

# Creative Destinations in a Changing World

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# Futures for Tourism

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# Rationale / Question / Structure

- Rationale

- We sleep walked into the economic crisis
- Sort of new something was wrong – but chose to ignore it

- Question

- Focus on a changing world
- Consider a range of futures
- Posing the question what these will mean for creative destinations

- Structure

- The “problem of the **present**”
- Looking at the **past**
- Four **future** scenarios
- Plus a fifth point of discussion

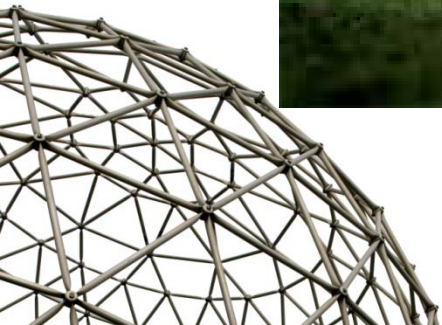


# The problem of the present

- Presentism
- News fixation (short term)
- Short termism (the economic crisis)
- In the thick of it
- Taken for granted
- Path dependency
- Reproduction



# Carbon Dependency: Ho-Yeol Ryu *Airport* 2005



# A quick look at the past: 1985

- January 1 - The first British mobile phone call is made
- May 17- United Airlines Pilots go on strike for 29 days.
- June 14 - TWA Flight 847 is hijacked by Hezbollah
- November 20 - Microsoft Corporation releases the first version of Windows, Windows 1.0
- Looking forward from 1985 we would have certainly failed to predict the arrival or impact of the internet, Al Quaida, or CO2. Or the huge democratisation of air travel Or the fact that every school kid has a mobile phone. So beware attempts to predict the tourism industry of the future, ... but ...



# Four Future Scenarios

# Tourism 2023

Four scenarios,  
a vision and a strategy  
for UK outbound  
travel and tourism

# How were the scenarios created?



- Founding Partners (see previous slide)
- Steering and Advisory committees
- Two industry workshops helped to answer the questions:
  - what are the most important trends in shaping the future of the industry
  - how predictable are those trends?
- Over 100 stakeholders consulted on the future shape of the UK outbound tourism industry



# The Scenarios



# 1. boom and burst

Overseas travel is attractive and easy



# 1. boom and burst

- **Quick recovery from recession**, booming economy, high disposable incomes
- Growth of **BRIC** economies
- **Globalised world** with more visitors and more destinations
- Rapid **advances in technology** e.g. breakthrough in algae-based fuels.
- **Other sectors make carbon cuts** to allow growth in tourism
- **Over-crowding** a serious problem in airports / destinations / key attractions
- Pressures on **Wilderness** areas
- Urgent quest for **new** destinations

## 1. boom and burst

Mount Everest saturated

Timed ticketing for Venice visits

Airports the new coach stations – squalid / crowded


Direct rail Birmingham-Barcelona

## 2. divided disquiet

A troubled world makes overseas travel less attractive

## 2. divided disquiet

- A **less globalised world** of protectionism and mistrust
- **Closed borders.** Accidents. Pandemics. Warfare. Corruption and terrorism.
- Assymetries of world order
- Ideological wars
- Easy, cheap and safe travel era **over**
- **Destinations affected** struggle to attract visitors
- Others **struggle to accommodate huge volumes** of new tourists
- Travel **cumbersome** and time-consuming
- **'Virtual presence'** technology replacing some travel

A close-up photograph of a person's hand holding a smartphone. The phone's screen is dark red and displays a text message in yellow font. The background is a plain, light-colored surface.

Dear Mum,  
I'm sorry I bothered coming  
here – three hours queuing to  
get through security, and then  
there's a power failure at the  
hotel! I tried to visit the  
Pyramids, but there were too  
many people to see much  
from the observation platform,  
the temperature is just stifling  
and the entry fee has shot up!  
Tell Auntie Anne not to bother  
coming and get online to  
catch up with Uncle Tim  
instead. Better go, I've got to  
queue for water again,  
Love,  
DAVID

## 2. divided disquiet

Mayor declares  
'end of tourism'  
(safety / security)

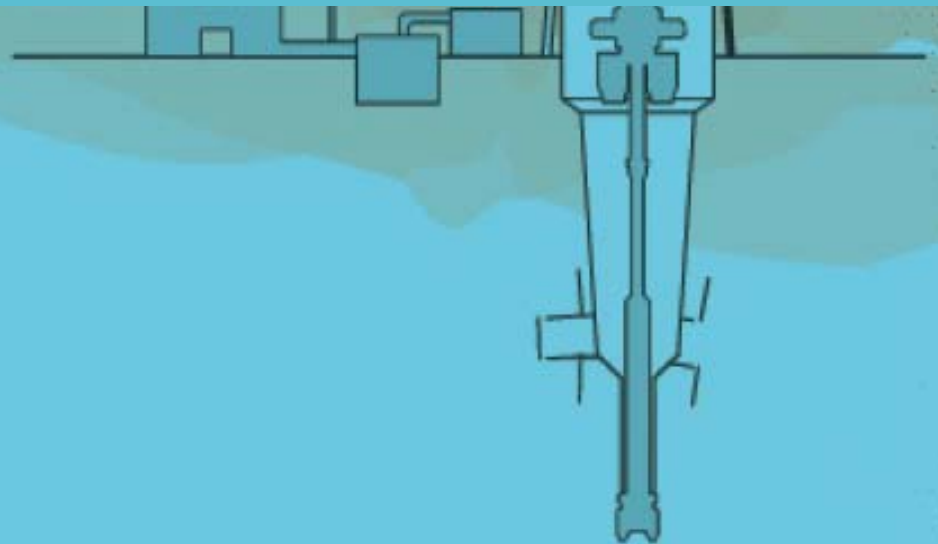
'Virtual windows'  
unite families

Disruptions are  
the norm. Travel  
unpleasant

Water levies in  
drought zones

### 3. price and privilege

Cost constraints lead to industry restructure



### 3. price and privilege

- High demand leads to era of **oil-price super-spikes**
- **UK economy struggling**. Disposable incomes down, costs of food and energy have risen. Debt is more expensive.
- Cheap, mass air travel **a thing of the past**
- People travel overland or save up for years for **'once in a lifetime'** holiday
- **Low margins**, poor wages and conditions
- **Fewer economic benefits** for most destinations
- Wealthy **minority** fly regularly
- **'Right to fly'** political movement
- **Drive for efficiency** – often the same as 'low carbon'

### 3. price and privilege

“Absolutely no  
frills” airlines:  
Everything extra

Passengers pay  
by weight

Holiday credit  
schemes boom

Spain converts  
hotels into nursing  
homes

# The SkyRider Concept

- Called the SkyRider, the new-style seat is set at an angle with no more than 23 inches between a passenger's seat and the one in front.
- Passengers would likely pay lower fares, but airlines could boost their profits because the narrowly spaced seats would allow them to squeeze more on board.



## 4. carbon clampdown

Demand for overseas travel down as ethical issues to the fore

## 4. carbon clampdown

- Ambitious new **carbon regime**; public support high
- Individual **carbon allowances**
- **New technology failed** to deliver low carbon travel - ticket prices expensive.
- Less travel abroad; **over-capacity** in outbound sector.
- British operators focus on **domestic tourism** or global business
- **Holidays are longer**; many looking for experiences and ethical components.

## 4. carbon clampdown

Stansted  
converted into  
retail park

Motorway lanes  
reserved for  
electric cars

UK seaside is  
fashionable -  
Staycations

Airships make a  
comeback

29 May 2023

Dear Mum,

I've finally reached the project in Lithuania and I'm really glad I spent the carbon allowance getting here. It's been really fulfilling work with the families and I've learnt more from them than they ever could from me!

Did you say you came here once on a Hen Weekend? It seems funny you could just hop on a plane like that.

I'm sorry you're not able to come and see it today but maybe we can fix a trip to Cornwall for the year after next?

Lots and lots of love, David



# EUROCONTROL Long-Term

## Forecast of air traffic in Europe to 2030



- Uses four similar scenarios
  - Scenario A: Global Growth: Strong economic growth in an increasingly globalised economy, with technology used successfully to mitigate the effects of challenges such as the environment and security.
  - Scenario B: Business as Usual: Moderate economic growth and little change from the status quo, that is, trends continue as currently observed.
  - Scenario C: Regulation & Growth: Moderate economic growth, but with stronger regulation to address growing environmental challenges for aviation and for Europe more generally.
  - Scenario D: Fragmenting World: A World with increasing tensions between regions, with knock-on effects of weaker economies, reduced trade and less longhaul travel.



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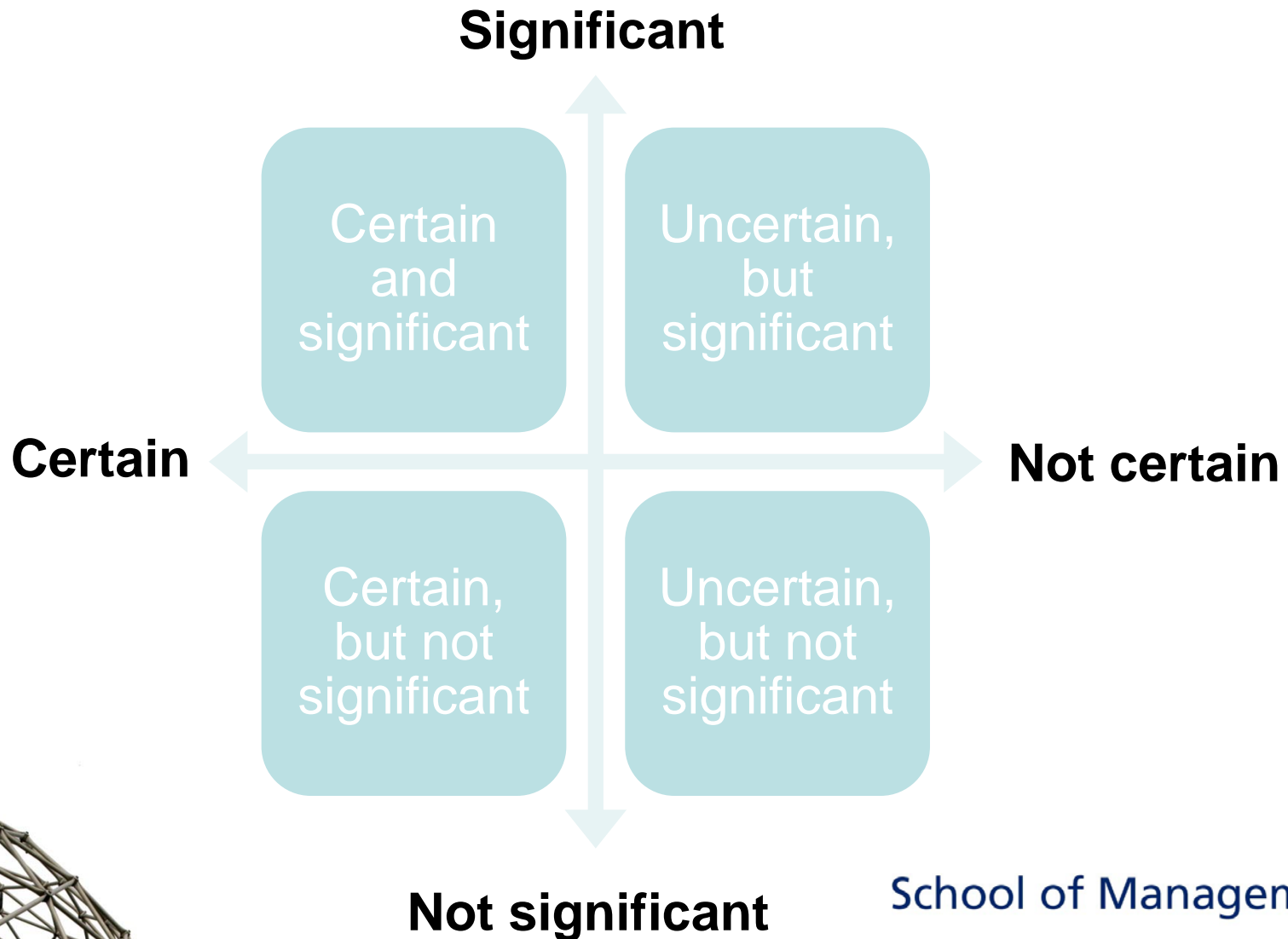
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# EUROCONTROL Long-Term Forecast of air traffic in Europe to 2030



	IFR Movements(000s)						Average Annual Growth						AAGR 2030/ 2007	Traffic Multiple 2030/ 2007
	2006	2007	2014	2020	2025	2030	2006	2007	2014	2020/ 2015	2025/ 2021	2030/ 2026		
A: Global Growth	.	.	14,119	17,532	19,890	22,086	.	.	5.2%	3.8%	2.6%	2.1%	3.5%	2.2
B: Business as Usual	.	.	12,930	15,553	17,763	19,549	.	.	3.9%	3.1%	2.7%	1.9%	3.0%	2.0
C: Regulation & Growth	9,439	9,916	12,930	14,955	16,724	18,170	3.9%	5.1%	3.9%	2.5%	2.3%	1.7%	2.7%	1.8
D: Fragmenting World	.	.	11,773	13,460	15,062	16,507	.	.	2.5%	2.2%	2.3%	1.8%	2.2%	1.7





# Certain about...

- Climate Change
- Drought and water scarcity
- Potential growth in visitor numbers
- Cost of resources
- Ageing UK population
- Political instability, regional conflict and terrorism



# Less certain about...

- The way people view mobility and the environment
- The extent and effect of legislation
- How expensive energy might be
- How strong the economy will be
- Will new technologies be successful?
- How active will older people be?
- How will the new global economies develop?



# From passive to active

- Four scenarios that might happen
- But what scenario would we wish to conjure up?
- A very under asked question ...



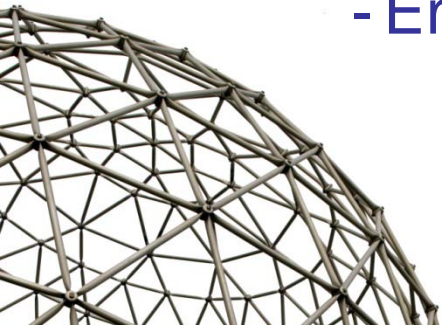
# Fifth Scenario

- What is our vision of a tourism Utopia?



# Model A: GNP based success Factors

- At a micro level:
  - Customers (numbers)
  - Customers (satisfaction)
  - Profit (Service)
- At a macro level
  - Tourist arrivals
  - Expenditure
  - Foreign Currency Earnings
  - Employment



# Model B: Carbon Friendly GNP

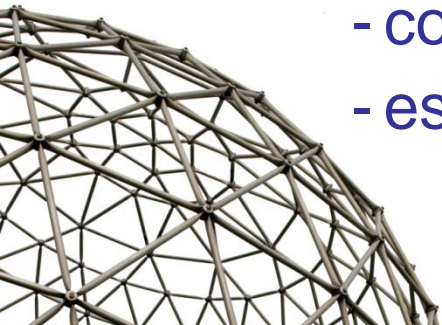


- GNP but with low carbon policies – but low carbon should not be an end!



# Model C: GNH based success Factors

- GNH: Gross National Happiness
- Defines quality of life in more holistic and psychological terms than Gross National Product. (King Jigme Singye Wangchuck of Bhutan)
- Commitment to advance Bhutan's culture based on Buddhist spiritual values.
- The four pillars of GNH are
  - the promotion of equitable and sustainable socio-economic development
  - preservation and promotion of cultural values
  - conservation of the natural environment
  - establishment of good governance.



# Need for change in thinking

- From

- GNP
- Growth
- Private Benefit
- Short term
- Local
- High Carbon
- Functional values
- Mindless development
- Path dependent destinations in a static world

- To

- GNW
- Sustainable growth
- Social benefit
- Long term
- Planet
- Low Carbon
- Aesthetic values
- Mindful development
- Creative destinations in a changing world

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# Concluding Thought

- Will we avoid a possible crises in tourism?
- Just like the financial boom, the tourism boom suits us
- Easy to ignore it
- The everyday taken for granted hide any problems



# Futures for Tourism

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The End ...

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...With thanks to...



<http://www.forumforthefuture.org>



The **co-operative** travel



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