that tourism operators should take regardless of which scenario materializes in the future. In addition to the necessary measures independent of the scenarios, a contingency plan has been created for the realization of each scenario, which gives direction to what the actors should emphasize if the world becomes similar to a certain scenario.

In connection with the project, we conducted a stakeholder survey and two stakeholder workshops. We warmly thank the organizations and parties who shared their views at various stages of the process for their expertise and cooperation. The scenario work has been done in the Post-Covid-19 scenarios for Lapland tourism-project implemented by Finnish Lapland Tourist Board ry, which has received ERDF funding from the Regional Council of Lapland.

We hope that our work will be useful in the future reflections of all organizations!

# SCENARIO PROCESS





**FOUR ALTERNATIVE SCENARIOS**

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## SCENARIO 1

# MULTIDIMENSIONAL CRISIS

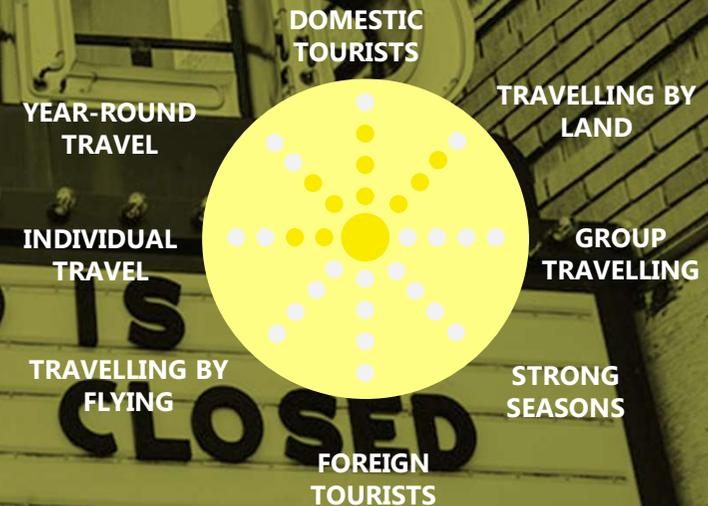
The COVID-19 pandemic goes on for several years and societies face strong waves of the virus. Weak economic development, rising unemployment, a collapse in consumers' purchasing power and a fiscal crisis have marked the debate for several years. The economic situation of municipalities has gotten worse and public services are reduced.

As the corona situation remains unstable, travel restrictions will weaken international tourism for several years. Several bankruptcies are seen in the tourism sector and the sector is no longer seen as an attractive place to work or study. The tour operator field is narrowing as the financially strongest players buy smaller competitors suffering from cash crisis.

Health security has remained as a permanent part of tourism and corona tests will be carried out well into the future. The plight of public transport continues when consumers choose private cars. The crisis has pushed airlines into deep financial problems, yet states support their own airlines, although the number of flights is declining.

Volatility in pandemic restrictions makes it difficult for the restaurant and service sector to operate. Consumers buy trips through traditional sales channels, with an emphasis on familiarity and safety in purchasing behavior.

Domestic tourism has remained a permanent trend due to restrictions in international travel. Finns find their way to Lapland not only for holidays, but also to work remotely.



## SCENARIO 2

# EAST SETS THE TONE



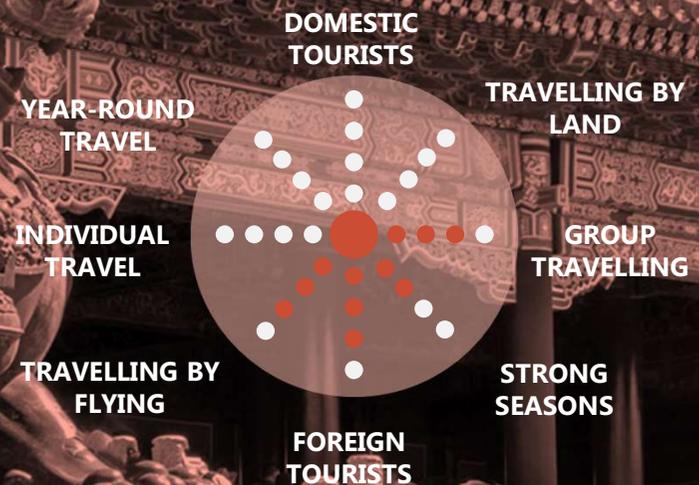
The world is recovering from the COVID-19 crisis, driven by Asia and China in particular. China takes a lead in vaccination delivery and the country's international weight is growing. Europe and the United States are lagging behind in the economic recovery, and Chinese capital is flowing to Europe.

In the travel industry, airlines end up in Chinese ownership. Finland finds itself balancing between the West and the East: does it choose solidarity with the EU or the growth opportunities offered by Asia?

Chinese investment in Lapland's tourism is increasing and some hotels are transferred to Chinese ownership, that often employ Chinese workforce. Majority of tourism revenue is threatening to flow to Asia through large tour operators. More flight connections are launched between Lapland and Asian destinations, and Finnair expands its Eastern strategy as the purchasing power of Asian consumers strengthens international tourism.

Asian tourist is looking for nature peace, exoticism and experiences in Lapland. Demand for program services is growing. The winter season is the most popular, but summer tourism is also increasing.

Nature and biodiversity of Lapland threatens to be strained by the exponential growth of Asian tourism. Social issues also arise due to insufficient labor conditions.



## SCENARIO 3 EUROPEAN TRAVEL COMMUNITY

European integration is deepening in unstable global politics. The pandemic has been brought under control and common travel restrictions have eased the tourism industry over the worst of the crisis.

The EU's ambitious climate goals are advancing as more and more concrete signs of climate change are seen. The European Climate Fund is driving development and consumer values emphasize sustainability.

Domestic economic growth is unevenly distributed and consumer purchasing power is polarized. The labor market is developing in a more flexible direction, which facilitates the availability of labor in Lapland.

Flexibility and responsibility are emphasized in tourism. Guided by environmental awareness, Finns choose domestic package tours instead of a foreign flight. Tourists are flowing to Lapland, especially from Europe. Prompt bookings and clear cancellation conditions are becoming the new norm in tourism. The seasons are mixed and travelling takes place whenever the pandemic situation allows.

Signs of snowless winters are starting to show and weather conditions are becoming unstable. The summer heat in southern and central Europe is getting worse.

Demand for virtual tourism has increased. Services are being developed especially for Asian tourists.



## SCENARIO 4

# NORTHERN INTERNATIONAL PLATFORM



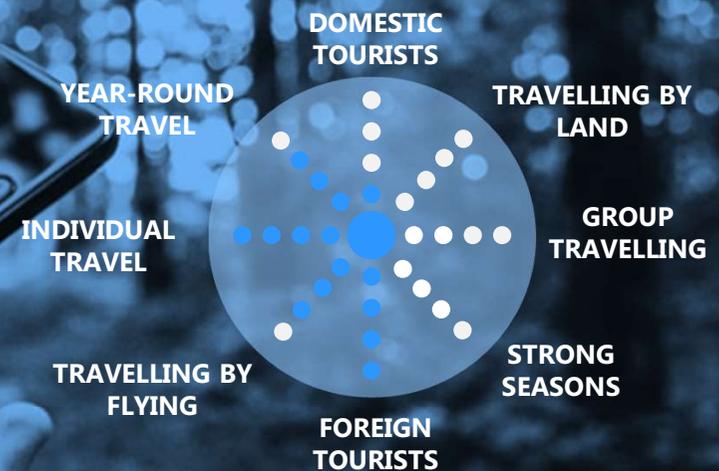
The corona pandemic has been resolved through international cooperation. The economy is recovering, and labor migration is increasing, including in Lapland.

International tourism is recovering, and the destinations of the North are of interest due to nature and uniqueness. The amount of year-round tourism in Lapland is growing, although Finns prefer to travel abroad when corona restrictions remain in history.

Large international platform players connect small companies to their own platforms and significantly increase their role in the tourism industry. Lapland has to compete on platforms with other travel destinations. The power to direct the customer flow is moving further and further away from the control of tourism operators in Lapland.

Individual trends are emphasized in tourism trends, and tourists compile their own unique journey from a selection of different service providers themselves, utilizing global digital platforms, with social media influencing purchasing decisions. The experience of stopping is also sought from tourism.

Lapland's infrastructure is developing towards a Central European-style logistics network, which enables more individual travel routes for tourists. International tourists arrive at various destinations along their own routes. Air traffic has recovered since the corona pandemic.





**POST-COVID-19 ROADMAP FOR LAPLAND  
TOURISM**

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COMPANY LEVEL

**Maintaining safe travel practices and innovating new solutions:** Compliance with international and national corona recommendations, hygiene practices and safety intervals. Turning health and safety into a competitive factor (Finland's reputation in managing the pandemic).

**Securing the winter season 2020-2021:** As travel restrictions continue, the role of domestic tourism will be emphasized. Increasing amount of package tours, various campaigns to influence the views of domestic tourists (different price categories) and increasing opportunities for distance work and study.

**Building the winter seasons 2021-2023 towards the "normal":** A return to old customer amount but with new innovations. Developing tourism together with stakeholders (e.g. what kind of tourism is desired in the region? What does the area benefit from tourism?)

**Year-round development:** New types of products and services, target group identification and pricing strategies to boost year-round travel. Consolidation of domestic summer tourism. Product development for new target groups, considering snowless time (creating resilience).

**Consideration of different customer profiles:** Increasing the knowledge of language and culture, different pricing models, differences between seasons.

2020

2022

2025

LAPLAND - LEVEL

**Supporting businesses in the acute crisis:** Advising on financial arrangements, supporting livelihoods - "let no one fall". Health security measures and lobbying on travel restrictions, legislative reforms and funding for tourism

**Development of transport connections:** Restoration of air transport capacity, agile increase of train services. Design of Lapland's logistics network (incl. Sweden connection).

**Improving Lapland's competitive position:** Development of information availability and information management. Through Visit Finland, targeting measures to Lapland's recovery. Strengthening the negotiating position vis-à-vis international actors. Influencing the competitive situation within the country

**Taking Nordic co-operation to next level:** Joint lobbying and infrastructure development. Synergies in international marketing and promotion of ringroute concepts.

**Continuation of the long-term development work of Lapland's business life, employment and education:** Retention of the labor force, traction and holding factors and increasing the entrepreneurial spirit. Targeting and developing education, multi-stakeholder cooperation and building career paths in tourism - meeting the need for skills. The broadband connection supports year-round remote work.

**Ensuring the availability of labor:** Utilizing opportunities for distance learning for students, for example by providing accommodation and remote exam opportunities. International experts to be encouraged to stay in Lapland despite the difficult winter season.

**Unifying lobbying work and marketing:** Clearer division of responsibilities and agile response to changing situations. National and international advocacy, ensuring that the voice of Lapland heard. Determining a common intent for international growth and investment needs.

**Focus on sustainability:** Anticipating change in consumer behavior ("you learn from the corona to the climate crisis"). Focusing on the sustainability goals of tour operators. Sustainability is a competitive advantage for Lapland with the measures already taken. Combining sustainability and digitalization (eg smart distance carbon footprint measurement).

**Developing accessibility outside group travel:** Supporting individual travelers with various logistical solutions and individual services (so-called "self-service tourism"). Development of travel chains.

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