

Tourism 2023

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

Forum for the Future – the not-for-profit sustainable development organisation – works in partnership with more than 120 leading companies and public sector organisations, helping them devise more sustainable strategies and deliver these in the form of new products and services.

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Tourism 2023 forms part of the Forum's ambitious programme of work on sustainable tourism and travel.

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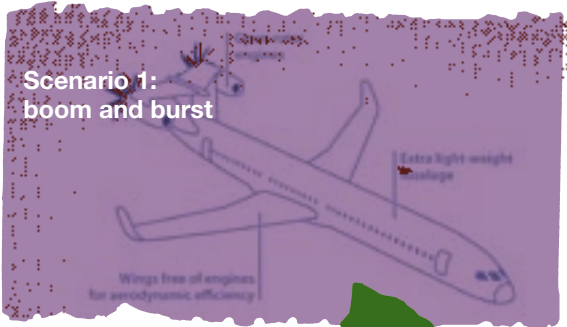
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**Scenario 1:
boom and burst**



**Scenario 2:
divided disquiet**



**Scenario 3:
price and privilege**



**Scenario 4:
carbon clampdown**



To download animations of the scenarios go to: www.forumforthefuture.org/projects/tourism-2023

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1. executive summary

“Climate change will have dramatic impacts on how, where and when (and even if) people travel, and will reshape the industry over time.”

turbulent times

Change is the law of life. And those who look only to the past or present are certain to miss the future.

John F. Kennedy

Since we began working on *Tourism 2023*, there have been some breathtaking changes which have had a dramatic impact on the travel and tourism industry worldwide. The speed at which the credit crunch morphed into a global recession, combined with fluctuating oil prices, caught many in the industry on the back foot. Regular news headlines about the failure of travel companies have been a grim reminder of the commercial imperative of being fully prepared for the future.

And the pace of change looks set to accelerate. Our world is becoming crowded and our available resources scarce. By the mid-2020s, the UN expects the world population to grow to 8 billion. That's an additional 1.3 billion people, who will place dramatic new demands on the planet. By 2025, 1.8 billion people are expected to be living in countries or regions with absolute water scarcity.¹ The growth of the middle classes in countries like China and India has the potential to reshape global tourism flows dramatically. “Climate change will also have dramatic impacts on how, where and when (and even if) people travel, and will reshape the industry over time.”

But is the travel and tourism industry ready for these changes? A report by KPMG released in April 2008, just a month before we began work on *Tourism 2023*, suggested not. It ranked transport and tourism as the sectors least well prepared for climate change and among those most commercially exposed to the physical risks it presents.² What's worrying is that these are the changes we can be fairly certain about. What about the things that we are less certain about, but that are really important for the future of the industry? Things like how legislation might shape travel and how active our ageing populations might be? The industry needs to be prepared for uncertain times if it is to prosper.

Tourism 2023 tackles these questions head on in order to help the UK outbound travel and tourism industry better understand and plan for its future. The project, coordinated by the sustainable development charity Forum for the Future and supported by some of the foremost organisations in the industry, presents a set of four scenarios which explore the critical uncertainties facing the industry and offers vivid images of possible futures.

The founding partners – ABTA, British Airways, Carnival UK, The Co-operative Travel, The Travel Foundation, Thomas Cook and TUI Travel, with support from Defra – have responded to these scenarios by signing up to a shared vision of a sustainable outbound tourism industry and have committed to work to achieve this.

¹ Food and Agricultural Organization, United Nations, 14 February 2007

² Climate Changes Your Business, KPMG, 2 April 2008

a vision and strategy for the industry

Tourism 2023 is not just about understanding what the future might hold, it is also about shaping it.

The scenarios explore very different directions in which the industry may develop. They show us that companies can create a better commercial future for themselves by thinking through the wider impacts of their services and taking a sustainable approach. To get to the future you want, it's important to know what it looks like and what you're aiming for – to have a vision.

Tourism 2023 sets out a clear vision of a profitable, successful future in which the travel and tourism industry recognises its wider responsibilities to society. The founding partners are committed to a sustainable future and have signed up to this shared vision.

Signatories to the *Tourism 2023 Vision* are committing to integrate the vision into their business strategies and to working together to deliver innovative solutions to the challenges ahead.

Following the publication of this report the next phase will be to engage with the wider industry. The founding partners, Forum for the Future, ABTA and The Travel Foundation, with the support of Government, are now working together to develop the framework to engage the wider industry and to deliver the *Tourism 2023 Vision*.

This is the first collaboratively developed vision for a sustainable UK outbound travel and tourism industry. The industry as a whole must now take ownership of this vision, and ABTA together with The Travel Foundation will be working with the founding partners to facilitate this.

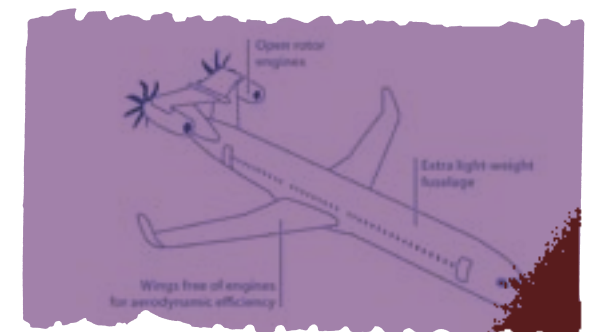
“Signatories to the Tourism 2023 Vision are committing to integrate the vision into their business strategies and to working together to deliver innovative solutions to the challenges ahead.”

tourism 2023 – a collaborative project

The *Tourism 2023* scenarios, vision and strategic approach outlined in this report were developed over eighteen months of research and consultation, which included desk research, expert interviews and a series of four industry workshops. The *Tourism 2023* Advisory Board and Steering Committee has guided the project's development.

More than 100 individuals with expertise in different facets of the travel and tourism industry have contributed their knowledge and insights into this project, including travel and tourism academics, business leaders, campaigners, legislators and commentators.

Join us on this journey to put sustainability at the heart of our industry. With strong leadership and commitment we can help shape the future we want – a thriving outbound travel and tourism industry that is both profitable and sustainable.



the Tourism 2023 summary vision statement

We believe in the benefits of travel and tourism. Our industry opens up the world, connects lives and delivers holiday experiences that bring happiness to millions.

But the future is likely to be dramatically different from today. We have explored a range of scenarios, which show that there are some major risks to the holiday experience and the way we currently operate. These radical changes in our external operating environment give us an urgent commercial imperative to evolve and reshape our businesses.

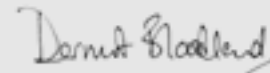
As an industry, we want to lead the way towards a better future – for our own success and for wider society, with sustainable tourism as part of a sustainable society. We have set out what we think that looks like in our vision. It recognises our responsibilities to our environment – the finite natural resources upon which we all rely; our staff and our customers; and to our communities – the lives of all those touched by our industry.

That's why we are committed to ensuring a net positive impact – creating more 'good' than harm – for our industry by 2023.

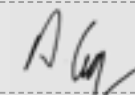
We have set ourselves six principles to create a sustainable future.

1. **Our environment** is protected, not eroded, by our operations. We take every opportunity to enhance it.
2. **Our employees** are given opportunities to develop to their full potential.
3. **Our customers** are provided with mainstream sustainable products as the norm.
4. **Communities we work in and with** benefit from our operations.
5. We strive to be sustainable in **our infrastructure** through innovation.
6. **Our business value** incorporates social and environmental costs so that we can ensure sustainable profits (financially, but socially and environmentally too).

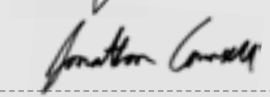
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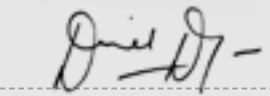
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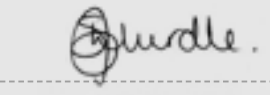
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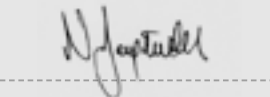
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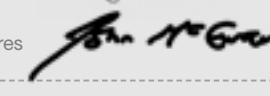
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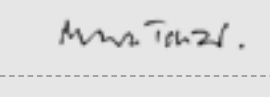
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The full *Tourism 2023 Vision* can be viewed in section 9 of this report. It sets out our broad ambitions for the sustainable industry we want to achieve within 15 years.

get involved

Join the leading businesses that have made a commitment to secure a long-term future for the industry. To become a signatory to the *Tourism 2023 Vision* contact: tourism@forumforthefuture.org

the workstreams and benefits of them

Tourism 2023 has identified three specific areas where urgent action is required, where more can be achieved by working together than by any one organisation in isolation. All work programmes are designed to support, complement and build on existing initiatives.

1. Sustainable destinations

The industry needs to demonstrate and monitor the economic benefit tourism delivers to destination communities. This will help protect holiday destinations for the future and increase their value and appeal to customers. This will require working in partnership with governments and communities in tourist destinations.

2. Low-carbon innovation

We urgently need to seek, find and implement solutions to make tourism a low-carbon, low-impact industry. The industry needs to focus on trialling new technologies and taking them to scale. It should seek to increase energy efficiency and the use of renewable energy, and to reduce waste and demands on natural resources.

3. Driving customer demand

The industry has an opportunity to increase the market for sustainable tourism by promoting its benefits to customers and by developing further insight into what will motivate people to take sustainable holidays.

get involved

Help shape the next phase of *Tourism 2023*. Be part of the solution and link with industry peers as they join forces to tackle the biggest future challenges.

For further information contact: tourism@forumforthefuture.org



the Tourism 2023 scenarios

How will we holiday in 2023? No one can predict the future and the *Tourism 2023* scenarios do not try to. Instead, they explore the key uncertainties ahead and offer vivid images of possible futures.

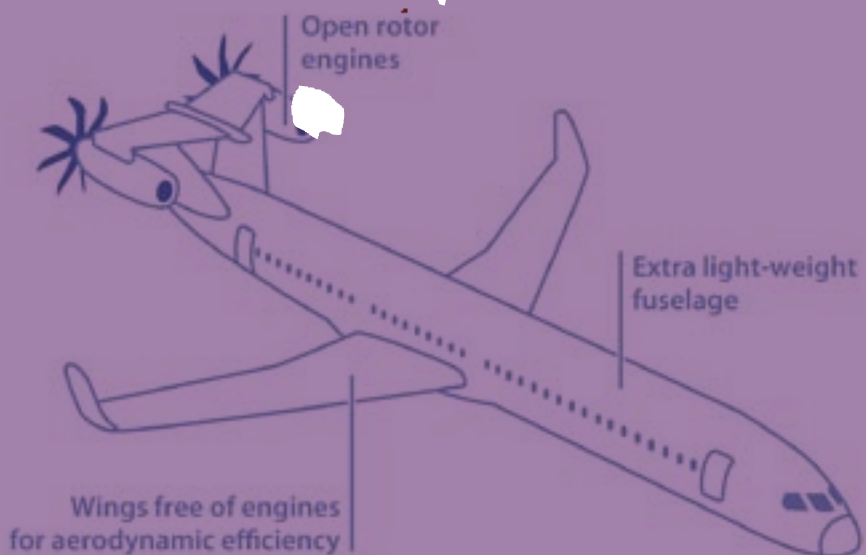
It can be fun to read scenarios and to try to imagine what the future might hold. But their real value lies in their practical application. Thinking ahead and planning for the long-term are essential parts of any organisation's strategic planning. The four *Tourism 2023* scenarios are invaluable tools for policy testing, strategy development and innovation.

We developed the scenarios with the help of more than 100 industry experts focussing on two key variables: whether the economy, politics, technology and energy costs combine to encourage or restrict overseas travel; and whether the appeal of overseas destinations and consumers' sensitivity to the environmental impacts of travel makes tourism more or less attractive.

They have already been used to inform the industry vision and develop and test its strategic approach, but they can be equally valuable to individual organisations. In Chapter 8 of this report we suggest three ways in which organisations can use them to develop their own strategy.

scenario summaries

To download animations of the scenarios go to:
www.forumforthefuture.org/projects/tourism-2023



1. boom and burst

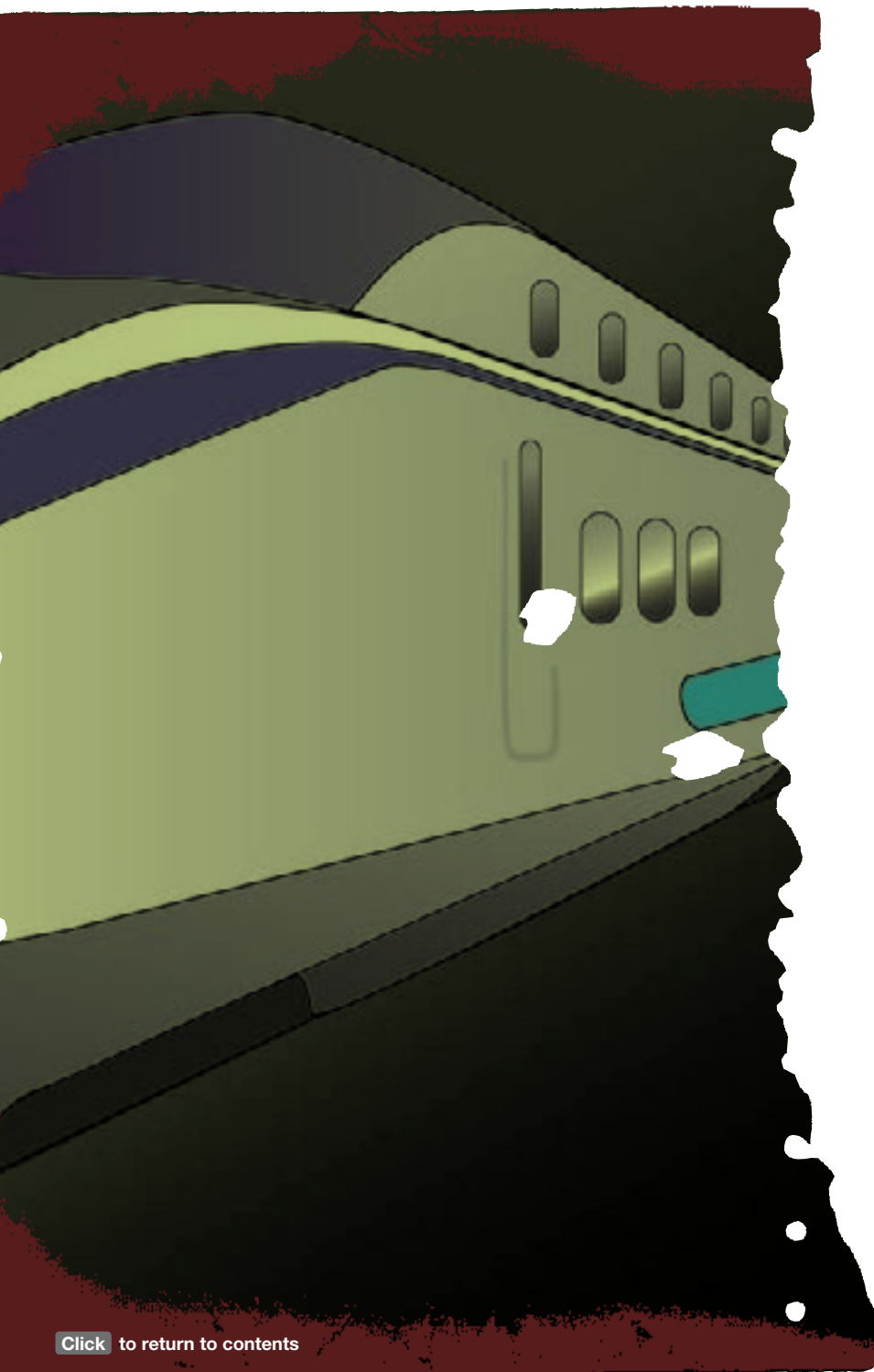
A booming UK economy and high disposable incomes have fuelled a growth in travel worldwide. People travel further, more frequently, and at faster speeds than ever before. There are many new reasons to go abroad as global political stability and prospering economies have opened up the world to more commerce and visitors.

Rapid advances in technology have been crucial, such as the breakthrough in algae-based fuels. Dramatic improvements in efficiencies have allowed the transport sector just about to keep pace with new regulations and their impacts, such as the steadily rising global price of carbon. But expensive trade-offs have been needed and the travel industry has effectively financed the decarbonisation of other sectors of the economy. Margins are tighter than ever and there has been mass industry consolidation.

The UK's older population is increasingly mobile, and has time to spare and cash to spend. Hordes go on cheap medical and beauty tourism breaks to Costa Rica and India, which offer substantial savings on operations. More flexible, part-time and semi-retirement working have driven demand for trips, and second home ownership abroad is booming.

The UK's legally binding carbon targets are being met – but many are asking how long this can continue. Many destinations are suffering from serious overcrowding. Wilderness is perhaps the scarcest resource as road, rail, sea and air routes have brought mass tourism to the last corners of the planet.

- Massive protests spoil the opening of the Mount Everest Theme Park.
- Tourists flock to see the ancient shrines and archaeological treasures of Iraq.
- Tourism puts huge strains on infrastructure in popular destinations like New York, Paris and London. Visitors are herded between attractions with timed tickets.
- High-tech 'carbon scrubbers' installed on the ground 'clean the air so you can travel'.
- British tour operator taken to court for mis-selling a 'remote holiday' which was disrupted by 500 Chinese motor-racing enthusiasts.
- Overcrowding in popular destinations has led to the rise of glamorous 'campsites', 'pop up' hotels with stackable modules, and floating resorts.
- **Fastest growing destinations:** the Democratic Republic of Burma, Yemen, Beyond Botswana Plc (Privatised Special Economic Zone), Somalia, Argentina, Brazil, Antarctica, Near space voyages, Papua New Guinea, Kazakhstan.



2. divided disquiet

A toxic combination of devastating climate change impacts, violent wars over scarce resources and social unrest has created an unstable and fearful world. This has made travelling overseas an unattractive proposition.

Many destinations were unprepared for the impacts of a changing climate. More extreme weather events, rising sea levels, increased flooding and frequent droughts have battered some places, while food shortages and malnutrition, malaria, and conflict over resources like water and oil have wreaked havoc in others. Tourism is an 'adventure activity' for only the bravest in the worst hit areas: the Sahara to the Middle East and Central Asia, sub-Saharan Africa, South Asian waterways and Small Island States.

A lack of cooperation globally has closed down borders and hampered movement. Protectionism is strong and global trade has shrunk. Tight security and additional visa checks make travel cumbersome and time-consuming for holidaymakers.

Visitors are highly selective in where and when they travel, cramming into a small number of destinations where overcrowding compounds the problems. 'Doomsday tourism' – where visitors rush to see fast-disappearing attractions – is popular in the glacier parks of Patagonia and the bleached corals of Australia's Great Barrier Reef. But many people have begun to think that holidaying abroad just makes the problems worse.

A breakthrough in affordable telepresence technology has proved surprisingly popular with businesses that are keen to cut costs. This resulted in drastically reduced numbers of certain air routes, closing them to many holidaymakers.

- 'One flight per year' policy for major US company encourages executives to cut costs with telepresence technologies.
- Tour guides with a military background hired as part of a holiday package for extra protection abroad.
- Residents of European resort sue local government over beaches polluted by tourists.
- Rising sea levels force Government of Maldives to step up relocation plans to India.
- Latest 'hot' holiday craze is massive resorts offering golf and skiing across sand dunes.
- Eiffel Tower auctioned off to a multinational corporation as part of sponsored heritage plan.
- **Fast growing destinations:** Norway, Ireland, Latvia, UK, Greenland, Doomsday Park, Canada, Denmark, France, Sweden, The Estonian Army Base Experience.

3. price and privilege

A dramatically high oil price has made travel punitively expensive. Dwindling supplies and rising demand from the new economies of Asia have pushed energy prices into a series of sharp and unpredictable spikes.

The travel industry worldwide has been badly hit and aviation has shrunk dramatically. Fleet replacements have been slower than anticipated and the predicted efficiency gains could not keep pace. There have been mass redundancies across the travel industry and a period of dramatic consolidation across the world.

Cost is the primary concern for holidaymakers as everyone asks: how far can I get for my money? Although a small, elite market continues to fly regularly, the vast majority of people simply cannot afford the experience. The days of affordable travel are now just a nostalgic memory.

People who want to holiday abroad either save up for years and fly overseas or join the new mass market of overland connections. Pan-European rail, bus and sea networks offer the most cost-effective means of travel for most people. State-of-the-art super-hubs provide seamless connections between different parts of the comfortable and affordable system of overland travel.

- Demonstrators take to streets in cities across the world demanding the 'right to fly'.
- Ukraine positions itself as the 'Gateway to the East' with new Kiev bus-rail megahub plan.
- 'Absolutely no frills' airline sector from some non-EU countries offers standing room only and no cabin crew.
- Banks offer holiday credit schemes allowing family and friends to save together for the annual trip.
- The Maldives blows its entire marketing budget on targeting the tiny super-elite market that can still afford to fly.
- A leading UK charity pays for one deserving family – voted for by the public in an online show – to experience a long-haul holiday by plane.
- **Fastest growing destinations:** Montenegro, France, Lithuania, Portugal, Germany, Central Europe Lakelands, SailRail breaks to Greece, Morocco, The Tropical Island Experience (Jersey), Ukraine.





4. carbon clampdown

The Government has introduced tradable carbon quotas for all UK households as part its bold plans to tackle climate change. Individual allowances are seen as the fairest way of allocating the 'right to pollute' equally.

The public has clamoured for tough action. Environmental impacts are increasingly felt, like the storm-surge disaster in the Thames Estuary in 2012, and people are better educated about climate science. Although there has been no great shift in cultural values, support for regulation is high.

The economy is more localised, and disposable incomes are low. The pound's weakness on the international stage means that exchange rates are unfavourable for overseas travel. A crisis over national pensions in 2015 resulted in several large company schemes defaulting on their obligations. This has left many with meagre pensions and costly medical bills in old age.

Many British holidaymakers are still keen to travel abroad, but perceptions of the purpose and real costs of travel have changed. Although distance is a key consideration, the reason for the holiday is crucial: what you are doing is more important than *where* you are. Ethical travel is a new mass market, and the government encourages this with the carbon rebate for volunteering whilst abroad.

The UK is experiencing milder winters and hotter, dryer summers. High levels of government investment in local resorts means that many people find their holiday needs can be met closer to home.

- Major travel firm goes bust after massive boycott coordinated by a popular website over its environmental policy.
- International celebrities snapped sunning themselves on the beaches in Norfolk.
- Stansted Airport closes due to overcapacity, temporarily re-opening as a large retail park.
- Red Cross Swarm uses social networks to send volunteers to disaster zones faster than official agency staff.
- Peer-to-peer holidaying allows people to 'swap lives' with another family and spend a year in another part of the world.
- Sail from Somalia offers a two-week adventure where arguing British couples can learn tips from the locals on post-conflict resolution.
- **Fastest growing destinations:** Cornwall, Ukraine, Sweden, Mozambique Special Volunteer Zone, Lithuania, Northumbria, Cork, France, Slow Boat Community (registered to Guyana), Liverpool.

2. factors shaping the future

How will we holiday in 2023? No-one can predict the future and these scenarios do not try to. Instead, they explore the key uncertainties ahead and offer vivid images of possible futures.

The shape of the UK's outbound travel and tourism industry in 2023 will depend on a complex interaction of many trends and uncertainties. In order to understand this better, we interviewed a wide range of travel and tourism academics, business leaders, campaigners, legislators and commentators about their hopes, fears and expectations for the next fifteen years. In all, we consulted over 100 stakeholders involved in the UK's outbound industry, drawing on representatives from organisations both large and small (see appendix).

Two industry workshops helped us to answer the questions: what are the most important trends in shaping the future of the industry and how predictable are those trends?

what can we be more certain about?

Some influences on the future are more predictable than others. Our in-depth research, industry workshops and expert interviews selected the following as significant and 'more certain' for 2023. This means the industry should be prepared for them whatever happens. For this reason, they feature in broadly the same way in all of our scenarios:

- **The impacts of climate change** will have dramatic impacts and reshape the industry over time. But these wide-ranging affects will differ from place to place: warmer temperatures in Northern Europe could attract more visitors for longer; but more extreme weather events such as hurricanes, rising sea levels, changing precipitation patterns, more forest fires, more heatwaves, shorter winter seasons and new disease distributions will dramatically reshape travel across the world.³ A recent report by KPMG ranked the transport and tourism sectors as the least well-prepared and amongst the most exposed to the physical risks associated with climate change.⁴
- **Drought and water scarcity** will be particularly important. In recent years, we've already seen Cyprus and parts of Spain come close to running out of water. With climate change intensifying, the threat will only increase. By 2025, 1.8 billion people are expected be living in countries or regions with absolute water scarcity.⁵
- **Growth in visitor numbers.** By the mid-2020s, the UN expects the world population to reach 8 billion. This additional 1.3 billion people will place dramatic new demands on the planet.

The growth of the middle classes in countries like China and India has the potential to dramatically reshape global tourism flows. Depending on the destinations that these new visitors will want to and be able to visit, massive sustainability challenges – from traffic congestion to eroded landscapes – are likely to intensify.
- **Cost of resources.** Against this backdrop of a changing climate and increasing pressures from growing populations, we can expect the cost of key resources such as food, building materials and energy to rise in many places as demand grows and supplies fail to keep pace.
- **Ageing UK Population.** By 2023, 38 per cent of the UK population will be over 50, and there will be 3.6 million more over 65s than there are today.⁶ This sharp rise could create an interesting new market, though there is a high degree of uncertainty over how affordable travel will be for this group (see below).
- **Political instability and regional conflict and terrorism** could be exacerbated by growing populations, dwindling resources and a changing climate. It is far from clear how severe these problems could be for UK outbound travel, but we can have some confidence that unexpected events in parts of the world will continue to pose challenges to the industry.

“The growth of the middle classes in countries like China and India has the potential to dramatically reshape global tourism flows.”

³ Hall, C.M.. and Higham, J., Tourism, Recreation and Climate Change, Aspects of Tourism, 2005

⁴ Climate Changes Your Business, KPMG, 2 April 2008

⁵ Food and Agricultural Organization, United Nations, 14 February 2007

⁶ Office of National Statistics, 2006

what should we be less certain about?

Scenarios are about managing uncertainty, and our research, interviews and workshops highlighted eight key trends that could be important, but about whose future direction we can be much less certain.

No-one can really claim to know how these trends will play out: that's why they form the key differences between our scenarios. We believe that it would be wise to prepare for a range of different possible outcomes to these factors.

1. How will people view mobility and the environment?

Whilst the impacts of climate change will certainly increase, we do not really know how people will perceive environmental issues or alter their behaviour as a result. For travel, the greatest uncertainty of all could be how consumers view the idea of mobility and how sensitive they are to its environmental impacts.

This is a tough area to make assumptions about and views are strongly held on both sides. On the one hand, there are those who argue that demand for holidaying overseas will always remain high: "it's the last thing people will ever cut back on" is a phrase we heard repeatedly.

Some research indicates that the public today do not think about the environment when making leisure and tourism choices⁷ and the Civil Aviation Authority found in 2007 that "at present, passengers' attitudes towards the environment do not seem to be having a significant effect on the demand for air travel".⁸

But how might this change over the next decade and a half? Opinion polls can track what people think, but they are less helpful at telling us how they act or would act in any future set of circumstances. Nevertheless, the changes in recent years are too dramatic to ignore.

Over the last four years, the level of agreement that people should be allowed to fly "as much as they like" has fallen from 78 per cent in 2003 to 63 per cent in 2007.⁹ Today, 80 per cent of adults say that they are 'very' or 'fairly' concerned about climate change.¹⁰ A separate study shows that 70 per cent agree that air travel has a serious effect on climate change.¹¹

The public also look increasingly likely to support environmental damage being reflected in the cost of travel. In 2004, only one in three people thought that the price of an air ticket should reflect environmental damage. Today, that has risen to nearly half and only a quarter of people expressly disagree with the idea.¹²

These shifts are significant and it would be foolish to ignore the potential for further changes when looking at a timescale of a decade and a half. The most recent British Social Attitudes survey concluded that there is now emerging evidence amongst the UK public of "the beginnings of a shift towards consistently environmentally conscious attitudes towards air travel".¹³ As people start seeing the impacts of climate change for themselves when they travel, this could well increase.

But air travel will not be the only sector affected. We can expect that, by 2023, public awareness of the impacts of all forms of travel will be much higher than it is today. Over the next 15 years, the impacts of climate change will increasingly be felt and reported on in diverse forms of new media. Leaders in business and politics are expected to accelerate their action due to the urgency of the task ahead. Studies show that whilst most people do not currently draw a strong link between their personal behaviour and climate change, increased amounts of information significantly alters their attitudes.¹⁴ This will have an impact beyond just the choice of transport and could affect where people want to visit, where they stay, the activities they undertake and how they behave on holiday.

So the debate is not over whether consumers will or won't be aware of climate change and wider sustainability issues by 2023. The remaining difference of opinion is over how dramatically they might alter their behaviour as a result.

Our scenarios explore the range of plausible outcomes for 2023. In *Boom and Burst*, awareness of the issues is higher than today, but strong industry action and advanced new technologies mean that holidaymakers continue to want to travel far and frequently, indulging in a 'guilt-free' experience. But in *Carbon Clampdown*, a series of dramatic climate-linked events combined with high political and business awareness has resulted in consumer attitudes to mobility that are dramatically more sensitive than today.

"We can expect that, by 2023, public awareness of the impacts of all forms of travel will be much higher than it is today."

⁷ Miller et al, 2007

⁸ Recent Trends in Growth of Air Passenger Demand, Civil Aviation Authority, January 2008

⁹ British Social Attitudes Survey, National Centre for Social Research, 28 January 2009

¹⁰ Department for Transport, October 2008

¹¹ British Social Attitudes Survey, 2009

¹² British Social Attitudes Survey, 28 January 2009

¹³ *ibid.*

¹⁴ Exploring Public Attitudes to Climate Change and Travel Choice: Deliberative Research, Department for Transport, January 2009

2. How might legislation shape travel?

Experts agree that controls over emissions of greenhouse gases across the economy will steadily increase over the coming 15 years and beyond. The UK now has a legally binding commitment to reduce greenhouse gas emissions, currently by 34 per cent on 1990 levels by 2020.¹⁵ If a global deal is reached, this target could increase to 42 per cent.¹⁶ In 2007, the UK's greenhouse gas emissions were 18.4 per cent below 1990 levels, so there's still some way to go.¹⁷ With this in mind, all of our scenarios reflect the likelihood that emissions will be more controlled by 2023 than they are today. But how severe might the legislative and regulatory changes be for outbound travel and tourism, and will they operate at a national, EU or global level?

Whilst aviation isn't included in the Kyoto protocol, the next round of climate negotiations may address this issue head on. The EU recently announced that it will bring aviation into its own emissions trading scheme, with airlines expected to pay for the proportion of carbon credits that are auctioned and any additional emissions above their cap from 2012. Recent research suggests that it will cost the industry £848M if the industry has to buy around 15 per cent of its carbon allocation through EU ETS.¹⁸ And some estimates suggest that requiring airlines to pay the full environmental costs of flying could increase fares by as much as five times.¹⁹

For the Civil Aviation Authority, air traffic in the near future "is more likely to be affected by changes in the cost of aviation rather than attitudes of passengers to the environmental effects of flying".²⁰ Others disagree and argue that political intervention

is only likely to advance hand-in-hand with growing consumer awareness. Would a British government be bold enough to price high-carbon activities in a way that significantly reduced travel without support from a large section of the population?

Such support from the public to pay more will be crucial, the experts we spoke to suggested. The latest polling evidence suggests that around a third of consumers currently believe that "the price of a plane ticket should reflect the environmental damage that flying causes, even if this makes air travel much more expensive"²¹ – a figure that has risen in recent years. Similarly, the British Social Attitudes Survey found "only low levels of opposition to the prospect of a steep rise in air fares in order to reflect the environmental damage caused by air travel" and pointed to "a move towards people not only being concerned about the environmental effects of air travel but also the need to take action to do something about it".²²

As before, there is clearly a difference between what people say they're prepared to do, and what they would actually tolerate or even vote for. However, with such significant proportions expressing support today, this is clearly a major uncertainty for 2023. The history of seat belts and smoking bans shows that public attitudes can change quickly when regulation changes. Our fourth scenario, *Carbon Clampdown*, explores the tight relationships between environmental awareness and a highly interventionist regulatory regime.

3. How expensive will energy be?

We got a strong steer from the experts and the industry workshop on the likely price of oil by 2023: high. Differences of opinion only emerged over whether the industry would find it "tolerably high" or "catastrophically high". The other key factor is price volatility, which is more uncertain and has the potential to be much more disruptive than a predictably high price.

Historically, oil price shocks have proved highly disruptive. The crisis of the 1970s was one of the few 'external shocks' that has permanently changed underlying trends for the UK's travel industry.²³

The record price of nearly \$150 a barrel in July 2008 came as a surprise to many. Looking ahead to 2023, it's likely that this could be looked back on as a tame harbinger of things to come. The International Energy Agency had declared that the "era of cheap oil is over" and expects oil prices to return to \$100 a barrel before 2015.²⁴ McKinsey recently forecast the possibility of an alarming new oil price spike as early as 2010.²⁵

Several analysts have suggested that oil above \$100 a barrel may be unsustainable for parts of the global travel industry. One scenario for the United States has suggested domestic flying could fall by 40 per cent by 2025 due to oil prices alone – even with a 50 per cent improvement in energy efficiency.²⁶ Clearly, the interaction between oil supplies, demand and technologies is a crucial variable and the industry should prepare for variations in how this trend could play out. Our *Price and Privilege* scenario explores who might be travelling and what the industry could look like with a series of severe oil price spikes towards 2023.

"The history of seat belts and smoking bans shows that public attitudes can change quickly when regulation changes."

¹⁵ The Budget 2009, HM Treasury

¹⁶ Building a low-carbon economy – the UK's contribution to tackling climate change, UK Committee on Climate Change, December 2008

¹⁷ The UK's Fifth National Communication under the United Nations Framework Convention On Climate Change, Department of Energy and Climate Change, 2009

¹⁸ Point Carbon and RDC Aviation research in 'Cost of aviation heading skyward' Financial Times, 09 August 2009. www.ft.com

¹⁹ John Whitelegg from York University's Stockholm Environmental Institute, cited by Plumer, B. The End of Aviation, New Economy, Winter 2008.

²⁰ Recent Trends in Growth of Air Passenger Demand, Civil Aviation Authority, January 2008

²¹ Department for Transport, October 2008

²² British Social Attitudes Survey, 28 January 2009

²³ Civil Aviation Authority, January 2008

²⁴ World Energy Outlook, November 2008; figures which were supported by later research in Averting the next energy crisis, McKinsey Global Institute, March 2009.

²⁵ Scott S. Nyquist and Jaeson Rosenfeld, Why Energy Demand will Rebound, McKinsey Global Institute, May 2009

²⁶ Transport Revolutions, Perl, A. and Gilbert, R. cited in Plumer, B. The End of Aviation, New Economy, Winter 2008.

4. How strong will the UK economy be?

The strength of the UK economy and how much money people have to spend on travel is evidently an unknown for the future. The current recession took many by surprise and its long-term impacts on the UK economy are uncertain. Recent figures suggest that the economic downturn and higher oil prices caused a remarkable and unprecedented shift from air to overland travel during 2008.²⁷

The growth in air travel from the early 1990s to 2005 was closely tied to a strong UK economy, large increases in household incomes and growing home ownership abroad²⁸ as well as more affordable travel from low-cost airlines. A quick recovery from the current recession and a new chapter of this story is explored in *Boom and Burst*. Conversely, unavoidably expensive travel and its consequences for the accessibility of travel to the average consumer – with more similarity to 1950s luxury travel than the 1990s low-cost boom – is explored in our scenario *Price and Privilege*.

Economic changes can also alter people's mindsets and values. Research suggests that holidaymakers in 2009 are being drawn towards much more local and 'authentic' travel, and operators promoting themselves as responsible are prospering²⁹, a theme whose further development we explore in *Carbon Clampdown*.

5. Will new technologies be successful?

Two areas of technology could be important for the future of travel and tourism. Firstly, new transport and fuel technologies have the potential to offer steady improvements (such as in energy efficiencies) as well as dramatic breakthroughs (for example with algae-based fuels). The International Air Transport Association recently declared that the success of biofuel tests means that commercial certification is possible as early as 2010–11.³⁰ *Boom and Burst* explores the successful deployment of the most advanced technologies over the coming decade, facilitating growth in an industry that keeps pace with regulation and rising energy prices.

However, many big question marks remain over such technologies. For example, can the next generation of biofuels really provide low-emission travel without contributing to some of the unintended consequences that we've already seen, such as food price rises? A wider but no less critical question is whether or not any technologies can effectively be developed at the speed required to tackle the challenges of climate change. A world where the promised technologies fail to deliver and cannot keep pace with the resulting regulation is explored in *Carbon Clampdown*.

Secondly, what role will communication technologies play? We can expect that computers and digital technologies in 2023 will be hundreds of times more powerful than they are today; many more digital links feature in all scenarios. But could these ever start to replace the need for movement? For most of the experts we interviewed, online experiences can never replace travel: real, face-to-face exchanges cannot

be replicated by any digital experience. If anything, the spreading internet and improved 'real life' simulation will actually enhance the desire for millions worldwide to travel and experience 'the real thing'.

On the other hand, history shows that technologies – particularly in communications – offer a potentially massive disruptor that could be unexpected, dramatic, and only really understood in hindsight. For businesses, change could be quite swift as the availability, convenience and cost of advanced videoconferencing or telepresence technologies all align. And replacements for business travel could have important impacts on the affordability of some routes for leisure trips. By some estimates, up to 20 per cent of global business travel could be substituted by such technologies by 2020.³¹ A survey of UK companies has suggested that around 89 per cent expect that they will want to fly less over the next decade and 85 per cent think that videoconferencing will help them to do so³² – and that was polling undertaken before the recession. Our scenarios address this debate head on: *Boom and Burst* explores a world where advanced ICT enhances the desire to travel, while *Divided Disquiet* looks at how cost-effective videoconferencing could take off and replace the need for some trips.

6. How active will older people be?

Whilst we can estimate the approximate number of older citizens in the UK by 2023, we do not know whether they will be able to go on holiday in large numbers. In *Boom and Burst*, we explore how a highly mobile, mass market of retirees has time to spare and cash to spend, creating an adventurous generation that wants to see it all. But in *Carbon Clampdown*, a lack of personal savings, a ballooning crisis over national pensions and costly medical bills in old age mean there's little cash left for holidaying.



²⁷ World Travel Trends 2009, ITB, May 2009

²⁸ Civil Aviation Authority, December 2005

²⁹ travelmole.com with responsibletravel.com, 19 May 2009

³⁰ AFP, 31 March 2009

³¹ Smart 2020, The Climate Group, 2008

³² Travelling Light, WWF, 1 May 2008

“The risks posed to global tourism by economic collapse, geopolitical instability, governance and corruption, pandemics and violent conflicts are all very real considerations for the future according to the World Economic Forum.”

7. How will the new global economies develop?

Some estimates suggest that by the mid 2020s China's economy could be the largest in the world.³³ The development of a new middle class in countries we today call the 'emerging economies' will be a key force shaping the world over the coming decade. The World Tourism Organization estimates that by 2020, there will be 100 million outbound tourists from China, and 50 million from India.

A shifting centre of economic and socio-cultural power to the East, vast numbers of new middle-class tourists keen to experience the world, and intense competition for the UK's industry from new providers feature in all our scenarios, as we believe this trajectory is relatively clear.

But how will British holidaymakers react to the different faces of destinations? From Brazilians in Bangkok to Chinese on the Costa Blanca, how will holidaymakers respond to these rapid changes? We explore a cheerful but crowded mixing in the globalised *Boom and Burst* alongside the more divisive and at times xenophobic response of *Divided Disquiet*.

8. How attractive and welcoming will destinations be?

The decision to travel is motivated by the attractiveness of a destination. But we know that the costs of energy and food, impacts of climate change and competition for key resources such as land and water are all likely to rise. When set against the backdrop of rising populations and numbers of international visitors, there is the potential for a massive burden on holiday destinations. The UK Government's Chief Scientist, Professor John Beddington, recently called this worrying but very plausible blend of climate change and resource constraints the 'perfect storm'.³⁴ We explore the impacts of such a storm on the travel industry in *Divided Disquiet*.

The risks posed to global tourism by economic collapse, geopolitical instability, governance and corruption, pandemics and violent conflicts are all very real considerations for the future according to the World Economic Forum.³⁵ Such impacts could be geographically specific, resulting in particular regions becoming inaccessible, or globally spread – like the recent swine flu pandemic – with the potential to disrupt travel worldwide.

The British Government rates a physical attack on its transport systems and electronic attacks on UK networks as the two most likely and severe risks that the country faces today.³⁶ Security constraints at airports and the 'hassle factor' of travel should be considered a major uncertainty for the future.³⁷

Destinations, too, could actively take steps to discourage large numbers of visitors, for example by raising prices or entry taxes at a particularly popular but sensitive location. Some locations have already begun to implement a form of 'rationing'. For example, the Galapagos Islands is considering new curbs on visitors to protect the most sensitive sites.³⁸ Could growing visitor numbers, combined with resource shortages, severe challenges from climate change and social unease, interact to cause some destinations to turn away from mass tourism, focusing on a smaller, higher-value audience or banning tourists altogether? We explore such an outcome in *Divided Disquiet*.



³³ PwC, The World in 2050: Beyond the Brics, March 2008

³⁴ BBC News, 19 March 2009.

³⁵ Global Risks 2009, World Economic Forum

³⁶ National Risk Register, Cabinet Office, 9 November 2008

³⁷ Civil Aviation Authority, January 2008

³⁸ The Daily Telegraph, 4 February 2009

3. building the scenarios

The four scenarios have been constructed to be plausible but stretching. They are not meant to predict the most likely outcomes for 2023 nor represent favourable or unfavourable futures. Instead, they offer a set of possible futures and provide a challenge to the industry, each with their own risks and opportunities. They are tools that industry bodies can use to assess current strategies and come up with new ones that will be fit for a range of futures.

Scenario construction

The scenarios were constructed with the help of a series of industry workshops, drawing on the uncertainties highlighted in our research and expert interviews.

Two key variables were used to construct the differences between the scenarios, representing the major uncertainties that we see towards 2023:

- **enabled** or **inhibited** – whether the economy, politics, technology and energy costs combine to facilitate or constrain overseas travel.
- **‘attractive’** or **‘less attractive’** – whether the sensitivity of consumers to the environmental impacts of their travel and the attractiveness of overseas destinations make outbound travel popular and desirable, or comparatively less attractive and less appealing.



These scenarios are the sole responsibility of Forum for the Future and do not necessarily represent the views of our sponsoring partners.

4.

scenario:

1.

**boom
and
burst**



A booming UK economy and impressive advances in transport technologies have fuelled a growth in travel worldwide. People travel more frequently, further and at faster speeds than ever before and there are many new reasons to go abroad.

But precarious trade-offs have been needed in order to meet the UK's emission targets, and many destinations are suffering from serious overcrowding. People are now asking: how long can this growth be maintained?

how we got here

- 2010** • Economic stimulus packages avert a long recession and strong routes to recovery become evident. Following the Copenhagen Climate Change Conference, further green stimulus is provided and heavy investments flow into green technology.
- 2010** • Ambitious carbon self-regulation strategy published by UK outbound industry outlining how emissions targets will be met.
- 2011** • A 'new era in the history of mankind' is declared as the first space flight takes six tourists up to 360,000 feet and 2500mph, over three times the speed of sound.
- 2012** • Breakthrough declared in trials for aviation fuel made from a blend of algae and jatropha plants as a low-carbon option. New navigation systems and plans to eliminate inefficiencies in air traffic control are the foundation of the harmonisation of global airspace management agreed on at Copenhagen.
- 2013** • Fuel cell-powered passenger ferry begins cross Channel service, offering impressive emissions savings.
- 2014** • The UK's Department for International Development launches a campaign to promote the benefits of tourism for overseas development.
- 2015** • William Edwards, 91, from Huddersfield becomes the oldest person ever to complete an overland round-the-world trip. He is joined by a BBC film crew for the final leg in a hybrid electric car.
- 2016** • Democratic elections in Burma open the country up to a wave of tourism.
- 2017** • Kazakhstan transit railway opens to link China to Iran and the Caspian Sea, halving the time of cargo travel from the Pacific Ocean to western Europe.
- 2018** • World Trade Organisation begins new round of trade talks, proposing to eliminate 'all remaining trade barriers'.
- 2019** • Russian business consortium begins work on the world's longest tunnel connecting Russia to Alaska with a 63-mile high-speed train line, gas pipelines and fibre-optic cables.
- 2020** • European Parliament considers plans to stagger school holidays to avoid saturation at popular tourism destinations.
- 2021** • The opening of the small Mount Everest Theme Park near base camp is marred by massive protests from local Nepalese.
- 2022** • British entrepreneur launches working prototype for the world's first commercial plane-car hybrid as the world population hits 8 billion.



the world in 2023

Economic growth has fuelled expansion and opened up the world

Overseas travel is reasonably affordable and highly desirable for many people in the UK. After a quick recovery from the 2008-09 recession, high disposable incomes have provided cash for regular business and leisure trips.

There has been a significant shift in economic, political and cultural power. New patterns of trade and migration between the powerful nations of China, India and Brazil sustain many more routes and create hundreds of millions of new outbound tourists. Face-to-face contact is crucial for linking up new business partners from London to La Paz or Luanda, opening up more routes across the world. These dramatic changes have created exciting new destinations for UK holiday-makers and powerful new business competitors for the UK travel industry.

Global stability, in finance and government, has opened up the world to more commerce and visitors. New road, rail, sea and air routes have advanced through deserts, across the oceans, into untouched forests and over mountain passes in an unstoppable march into the last corners of the planet. The plane, bus, train, ship and car have conquered wilderness from the Arctic to Amazonia and brought mass tourism with them.

There are many new reasons to travel

The UK's older population is increasingly mobile, and have the time and cash to travel. This mass market of wealthy retirees, who have lived with ever expanding opportunities to travel, leads the charge in exploring far and wide. Groups of over-65s from the UK are a frequent sight, backpacking along the Silk Road in China, whilst the teashops on the south coast of England are filled with the bustle of Chinese teenagers.

And these silver voyagers have many new reasons to go abroad. Hordes go on cheap medical and beauty tourism breaks to Costa Rica and India, which offer substantial savings on operations compared to the UK. Some resorts routinely offer an operating theatre on-site. Others boast the most attractive retirement homes in the world.

New destinations offer fresh experiences, such as visiting the ancient shrines and archaeological treasures of Iraq. Worldwide economic growth has fuelled investment and expansion, producing more destinations, more visitors, more travel routes, more hotels – and many more areas close to saturation point.

Other social trends in the UK have driven the popularity of travel: the growth in single-person households and the tendency to start families later have freed up time; flexible, part-time and semi-retirement working have grown with super-high-speed broadband connections; and more temporary migration and the booming market for second homes abroad have created many more opportunities to travel. Nearly two million British homeowners now own a second home abroad, with countries like Turkey, Oman and Canada amongst the fastest rising in popularity.

Technology has driven progress

The globalised economy, linked by 'always-on' communications, is tightly connected. Dramatic advances in information technology have enhanced the desire to see the world. Just as in the past, when television and film inspired many new dreams and journeys, today's online experiences have fuelled a yearning to experience the real thing. Rapid advances in technology have been critical to sustaining the growth in travel, such as the breakthrough in algae-based fuels that have allowed new fuel mixes. Rapid improvements in efficiencies have also been crucial to allowing transport to keep pace with regulation.

The sector pays for expensive carbon trade-offs

A global carbon price was introduced in 2014, and is steadily rising. The travel sector has contrived to grow whilst the UK tries to stay on track to meet its legally-binding carbon reduction targets. Carbon-intensive sectors pay a premium for their emissions and other sectors of the economy have had to make even greater cuts than planned. The UK's travel and tourism industry has effectively financed the decarbonisation of other sectors of the economy through emissions trading. So the UK's legally-binding carbon targets are being met – but many are asking how long this can continue.

Global growth in travel has had a serious impact on emissions and many now voice concerns for the future viability of the sector. Noise pollution and airport expansion continue to be hotly contested political issues across the world. But the demonstrable benefits in destinations have helped maintain a licence to operate.

A growing global economy has also pushed up oil prices, but so far these have not proved an obstacle to travel, although it is more expensive and margins are tight. Taken with the rising cost of carbon, the conversion to low-carbon transport is no longer an environmental issue – it's an economic imperative (and has been for a while).



the UK outbound travel and tourism industry

The travel industry today has grown and transformed to meet the new demands for further, faster and more comfortable travel that meets pollution targets and remains affordable.

By air

For airlines, the pace of innovation has accelerated: ambitious year-on-year improvements in engine efficiency and highly efficient air traffic management have been essential in making air travel affordable in a world of globally priced carbon. For example, new open-rotor engines are beginning to enter service on some routes. The skies are still filled with conventional jets, some of which are now burning algae fuel blends. Because many consumers and operators favour 'clean fuel' resupply, certain airports use higher mixes than others. Customers can pick their airport on the basis of the fuel mix available – but this also has a bearing on the cost of flights.

However, questions still remain over how sustainable biofuels really are on a large scale. Critics have accused the industry of glossing over the impacts of massive biofuel production on food supplies. Food prices have continued to rise, with the world's population now at 8 billion. This ramps up the pressure on biofuel producers as jittery investors continue to raise doubts about its long-term viability.

The new means of moving have also been exciting. Things have come a long way from the pioneering days of the first 'space-tourists' in 2001. Today, suborbital space flights frequently transport the wealthy into near space. Entrepreneurs and research teams are developing advanced twin-fuselage aircraft, hypersonic jets and super-jumbos. One company has trialed high-tech 'Carbon scrubbers' installed in the desert and powered by solar energy that, as the slogan alleges, 'clean the air so we can travel'. Trials were heavily delayed in the hunt to find a secure way to store the CO₂ in a way that avoided leakage. There are even plans for a hydrogen plane and serious talk in the industry of zero-carbon flying by mid-century.

By sea

On the seas, the largest ships routinely carry 7,000 passengers. These 'cities on water' feature everything you could possibly need, from circus entertainment to cosmetic surgery. One UK University offers a 'cruise term' for students, where lectures, tutorials and site visits take place from the water.

Meanwhile, smaller powercraft criss-cross the oceans in personalised point-to-point travel for the rich, and hybrid electric 'sails' are being used on some vessels. As a result, shipping lanes are crowded and queuing to get into ports is common.

By land

Rail networks have expanded too, as a rapid, comfortable and attractive means of travel with full onboard entertainment systems. New high-speed train routes have opened up to meet this new demand, such as the direct connection from Birmingham to Barcelona.

Customer expectations: high and diverse

Consumers are keen to travel abroad but are by no means de-sensitised to the impacts of their movement. Awareness about the environmental impacts of travel is high but people seem content that the industry is taking action. Travel is a 'guilt-free' experience for most and something that people are prepared to invest in.

Business plays a strong role in society. The industry's proactive self-regulation has been essential for making the argument for more travel. Its effort to demonstrate its positive impacts on development overseas has also helped. But a vocal minority contest this 'narrow' definition and question whether huge tourism influxes are really beneficial.

Today's experienced travellers demand exceptionally high levels of comfort and service – always tailor-made to their personal preferences. The generation once called the 'digital natives' who grew up with connected technology, now approaching its 40s, demands seamless check-in and joined-up journeys. If UK companies can't provide that, they pick an international firm

that can. All forms of transport have had to install larger seats to cope with the one in three UK passengers who are overweight or obese.

British holidaymakers demand a huge range of choice: very short breaks but also two-year sabbatical experiences; long-haul from one megacity to another, but also short hops between towns.

Some demand quick, indulgent trips that take them far and fast to the exotic ends of the earth for a weekend; many more are looking at experience-based travel, tailored around their current hobby or interest at times and places that suit them. The fast-paced intensity of the world means that those offering escapism, adventure and relaxation are prospering, whilst spreading globalisation and massive tourism flows mean that the top-end market pays for the genuinely authentic, memorable, isolated, culture-rich and novel. This proliferation of choice means smaller companies have prospered in their own, innovative niches, whilst international consolidation amongst medium to large firms from within and outside sector has been intense.

the holiday journey 2023

The solo traveller

A video message from the Head Teacher wakes Imran at his flat in Cardiff. There's been another heatwave so college is closed for the rest of the week – time to go abroad. Imran rolls over to his digital bedside table and searches for a quick break. It looks like there's a good deal to Bolivia, with Chinese company Xiànzài offering a point-to-point flight leaving in twenty minutes. So, after checking the company's carbon management certification, he checks his bag in and selects the videos for his personalised in-flight 'magazine'. Then it's a short walk to the local airfield and he's away on one of those new super-efficient planes that lands at one of Bolivia's many airfields. After 20 minutes by solar-powered boat across Lake Titicaca, he is relaxing for six days and experiencing a new culture, but it's much more crowded than he'd hoped.

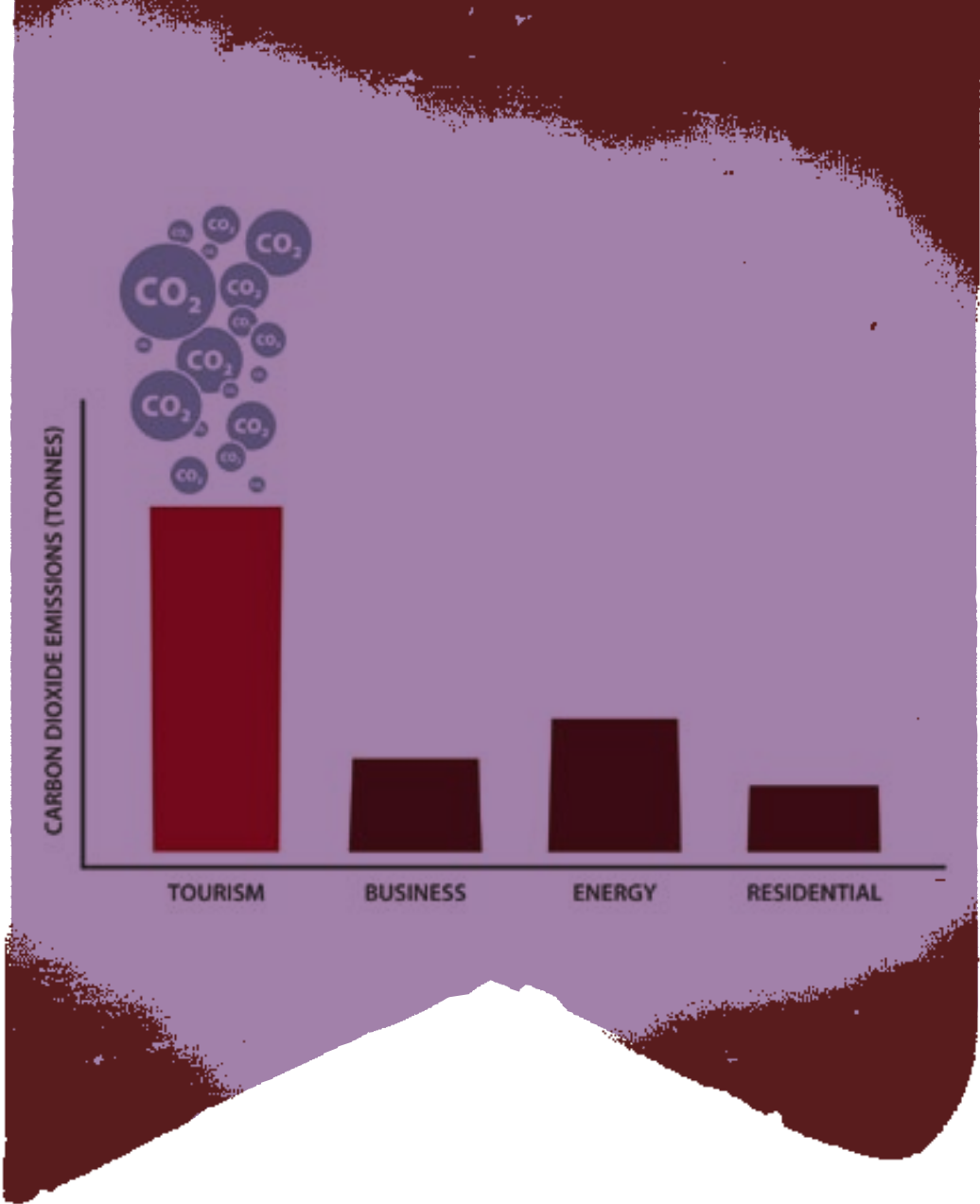
The family holiday

Like most families, the Lawsons are regular travellers and have already taken a six-day break in Brazil and a weekend in Lebanon earlier this year. For Christmas, they want something really different, and their supermarket has offered five tailor-made recommendations in a video clip, automatically personalised from their feedback on previous holidays. Their childcare needs and dietary requirements are built in to all of the suggestions. The family selects a 15-day rail and waterway extravaganza across Russia. The youngest daughter, Violet, has spent weeks exploring all the sights virtually and is excited about seeing the real thing. The trip is a huge success,

with the highlight on their last day when the family put on their digital glasses to experience a re-enactment of the storming of the Winter Palace.

The retirement trip

Mr and Mrs Jones are looking forward to their retirement: John has sold his online business and Anna has opted to work remotely part-time for her job with a big Indian bank. They've saved up the cash and set aside two and a half years to travel the world. The couple set off with a gentle five weeks 'retro-backpacking' in Australia and the nostalgia bungee jump is a big hit with Anna. Whilst in Singapore, John's planning to have his hip done at a walk-in centre before relaxing for four months at their favourite Golden Years UK Holiday Village in Vietnam.



destinations

Hundreds of millions of tourists travelling across the world have created serious management problems in all destinations. But leading destinations have adopted some highly innovative management strategies in order to continue to welcome large numbers of visitors.

Overcrowding and disappearing wilderness

Overcrowding has presented the greatest challenges to most destinations, and the natural environment has suffered as a result. Many coastal resorts in popular places like Morocco and the Black Sea have reached saturation. Here, criminal gangs have taken to trucking lorry-loads of stolen beach sand to places in short supply.

The erosion of many natural areas has put off some visitors. This leads to a constant pressure to open up more and more land to tourism.

Wilderness is the scarcest resource. Unclimbed peaks, uncharted rivers and unlittered beaches are a thing of the past. The paved road to Mount Everest's base camp with its commercial vending machines has provoked furious protests.

It is becoming increasingly difficult to offer genuinely isolated experiences. One high-profile court case in London recently ruled that a company had mis-sold a 'remote adventure' that was spectacularly disrupted by 500 Chinese motor-racing enthusiasts. Expectations are now better managed: tour operators have been forced to redefine 'remote' to mean 'non-urban', and the luxury of reaching some of the planet's

last remaining untouched areas is reserved for billionaires.

From local town halls in destinations to concerned holidaymakers back in the UK, many are now asking: how long can this growth be maintained? Have we sacrificed our wild spaces forever?

Innovative strategies to overcome the crowds

In order to manage this growth, all destinations have changed. Cities like Paris, New York and London are feeling the strain, with infrastructure close to breaking point. Tight management is an imperative: visitors are timed and ticketed as they are herded between popular attractions.

Increased demand for travel combined with a warmer climate has brought a seasonal shift, with autumn and spring in Europe increasingly popular and less expensive. Destinations are keen to promote this: spreading demand across a longer tourism season not only keeps cash flowing throughout the year, but also helps to dilute some of the intense pressures on water and energy supplies during the summer months.

Glamorous 'campsites' have sprung up near some of the world's most popular tourist sites to meet the need for accommodation. Booking ahead is essential in these places. Online communities have also developed to connect would-be campers with sites in people's gardens, fields and forecourts.

'Pop-up' hotels that can be re-assembled in any location during peak times provide another solution; stackable modules

delivered by ship provide cheap rooms, bathrooms and the latest digital technologies within a simple container. Floating resorts that are towed to new locations are booming along the crowded coastlines.

Technology provides some respite, helping holidaymakers navigate saturated places and offering attractive new handheld entertainment to make up for disappointing sights. Personal communication devices are all fitted with GPS, and optimised searches make it easy to find places to sleep, eat or be entertained, tailored to the users' own needs and mood.

At the larger attractions, just as audio handsets used to offer a spoken voice in a museum, today's augmented reality headsets allow you to visualise your guide and show you how a place would have looked in a different era. For example, The Real Pyramids Experience, part-funded by a global drinks brand, allows visitors to walk amongst digitally-created Ancient Egyptians, while the illusory guide sips modern branded beverages.

Cooperation for success

Some destinations have been successful at managing overcrowding and created a more sustainable pattern of growth. The UK market increasingly views these places as sanctuaries of inspiration amid this hot and crowded world.

For tour operators, cooperation is key. They audit their supply chains closely and they've needed to invest in strong relationships with communities to manage growth. Good salaries and improved conditions, demonstrating to visitors the benefits of tourism, have been crucial in all destinations to maintain an attractive experience that genuinely welcomes visitors in this highly competitive market.

Hoteliers and tour operators in the most successful locations have cooperated to achieve shared outcomes. For example, collective water management systems are popular in the Mediterranean, whilst renewable micro-power is pooled between sites in Latin America.



fastest growing holiday destinations for UK visitors



- 1 The Democratic Republic of Burma
- 2 Yemen
- 3 Beyond Botswana Plc (Privatised Special Economic Zone)
- 4 Somalia
- 5 Argentina
- 6 Brazil
- 7 Antarctica
- 8 Near space voyages
- 9 Papua New Guinea
- 10 Kazakhstan

3 February 2023

Dear mum,

Sorry to send you yet another postcard this year, but this trip really has been pretty eye opening. You're right - the supermarket did pick a great itinerary for me. But Manila is not how it looked in the video brochure - it's a lot more crowded! Still, I got my teeth done much more cheaply than I could have in the UK, and now I've tried remote working I see why you think a second home abroad might be fun! See you next week in Brazil!

Love, David



5. scenario:

2.

**divided
disquiet**

Travelling overseas is an unattractive proposition. A toxic combination of devastating climate change impacts, violent wars over scarce resources and social unrest has created an unstable and fearful world. Security is tight and travel is cumbersome, time-consuming and inefficient.

Visitors are highly selective in where and when they travel, cramming into a small number of destinations where tight restrictions and overcrowding compound the problems. Many people have begun to think that holidaying abroad just makes the problems worse.

how we got here

- 2010** • World Trade Organisation warns of “a new era of global protectionism” in response to the economic recession.
- 2011** • Association of South East Asia Nations announces a focus on intra-regional tourism.
- 2012** • Weeks before the London Olympics, air traffic control at Heathrow is temporarily shut down due to an ‘electronic attack’ by unidentified militants.
- 2013** • Breakthrough in affordable telepresence technology. Major US company declares a permanent ‘one flight per year’ policy for senior executives to cut costs.
- 2014** • Ecuadorian government suspends all tourism permits for three years to protect the Galapagos Islands from further environmental degradation.
- 2015** • New round of international climate change negotiations collapses. Asian nations accuse US and Europe of “neo-colonial bullying” whilst China is accused by the US delegation of submitting “totally fabricated emissions data”.
- 2016** • Caribbean Islands battered by series of storms that wreck hotels and cause major disruption to food supplies. British holidaymakers trapped after rioting breaks out in several towns.
- 2017** • Devastating bio-chemical attack shuts down UK transport for three days and results in harsh and intrusive increases in travel security.
- 2018** • Two airliners collide after botched reconfiguration of Paris’s air traffic systems to cope with increased demand. ‘Campaign for Safe Flying’ organisation holds a rally in London.
- 2019** • Malaria outbreak in Greece sees mass of cancellations by British holidaymakers.
- 2020** • British cruise ship refused permission to dock in Mediterranean after pandemic ‘flu spreads onboard.
- 2021** • Dutch residents describe ‘anarchy’ after 1,000 English, French and German retirees go on a violent, drink-fuelled rampage in Amsterdam.
- 2022** • Newly elected Mayor of one Mediterranean town declares “the beginning of the end of tourism” after voters turn against mass visitors following local damage.



the world in 2023

Devastating impacts in a divided and fearful world

Climate change has begun to severely impact on travel and tourism worldwide, and the knock-on effects have been profound. Rising sea levels and more frequent, extreme weather events batter once popular destinations; unexpected social unrest, population movements and food rioting create problems elsewhere. Parts of the Mediterranean are fast becoming uncomfortably hot during the holiday months, and fierce fighting over water shortages has obliterated tourism in parts of North Africa. The financial cost of climate change – from higher insurance premiums to increased taxation to fund recovery efforts – has hit both businesses and consumers.

A lack of global cooperation over the interrelated issues of trade, climate change and key resource shortages has split the world into protectionist blocs. The prevailing mentality is to look out for one’s national interest. Borders are closed down with tight security, and the hassle of visas and extra security checks impedes travel across the world. Obtaining the correct papers to travel to some parts of the Far East is now so complicated that it has put off many holidaymakers, whilst some regions in Europe have withdrawn from visa cooperation meaning extra paperwork is required to visit certain cities.

International trade is lower and protectionism is much stronger in this world of moderated, regionalised globalisation. Costly oil and uncertain resource supplies mean supply chains are shorter and international migration is more tightly confined to regions.

Unprepared destinations have been battered

Although the forecasts for climate change were relatively clear, many destinations failed to prepare adequately and the knock-on impacts and security implications have been dramatic. Sea level rises, increased flooding and more frequent droughts create physical barriers to visiting some places, but it is the human problems of food shortages and malnutrition, malaria, and conflict over scarce resources that create the greatest obstacles.

The global population of 8 billion people has created huge pressures on food and energy. Nearly 2 billion are living in areas of absolute water scarcity. Large scale movements of populations have created big social challenges, and tourism is an 'adventure activity' for only the bravest in the worst hit areas: the Sahara to the Middle East and Central Asia, sub-Saharan Africa, South Asian waterways and Small Island States.

Some destinations that once welcomed British tourists, like the Maldives, Dominican Republic and The Gambia, have found the changing climate too much to handle alongside the intense pressure on local resources like water, land, timber and fish. The collapse in visitors has shattered local economies, causing further environmental catastrophe as populations are forced to ransack natural resources – as with the boom in illegal logging – just to survive.

In the Middle East and Africa, water wars have been particularly violent. Famine and drought continue to pose massive problems in ever more places. Across the world,

political unrest has fuelled instability and governments are struggling to maintain control, particularly in areas with large displaced communities. This has disrupted tourism: recent rioting over food supplies in South Asia has caused a sharp drop in visitor numbers. Always-on communications that instantly transmit the news in vivid video to UK consumers make such experiences even more alarming.

Europe has changed

Hotter summer temperatures make southern Europe more uncomfortable. Heatwaves, flash flooding and malarial outbreaks continue to put off many visitors and make people much more picky about where and when they go. Competition for hotel rooms, compounded by new restrictions in some areas, has driven up prices. Air routes are more crowded and costly for operators.

There has been a marked decline in the popularity of winter sports. Snowlines have risen and the seasons shortened with severe economic consequences for these communities.

Travel is highly selective

The mindset of the UK holidaymaker has changed. Looking out on the world, many in the UK have become more fearful, less curious and more sensitive about their travel.

The idea of holidaying abroad is still attractive, but British visitors are highly selective in where and when they go, and they seek out large amounts of information in advance. They may want to avoid a particularly dangerous time of year for weather events, or refuse to travel on

a certain form of transport that's perceived to be more risky. But not everyone shares the same views: perceptions of risk are complex and very personal.

When people do travel to far-flung places, the journey is generally long and frustrating. Recent bio-chemical attacks have led to intense security, long queues and mind-boggling bureaucracy across the world. Travel is no longer seen as relaxing but as a time-consuming burden.

Once there, the experience frequently disappoints. Poor management of key resources, energy blackouts, expensive food, clear exploitation of workers, and endemic poverty all make people think twice about returning. The pockets of well-managed destinations that acted early are heavily in demand.

Some voice concerns that going on holiday makes the world's problems worse: saturating destinations; destroying sensitive environments; encouraging appalling working conditions; contributing to climate change; and leaving few real benefits to local communities. The case for the real economic and social benefits to host destinations has not been made; instead, stories of child labour and low wages in hotels and on tours regularly feature on the news sites.

Holidaying in the UK is more common, as it is in the more easily accessible and familiar parts of Northern Europe. The warmer temperatures in these safe areas are an extra attraction. When people do venture further, English-speaking countries are favoured.



A small number of highly popular locations are feeling the strain

Many destinations are still able to welcome visitors, concentrating large numbers in a few locations. The stability of countries like Canada, Denmark, Uruguay and New Zealand pulls in massive numbers of visitors from their respective regions.

The new middle classes of the East aspire to save up and travel to see the 'Old World', still perceived as relatively safe to visit. Today, 100 million Chinese tourists travel overseas each year, and popular cities and resorts are feeling the strain. India's 50 million global tourists are particularly keen to see the sites made famous in recent Bollywood films – from Los Angeles to Tokyo.

This influx has crippled the infrastructure and put off British visitors. 'They're not how they used to be,' is a common complaint from Brits who holidayed in these places in the early 2010s. Media reports of resorts being 'overrun' and 'trashed' by tourists have had a dramatic effect on their popularity with other holidaymakers.

From 'rip-off meals' to deliberate forest fires, visitors are increasingly noticing the impacts of mass tourism and questioning the consequences of their own travel.

Surprising technologies remove the need for some business travel

Impressive advances in communications technologies offer an attractive alternative to some business travel. Today, leading businesses view online meetings as more convenient, more efficient, more sustainable and above all more cost-effective.

The change began with businesses in the 2010s. Larger firms, looking to cut costs, began to strategically replace long-distance travel with telepresence services. Users could sit in front of a crystal-clear screen and view a three-dimensional image of a colleague, keep eye contact and converse as if in the same room. This caused a small drop in business travel on certain long-distance air routes, beginning with London to New York, and over time has closed many once-affordable routes to holidaymakers.

The latest innovation is the 'virtual window', where another household or landscape can be beamed into your home. Some families separated by thousands of miles can 'share dinner' together. Research teams are now looking into haptic technologies whereby individuals can share senses such as touch – a step closer to making the virtual handshake or kiss a reality.

No-one believes that these technologies will ever fully replace 'real world' contact. But the ability to supplement regular face-to-face meetings, or live apart for longer without that extra flight, has come as a surprise to many.



the UK outbound travel and tourism industry

The UK's travel and tourism industry has tried to evolve to cope with this challenging and uncertain world. Much of the industry focuses on getting higher value from smaller numbers of visitors. However, the challenges have been immense and there has been mass consolidation.

Long-term planning is very difficult; flows of visitors are fragile and often appear highly unpredictable as events unfold. Access to key air routes is disrupted by conflict; piracy attacks on cruises are much more common; key resources such as food and energy supplies are subject to erratic price spikes; and repeated safety failures across many different forms of travel perpetuate a climate of fear for travellers. The resultant new legislation, checks, restrictions and monitoring further burden the process of travel, inhibiting movement and making people think twice about holidaying. So far, the industry has failed to 'bounce back' from a series of crises and make the case for travel.

Customer Priorities: selective safety and lots of information

Customers are highly selective in where and when they travel and how they get there. Movement within regions is much more common than long international journeys. Holidays are sold on the basis of protection, safety and stability. Avoiding natural disasters, crime and political instability are amongst the key concerns for where and when people holiday in unfamiliar places.

The high-end market is particularly keen on isolation from the outside world and its problems. Larger, walled resorts that allow visitors to forget what's beyond them are popular as people seek calm escapes. Security guides – a tour guide with a military background – are often hired as part of a holiday package to help keep safe when travelling overseas.

Once they've found a good place, holiday-makers want to stay for longer and go back time and time again. People listen to word of mouth in this complex world, taking advice from others but seeking a personalised travel experience.

Above all, customers are used to and value lots of accessible information. For example, British visitors are particularly interested in the working conditions of those abroad. The media coverage and public debates over tourism's impacts have made all this essential. Customers routinely boycott areas employing child labour or offering poor wages. This discerning interest applies to environmental issues too: a 'zero-carbon hotel' is no longer a niche interest – it's an essential requirement for many British holidaymakers who take environmental issues more seriously now they can see the impacts.

Tour operators provide clear safety and sustainability advice, and visitors follow it closely. Websites offer prospective visitors detailed audit data on the credentials of hotels, restaurants and attractions. Customers are much more familiar with the social and environmental impacts of travel;

they are interested in how well local people are being paid and treated; whether local food and resources are used and managed sustainably; and how much of their cash stays within communities.

A major focus for the industry is customer loyalty combined with hand-picked itineraries that meet complex and overlapping needs. For example, a young family's combined work-leisure trip might demand telepresence technologies, 24-hour childcare facilities and guaranteed minimum waiting time at travel ports.

The sector that's booming: 'Doomsday Tourism'

One sector that is prospering is 'doomsday tourism', where affluent visitors rush to see fast-disappearing or threatened attractions. The melting glaciers of Patagonia, the disappearing snow cap of Mount Kilimanjaro, the vanishing islands of the Pacific, and the bleached corals of Australia's Great Barrier Reef are a particular sell. UK holidaymakers are developing a desire to visit the sites that the world is losing forever.

But there are big risks with such tourism and the impacts of large visitor numbers are increasingly being felt. There was recent uproar after a self-styled 'Climate Catastrophe Cruise' lost power in the Antarctic whilst viewing glacier degradation and left 7,000 passengers stranded.

Consumers are increasingly recognising a tragic irony: the large numbers rushing to see a fast-disappearing attraction or a truly unique culture are accentuating the problems. Environmentalists have begun massive campaigns to put visitors off going to these precious sites.



the holiday journey 2023

Solo traveller

Mark considers himself an ambitious traveller. Perhaps not as ambitious as his father, who once told him he flew to Thailand twice in a year, but he's still keen to see the world, despite being acutely aware of the risks. The big attraction for Mark is to see places he's heard about that might not exist when he's older. This year, he's going to visit glaciers in Canada. Whilst he's there, he's going to make a trip to the USA – if he's bothered to do all those security checks to get there, he might as well stay for a month.

The 'Doomsday Canada' video looks like the perfect trip – three weeks of melting glaciers, declining fish stocks, eroded landscapes and battered coastal communities that, the brochure only half jokingly assures him, "won't be there next year!" Apparently, if he pays a special supplement, he can also get a boat to visit a remote part of Alaska that tourists haven't been to for almost three years.

Family holiday

The Lowen family are pretty picky about their holiday plans. With a young baby, they are definitely keen to avoid the lengthy security delays associated with any long-distance travel. And they tried going back to the Mediterranean last year, but the sweltering summer heat and vast numbers of other tourists meant that it's not how it used to be: barely a sandy beach left and the power cuts and water shortages proved a massive inconvenience. So instead, this year they've opted for a three-week

excursion around Ireland. The tailor-made itinerary seamlessly integrates their requirements: baby care needs; digital links for John's work; and guaranteed water supplies for the whole trip.

Retired couple

Barry and Adella are approaching retirement, and were thinking about going on a three-month trip. But all the stories in the news, from the health scares on cruises to companies going bust and stranding holidaymakers, have put them off going too far. So they've chosen a two-week trip by boat and rail around the tranquillity of Scandinavia. Simple security and safety are what sells it for Barry and Adella. But that doesn't mean they can't be active: the simulated 'white water rafting' in the hotel pool is a huge hit – just like the real thing, but fortunately not as dangerous.

destinations

The fortune of destinations is something of a lottery. Some have prospered in the sense that more and more visitors have been attracted, concentrated into small pockets of affordability, safety and security. But many others have collapsed under the combined weights of more visitors, devastating climate change, violent and regular conflict and crippling resource shortages.

Certain areas that were unprepared for inundation or failed to manage it adequately have destroyed the very attractions people were coming to see. Once popular destinations have tumbled off the list of must-sees for British holiday-makers as a result: Kenya's Masai Mara, Peru's Machu Picchu, and Ecuador's Galapagos Islands have all suffered from eroded attractions or self-imposed restrictions.

In other places, local communities have reacted angrily to the influx of visitors. The residents of one formerly popular European resort recently sued the local government for gross neglect after growing volumes of tourists destroyed the local sandy beaches. British tour operators routinely blacklist such locations, further concentrating demand in smaller numbers of places.

Innovative but patchy responses keep tourism alive

The response to new challenges in destinations has been patchy, and a lack of coordination internationally has hindered success. For climate change, adaptation is the main priority after the collapse of international climate change negotiations

in 2015. Revenues from tourism are re-invested in protective schemes, in a desperate attempt to defend a key source of income from rising sea levels, drought and extreme weather events. But for some, this comes too late: the government-run Tourism Fund in the Maldives has begun relocating residents to the 'insurance land' in India due to the relentless rise of the sea.

Businesses and local governments have stepped in with innovative responses. Local authorities in Spain have pioneered a water levy for holidaying in water-stressed areas, with the proceeds re-invested in water efficiency measures and advanced desalination plants. One tour operator has set aside a train carriage to carry water alongside holidaymakers to Barcelona, dubbed the Hydro Express. More arid conditions mean that some operators are promoting golf and skiing on sand as the new 'hot' activity.

Governments have sold off key resources such as water, energy or cultural sites to businesses in order to secure capital to maintain them. Some travel companies have bought into other sectors, like the large tour operator that runs the water network in one part of Turkey.

Sponsored heritage is one favoured way of trying to showcase ancient attractions whilst managing them sustainably. The Eiffel Tower was recently auctioned off to a large corporation – which now demands royalties whenever the image is used around the world.

Managing numbers is an economic imperative

In places of over-development and environmental destruction, rationing is the new economic imperative. The 'scarcity of place' across the world means that numbers need to be restricted by price or barriers. The 10-year waiting list for the Galapagos Islands' fragile ecosystem makes it particularly attractive, but almost impossible, to visit.

Similar tough quotas protect other threatened sites and this sends prices sky-rocketing. Destinations charge a premium for the scarcest resources, making some of the most iconic attractions in the world, such as the Giza Pyramids, completely unaffordable for many British visitors. Many of UNESCO's World Heritage sites charge a high levy for entry or have restricted visitors to distant 'observation platforms'.

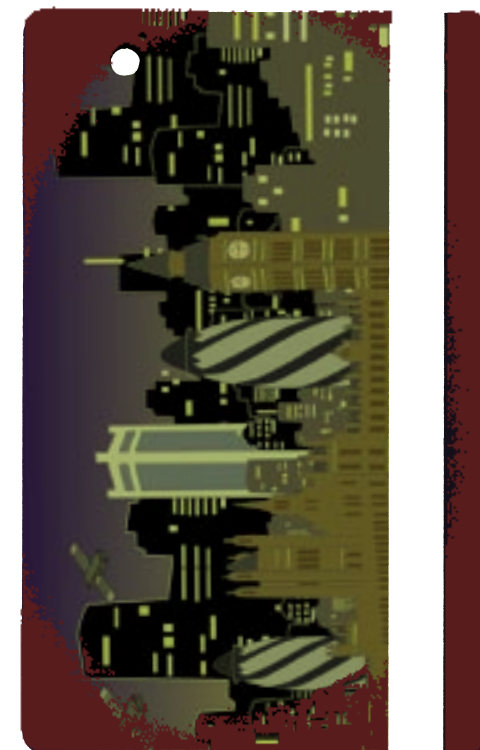
In other areas, tourists have been banned for their own safety. From the suffocating heat in the Australian outback to the criminal gangs in a few European cities, tourism has become a perilous activity in destinations that were familiar to British holidaymakers only a decade ago.

In other areas, particularly those with an inundation of tourists, racism and xenophobia are on the rise. Tensions in some areas run so high that tour operators are working with local authorities to routinely stagger or segregate visitors according to nationality.

Some local politicians have begun anti-tourism campaigns. The far-right

Mayor of one major European city, repeatedly flooded by rising water and trashed by demanding tourists, has been elected on a promise to impose strict limits on the number of foreign visitors each year. Others have banned them outright in a movement known as 'post-tourism economic development'.

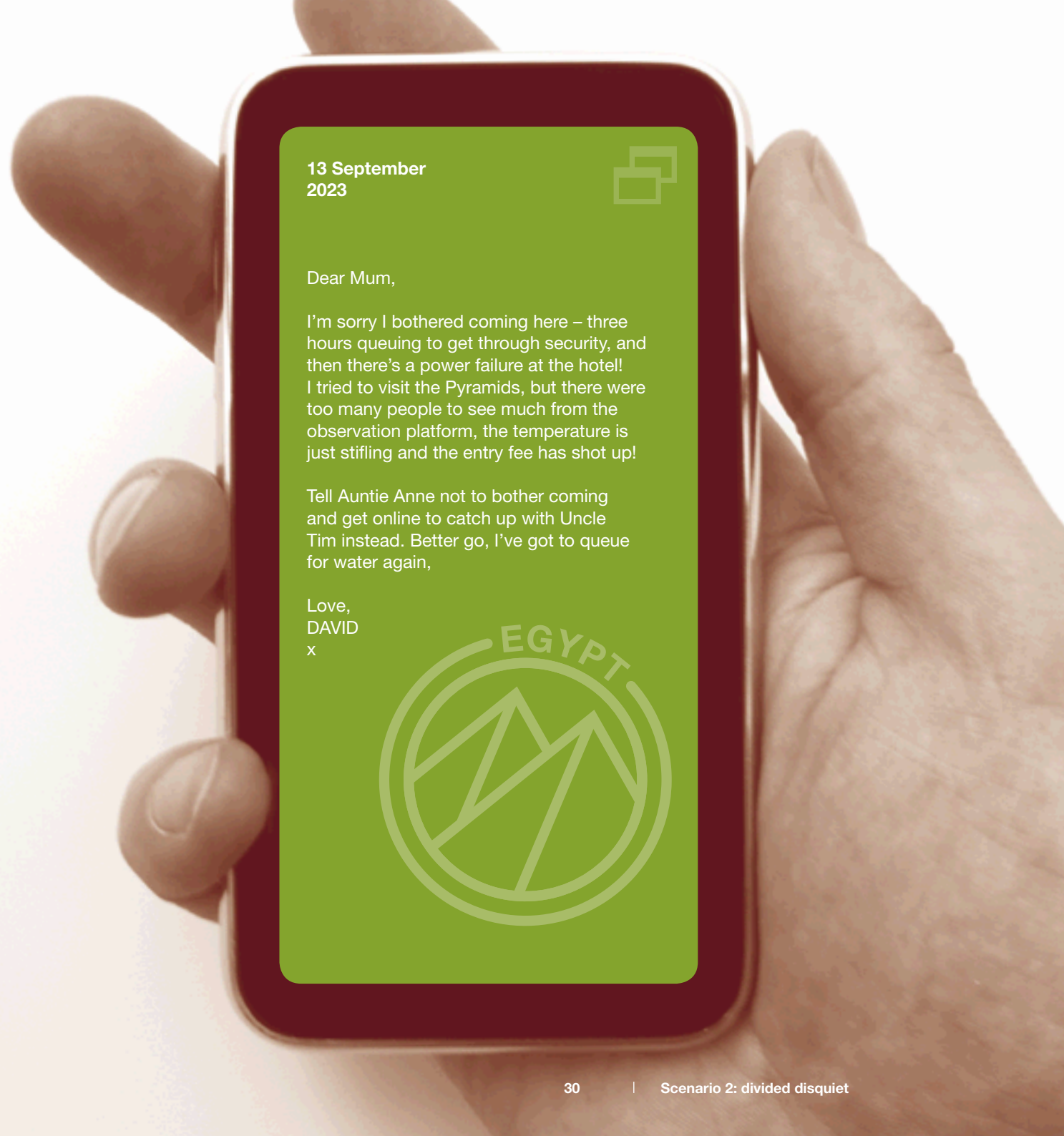
Ghost resorts are all that remain in the worst hit places. These abandoned destinations are left with destroyed reefs, beaches polluted beyond repair, land parched by drought – and a devastated economy that once relied on tourism.



fastest growing holiday destinations for UK visitors



- | | |
|----|-----------------------------------|
| 1 | Norway |
| 2 | Ireland |
| 3 | Latvia |
| 4 | UK |
| 5 | Greenland Doomsday Park |
| 6 | Canada |
| 7 | Denmark |
| 8 | France |
| 9 | Sweden |
| 10 | The Estonian Army Base Experience |



13 September
2023



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
x





6. | scenario:

3.

price and
privilege

A dramatically high oil price has made travel punitively expensive. Cost is the primary concern for holidaymakers as everyone asks: how far can I get for my money?

Although a small, elite market continues to fly regularly, the vast majority of people simply cannot afford the experience. There have been mass redundancies across the travel industry and the affordability of overland routes has led to radical restructuring.

how we got here

- 2010** • Oil companies lead a stock market recovery as International Energy Agency announces supplies are unlikely to meet medium-term demand.

- 2011** • Railteam announce a “new era of overland travel options” as open access to the Channel Tunnel for rail operators reduces the average price of rail tickets to France significantly.

- 2012** • A poll reveals that the UK population would rather not buy new clothes for a year than give up their summer holiday.

- 2013** • Accelerating global growth sees an early spike in oil price, with devastating impacts on food production. Super spikes continue for many years, with increasing severity.

- 2014** • Major commercial biofuel flight crashes just after take-off in front of VIPs and the world’s media. A growing pressure for land for food crops causes many industry insiders to forecast an end to biofuel research for aviation.

- 2015** • Boat from London to New York is cheaper than flying for the first time since 1969.

- 2016** • Mass redundancies in the aviation industry amid new wave of travel acquisitions, mergers and bankruptcies. Demonstrations and petitions in several cities worldwide over the ‘right to fly’.

- 2017** • Sails successfully trialled on large cruise ships – with little loss of space and significant fuel savings.

- 2018** • British entrepreneur expands her electric bus point-to-point travel business into Europe.

- 2019** • Video story in the media on the holiday choices of the World’s 100 richest people reveals, to the surprise and outrage of many, that they still fly on average 18 times a year.

- 2020** • All trips to Europe become cheaper by train than plane, without exception.

- 2021** • Tourism workers across the Mediterranean region unite in mass protests against poor wages and working conditions as a result of cost pressures.

- 2022** • A major US-Chinese joint investment programme is announced for aviation research and development for the post-oil economy. The first trials begin for blended wing aircraft.



the world in 2023

High oil prices and a slow response

Travel is expensive today because the cost of oil has skyrocketed. As the world economy lifted out of recession in 2010, prices climbed upwards as energy demands grew. Rising demand from the strong economies of Asia pushed energy prices into a series of sharp and unpredictable spikes. With hindsight, the oil price spike of 2008 is looked back on as a meek forerunner of the more severe impacts to come.

New supplies have not been forthcoming and technologies have failed to keep pace with the change. Despite the promises from oil companies, very few new oil fields have been discovered and formerly dependable reserves are perilously low. Easily accessible supplies are a thing of the past.

It is now widely accepted that ‘peak oil’ production was reached in the mid-2010s. This has led to a significant shift in views on energy. Everyone now knows that oil is inexorably declining; there is no option but to reduce travel or achieve substantial efficiency improvements. The global economy has fluctuated wildly over the last decade as the high oil price has risen, then pushed down demand and prices, then recovered and pushed prices up again. Prices have stabilised now as more efficient options come on line and the world comes to accept lower levels of growth.

The travel industry worldwide has been particularly badly hit as it continues to struggle to find viable alternative fuels. Aviation has shrunk considerably as it proved unable to sustain. Fleet replacements

have been far slower than anticipated, and the predicted efficiency gains could not keep pace with rising energy costs. There have been mass redundancies across the travel industry and a period of dramatic consolidation internationally.

Cost-sensitive consumers demand the 'right to fly'

Travelling overseas is hugely fashionable today. In fact, it's more desirable that ever as it's seen by many as a 'once in a lifetime' opportunity.

But cheap, mass air travel is a thing of the past: flying is viewed for most people as an extraordinarily special experience. People save up for years to fly overseas for special events such as honeymoons or visiting friends and family. Because it's so expensive and people have saved for so long, the flight itself is treated as a very special occasion. Friends and family come to wave you off, and many choose to dress up in their best clothes to celebrate the day. 'Taking-off in a plane' was rated amongst the top ten experiences that teenagers craved in an online poll in 2022.

There is a longing for a return to the days when flying to New York on a whim was possible; a nostalgia for the memories of affordable travel. Conversely, holidaying at home in the UK is seen as naff. Despite the obvious cost benefits of not having to travel as far, the domestic market has suffered from a sustained lack of investment.

Some people express anger and frustration at the failure to adequately plan in the UK but this is particularly evident in the new economies. Both government and businesses have been accused of disgracefully wasteful policies in earlier

years that have denied the next generation the 'right to fly'.

Under immense pressure from voters, governments across the world are scrambling to invest in funding research and development to get the aviation industry back on its feet.

Although carbon-pricing legislation has been introduced, the oil price spike has made politicians shy away from strengthening it. People in the UK are much more educated about climate change and aware of the impacts, but they don't feel its real relevance to them. Instead, energy efficiency is the primary, overriding concern that dominates discussions on building a post-oil economy. Investment in renewable energy – harnessing the 'free' resources of the sun, wind and waves – is naturally the subject of priority projects and emergency investment.

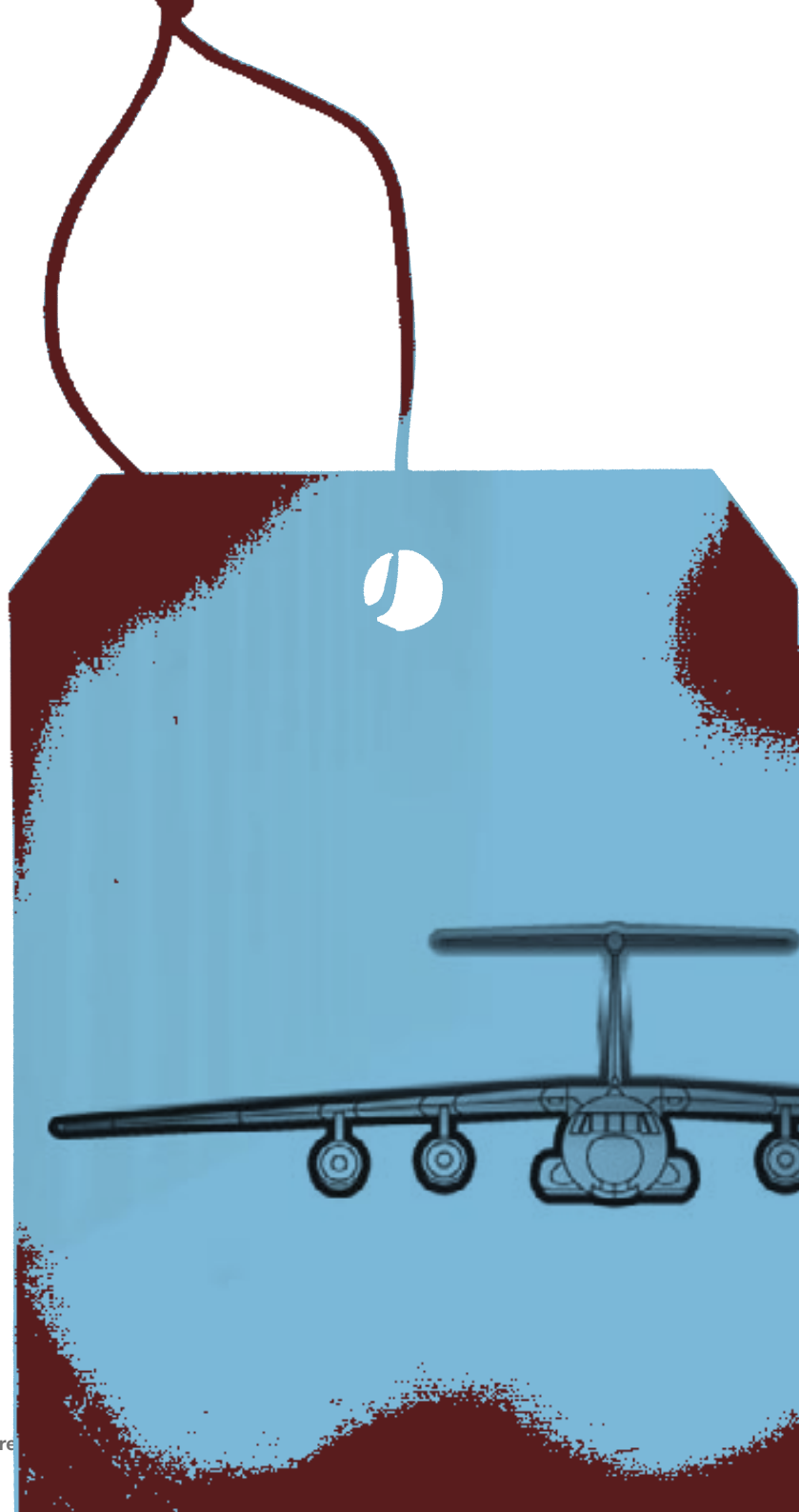
Overland travel is the only cost-effective transport

People who want to holiday abroad face a stark choice: save up for years and fly overseas; or join the new mass market of overland connections.

The travel industry is rapidly investing in harmonising pan-European infrastructure alongside more fuel-efficient transportation by land and sea. There have been significant investments and subsidies for electric transport and other low-carbon options too, which has staved off oil shocks to some extent.

Investment in rail has focused on increasing consumer choice and improving timetables to ensure that routes across Europe are seamlessly connected. There have been significant improvements in the 'on-board'





experience, from child-friendly facilities to in-seat entertainment that continue to attract users.

All-inclusive coach and rail package holidays to mainland Europe are extremely popular, particularly with young families, where the kids' facilities en route are second to none. Special provisions have also been made for the elderly and frail to travel in coaches that are more accessible and spacious. Advanced satellite navigation systems, intelligent speed limits and comfy facilities have made this highly competitive market much more reliable.

Car sharing and car swapping holidays are also popular across Europe, with an easy online service that allows users to compare fuel efficiencies alongside cost, then pick up their car from another user's house.

A hub structure has developed to promote efficiencies

Existing airports, sea ports and railway stations are being upgraded and refurbished to act as hubs. They may offer a small selection of flights alongside a vast network of high-speed rail, coach and ship routes.

Across Europe, modern, out-of-town coach hubs have sprung up close to major motorways. These are often owned by one large company, which sells slots to bus operators, shops, restaurants and energy companies to recharge the buses. They compete for passenger traffic by offering the most pleasant meals, rest zones or parkland walks.

The popularity of hub networks has changed the geography for everyone, with popular tourist attractions like theme parks,

gaming zones and museums flourishing closest to major roads.

Most forms of transport are seamlessly integrated as customers buy one ticket and check in their baggage only once. Personal communication devices allow most people to alter their plans on the move and track where their bags are at any given moment.

Local authorities have been aggressive in tackling congestion problems on the most popular routes, but frustrating delays continue to ruin some holiday experiences. Germany recently introduced an 'electric lane' on the Autobahn for the exclusive use of battery-powered shuttle buses, a plan that the European Union looks set to recommend for all strategic routes. Meanwhile, the Ukraine has carefully positioned itself as the 'Gateway to the East' through its Kiev megahub development plan.

A restructured economy

High oil prices have had an impact on all aspects of day-to-day life. Food and clothing are more expensive than they were in 2009. This puts extra strains on household budgets, and means less disposable income for holidays. The cost pressure faced by businesses – desperate to deliver low costs in a fiercely competitive market – means that low wages in the travel industry have to be spread even more thinly.

Across the world, supply chains are shorter than they once were; the rate of growth of international mobility is slowing; and industry location is more important than ever. Businesses have to locate closer to markets: sites close to waterways, rail or other major transport hubs command a price premium that was once reserved for proximity to airports.



the UK outbound travel and tourism industry

Aviation

Because flying is completely unaffordable for all but the wealthiest, the airline industry has restructured to focus almost entirely on the long-haul, elite market.

The industry failed to develop technologies that could keep up with rising oil costs. With a growing worldwide population and so many more mouths to feed on the planet, food has won out in the biofuel versus food debate. Fleet replacements were much slower than anticipated and the predicted efficiency gains did not materialise. No-one has been able to develop a viable alternative to kerosene fuels that can be produced in large enough quantities.

Bankruptcies, consolidation and redundancies have dominated the last decade. Some alternative air travel options are beginning to emerge and government-led investment is massive. Although one small tour operator is running a fleet of airships, this is not yet viable at a larger scale.

One remaining airline is pioneering a highly innovative model to offer cut-price tickets to the mass market. Passengers need to travel by rail to outside of the European Union, where different health and safety standards allow a new class of ‘absolutely no frills’ flying based upon cramming as many passengers aboard as possible. These use larger jets; there is standing room only; no cabin crew or food or drink are provided; and passengers are charged by the bag (including hand luggage) and according to their own weight (making it less affordable

for the 40 per cent of UK males who are obese). This strategy is having mixed success and has so far proved unable to significantly offset the higher fuel costs to offer an effective model of affordable air travel.

Shipping

Higher oil prices have also hit shipping. High-speed ferries have been a noticeable casualty and cruising has become much more expensive. Shipping is switching to Liquefied Natural Gas for cruise ships and large ferries, which has also had emissions advantages in environmentally sensitive areas.

Some smaller, high-end passenger ships, as well as some larger vessels at sea, are using sails as a cost-saving measure.

Customer choices and the importance of price

Most people cannot afford to travel long distances and consumers are extremely cost-sensitive. Price is the primary determinant of all but the shortest journeys as people struggle to find the cash to move. Cheap ‘all-inclusive’ holidays are extremely popular as a cost-effective means of getting and staying abroad.

Some large tour operators have bought their own rail and coach companies. All the major tour operators charter trains to Europe and beyond and offer integrated overland travel packages. Every connection is taken care of as businesses compete to score best in the key categories: cost, speed, ease and

comfort. Today’s customers hear stories of the old days where British rail travellers would lug their baggage across Paris, and wonder why they ever bothered.

The industry’s overriding focus is on providing cost-effective transport, and that frequently means fuel-efficient mobility. Planning is extremely difficult as oil prices have been so erratic – and some companies have made spectacular losses by hedging incorrectly.

Group discounts and holiday saving clubs are the norm as agents are heavily incentivised to operate full trains, coaches and ferries. To help people afford a holiday, some banks offer their customers special ‘holiday credit’ schemes. These lines of credit are earmarked for an annual holiday, often tied to a travel or insurance deal, and repaid before and after the trip. Some pioneering tour operators have begun running holiday saving clubs – where friends and family save together to go on holiday abroad, each contributing monthly – with a promise of group savings and holiday extras thrown in. Holiday insurance is also selling well, as people can get a full refund if, for example, their child is too unwell to travel on the big day.

The high-end market: a new elite

A new class of ‘super exclusive’ holidaying has been firmly established in the high-end market for a super-rich minority who can afford to fly regularly. These brands are a separate entity, unheard of by many of the general public.

The travel experience is totally different from the ‘absolutely no frills’ sector. For this elite market, personalised excellence and the highest global standards are always expected.

These costly holidays are always tailor-made: private tours by personal jet are popular, with travellers choosing to land where they fancy going that day. For example, one company offers to fly wealthy customers from the UK for a lunchtime picnic in Scandinavia or to an overnight ‘Boutique Air Hotel’ for breakfast in Shanghai. Far-flung destinations that can only easily be reached by air, such as the Indian Ocean islands, invest all of their marketing budget in competing fiercely for this tiny but lucrative market.

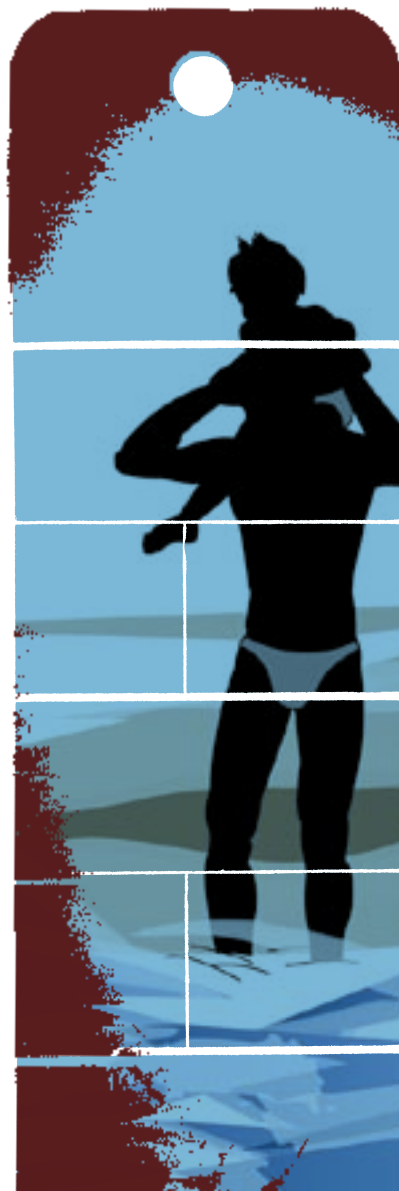
Mega consolidation

The UK’s outbound travel and tourism industry has gone through a period of mega consolidation – vertically and horizontally – in order to survive. People trust in big brands to deliver them a cost-effective holiday. A major UK supermarket now offers its network of travel buses and cheap package holidays that can be booked online or in store. Shoppers can put loyalty card points towards holiday savings.

Those controlling energy supplies are in a position of immense power. One of the world’s largest oil companies recently launched its own airline and travel company, Crude Holidays, claiming it was an altruistic venture to lower downstream costs and keep people flying.

Consumer groups claim that this increased consolidation has ultimately led to less holiday choice for most travellers. Some holidaymakers are also beginning to

question whether they are really getting value for money. Tour operators are responding with philanthropic initiatives to support low-income families to travel abroad. One UK charity is funding overseas holidays for deserving families that the public can vote for in a popular online show.



the holiday journey 2023

The solo traveller

The invitation for the wedding arrived 16 months early. Anna was excited, and absolutely desperate to go to her brother’s big day. But the only problem is that he moved to Australia ten years ago. She definitely won’t be able to afford an airfare so she’s arranged with her employer to roll two years holiday into one and take a three-month break to make the journey overland. Anna’s booked through one of the many online integrated travel portals, and paid her supermarket in advance for the entire trip. Most of her accommodation along the way will be on the exciting sleeper trains, coaches and ships that provide surprisingly decent accommodation while on the move. She’s arranged accommodation in advance in the places she’ll be stopping on the way – all offered for free through a popular social networking site. Important cost savings for that wedding present!

The family holiday

It’s been 18 months of belt-tightening for Dave and Kate as they’ve been saving for their overseas Easter holiday. The day finally arrived and the family set off on their SunRail break to Spain with the kids bursting with excitement. Kate found a brilliant saver deal through their favourite coffee shop chain, with a group discount that caught her eye. They’ve spent a lot of time rallying a group of good friends to join them for the deal, and many are also bringing their parents along too. There are five family groups going along in total – 16 adults and 11 kids. Each family has been contributing to the holiday account

for the last year. And those extra coffee loyalty vouchers will give them special savings in the resort too. SunRail was the obvious choice because of its great reputation for kids facilities on the way to the resort – definitely a bonus for the 14-hour trip ahead with the overexcited youngsters.

The retirement trip

The McNicolls are looking forward to another a week-long break on a remote tropical island. Since retiring from the oil industry, Andrew’s been able to get away more. He rang his personal holiday consultant, Julio, a few weeks ago when Judith complained her real tan was beginning to fade. They’ve chosen their favourite resort, Paradise Bay, where the welcome and eight-star luxury service makes them feel like royalty. They’ve tried other resorts in the past but nothing quite came up to scratch. Judith’s looking forward to dressing up for the flight – she’s hiring a diamond necklace and the travel consultant has arranged for it to be ready for collection at the airport. They can’t take any luggage on the flight but it doesn’t matter – Paradise Bay will literally have everything they need.

the destinations

A radical restructuring of destination popularity

High energy prices have resulted in significant changes to the popularity of destinations. Those once reliant upon cheap, mass market air travel have collapsed, whilst others that are accessible by road, sea and rail are prospering. As a result, resorts along major overland routes and closest to mega hubs across Europe are becoming overcrowded.

Many British holidaymakers want to get as far as they can to feel exotic, but still get there cheaply and easily by land or sea. This has made the beaches from Montenegro to Morocco popular. But because transport is so expensive, others are prepared to take time to travel further if the costs are lower once they get there. Countries like the Ukraine and Mauritania have capitalised on this trend.

Far-flung destinations that don't have wealthier visitors to support them or that have no rail, sea or road links to their key markets have been hit hardest. Their only hope to retain their tourism industries is to compete heavily for the small luxury tourism market. Australasia has set up elite privilege cards to attract high-net-worth individuals with exclusive access to government buildings, endangered sites and luxury brand offers.

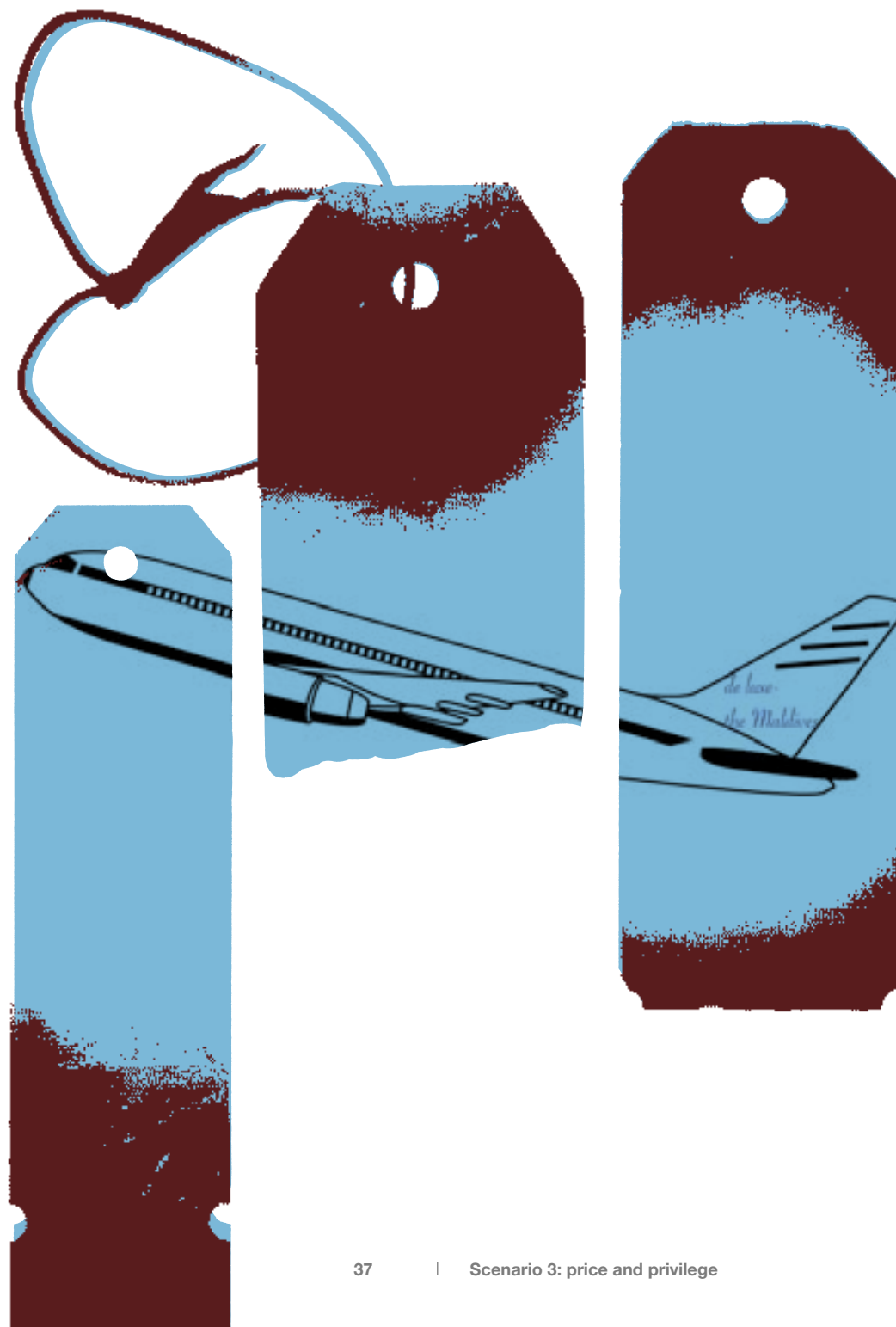
Cost saving – at any cost

Once abroad, it's essential for most people to stay as long as they can to make the most of the experience. Getting anywhere is expensive, so most destinations work extra hard to make holidays in their region more affordable. Managers have found that 'low-carbon' measures, from energy efficiency to renewable power, offer one of the few ways to offer an affordable experience.

But 'low-carbon' holidays are not marketed as a green niche, they are sold as the cheapest option that makes simple economic sense. The high costs of transporting food and building materials mean that buying local is also a major trend to save costs.

But the pressure to offer cost savings means margins are low in destinations. Resorts are built as cheaply and with as little waste as possible, but equally with little regard for biodiversity conservation.

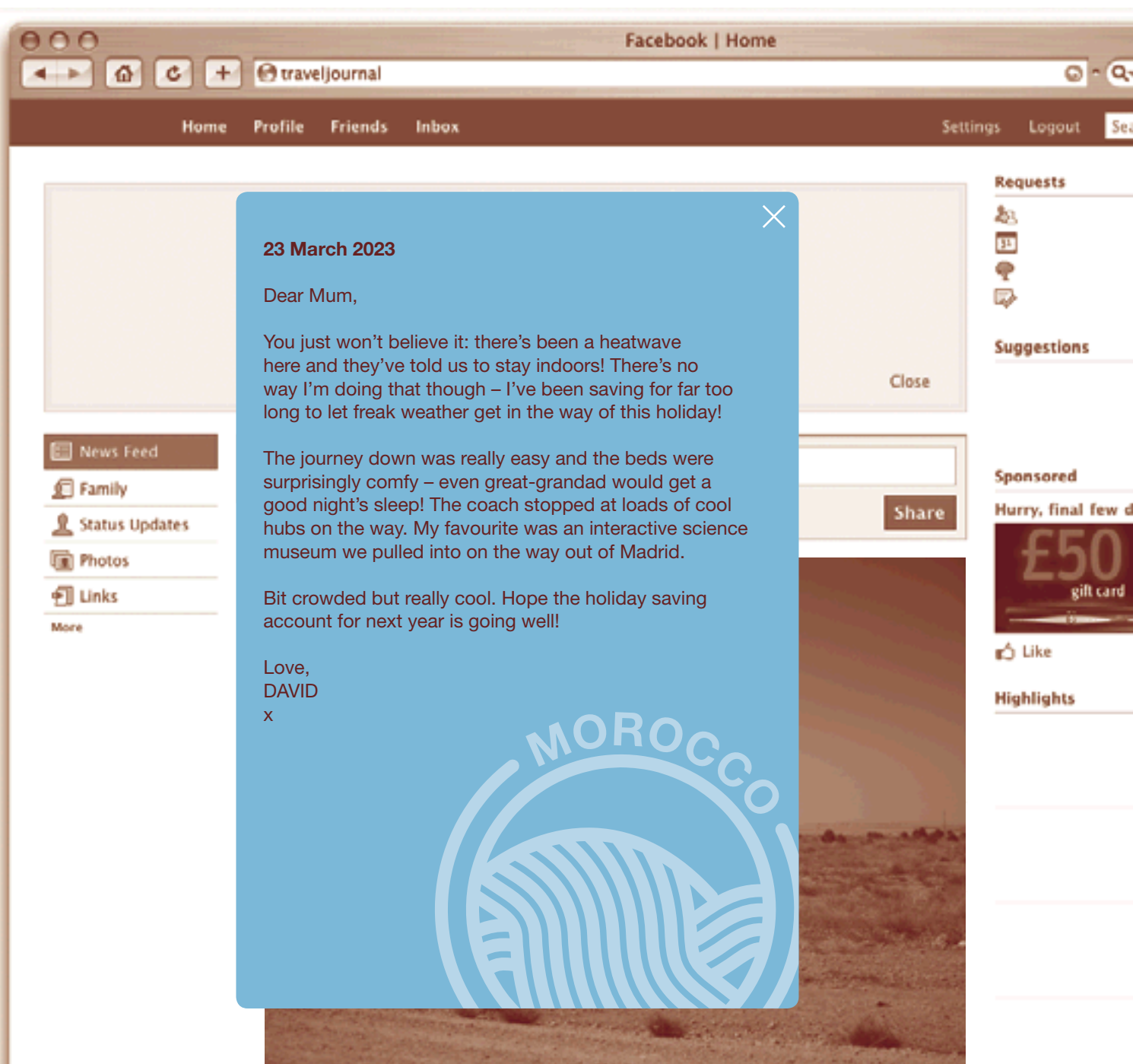
Very little has changed for tourism workers over the last 15 years. Wages are often below a country's living wage. With the focus so firmly on cost-saving, tour operators routinely turn a blind eye to problems and go out of their way to shield holidaymakers from poverty in destinations. There are few excursions offered outside all-inclusive resorts unless they are carefully managed. Concern is also growing for suppliers, who are being squeezed to within breaking point. With less competition, there are fewer options, and travel companies can dictate what they pay. As a result, few of the economic benefits of tourism actually reach the local communities that host resorts, leading to rising tensions in many places.



fastest growing holiday destinations for UK visitors



- 1 Montenegro
- 2 France
- 3 Lithuania
- 4 Portugal
- 5 Germany
- 6 Central Europe
Lakelands
- 7 SailRail breaks
to Greece
- 8 Morocco
- 9 The Tropical Island
Experience (Jersey)
- 10 Ukraine





7. scenario: **carbon clampdown**

4.

Tradable carbon quotas have been introduced for all UK households as part of the government's bold plans to tackle climate change. The public has clamoured for tough action as environmental impacts are increasingly felt.

Holidaymakers are highly sensitive to the impacts of their travel and seek ethical experiences that are within their carbon budget. Holidaying in Britain is back in fashion and has soared in popularity.

how we got here

- 2010** • President Obama rallies the world in implementing ambitious new proposals from the Copenhagen Climate Change Conference.

- 2011** • Slow recovery from recession, but polls show consumer attitudes to ethical consumption are strengthening and thrifty habits are sticking.

- 2012** • London Olympics disrupted by storm surge overtopping the Thames barrier, leaving parts of Stratford underwater during the opening ceremony.

- 2013** • European Union expands carbon trading to cover a wide range of economic activity; UK Government procurement policy re-written to ban travel expenses being reclaimed for air travel.

- 2014** • Leading travel firm goes bust after massive boycott coordinated by social networks over its environmental policy.

- 2015** • Protests erupt across the UK over massive pensions deficits. Many retirees are left with much lower incomes than expected.

- 2016** • Biofuel projects struggle for cash as rising food prices are blamed on the 'costly and irresponsible experiment'.

- 2017** • Surveys reveal that the new carbon labelling of holidays is one of the most important selection criteria for a key segment of holidaymakers.

- 2018** • UK loses its opt-out from EU working directive. British Prime Minister declares 'General Wellbeing' as important as Gross Domestic Product.

- 2019** • Asset bubble recession hits UK. Government response focuses on investment in domestic tourism infrastructure.

- 2020** • Cornwall County Council converts three former jumbo jets into a hotel to cope with increased demand for accommodation in the summer season.

- 2021** • Tradable carbon quotas become law in UK.

- 2022** • Carbon rebate available at UK Customs upon proof of volunteering whilst on holiday.



the world in 2023

An ambitious new carbon regime

The UK government has led the world in pioneering tradable carbon quotas for every household. These are seen as the fairest way of allocating the 'right to pollute' equally. Carbon quotas are the government's flagship policy to reduce the country's contribution to climate change. And although the systems had their teething problems in 2021, other countries are now looking to launch their own schemes.

This regulation has had a dramatic effect on the economy as a whole, particularly on the costs of transport, domestic and corporate energy use. Inevitably it has also had a huge impact on the affordability of travel, both within, to and from the UK.

Public support has clamoured for action

Public support for regulation to tackle social and environmental issues is very high as so-called 'carbon guilt' has set in. Although there has been no great shift in cultural values, opinion poll after opinion poll shows that UK citizens are willing to make sacrifices to protect the environment for the future.

People are better educated about climate science and more informed about the impacts of transport behaviour. A combination of businesses, the media, politicians and NGOs have steadily increased awareness and shifted attitudes.

Public support has been particularly galvanised by changes in the way media is used. The growth of internet communications, with people permanently

connected whilst out and about, has driven a new type of peer-to-peer amateur journalism that connects people through communities to others with a story to tell. These personalised news reports have increased access to science and information and show suffering from around the world as the climate changes. Online communities play a critical role in rousing rapid support for boycotts, protests and campaigns for action.

It's clear that the UK is not immune from climate change, as the storm-surge disaster in the Thames Estuary in 2012 showed. The fear of what future climate change might bring has resulted in a groundswell of support for bold action. Young people today look back on the start of the century where people jetted off around the world as a time of decadence, shallowness and damage to both the mind and planet.

Most businesses have also been strong supporters of the tight regulatory regime, with a consensus that it sets UK plc up well for a global economy that will follow the UK's lead in due course.

A struggling economy with less money for holidaying

The UK economy has struggled since the recession of 2008–10. Although there was a mild recovery, new problems quickly resurfaced and instability returned in the later 2010s. Rampant inflation has posed particular problems and hampers long-term planning.

UK consumer disposable incomes are low as the costs of food and energy have risen. Householder savings are down and borrowing for both businesses and individuals is very expensive. Many people

have had to tighten their belts. The pound's weakness on the international stage means that exchange rates are unfavourable for overseas travel.

The crisis over national pensions in 2015 resulted in several large company schemes defaulting on their obligations. This has left many with meagre incomes in old age. The stretched 'grey pound' has been diverted to higher living expenses and costly medical care: chronic illnesses have created a heavy burden for many families as the NHS struggles to fund treatments for the ageing population.

But it's not all doom and gloom. The Office of National Statistics recently revealed its General Wellbeing Indicator has risen for the first time since records began. Experts debate whether this is down to today's better life-work balance or stronger ties in local communities across the country.

Global empathy, but a more localised economy

Initiatives to create a low-carbon economy have meant that many things are becoming more decentralised and localised, such as energy supply systems, local food networks and models of production. Some fear that the UK is becoming a more insular and inward-looking society, losing the dynamism and openness that characterised its success in the nineteenth and twentieth centuries.

But although the UK's economy is more localised, conscientious consumers feel more globally connected than ever before. People form strong emotional bonds within global communities online, driving much more interest in shared campaigns as crazes are unleashed from the restrictions of location. For businesses, this means

reputation is more important than ever. Although there is as yet no global scheme to price greenhouse gas emissions, governments across the world have accelerated initiatives to shift towards a low-carbon economy as a result of growing pressure.

Populations are united in their trepidation of how climate change will drive further suffering and instability unless something is done. But the positive lessons of a low-carbon economy – from more reliable sources of cheap renewable energy, to stronger and healthier local communities – have furthered this strong support. An awareness of the lives of others and a responsibility to act has fuelled a growing sensitivity to high-carbon transport and a boom in ethical travel.

The new mass market: ethical travel

Many British holidaymakers are still keen to travel abroad, but perceptions of the purpose and cost of travel have changed. Although distance is a key consideration, the purpose of the holiday is crucial: what you are doing is more important than where you are.

The quest for personal fulfilment, infatuation with wellbeing and high sensitivity to environmental and social issues has transformed ethical travel from a nice-to-have niche into a booming mass market. Customers are searching for richer, more worthwhile experiences and most holidays now offer an explicitly ethical aspect.

With a high carbon price for long-distance movement, customers are looking to save up their time and money to travel and really savour the experience when they're there.



Employers are obliged to support longer holidays with flexible working and time-off policies. Leisure time is seen as a much greater priority today than it once was: people don't just live to work, they work in order to live.

The longer time spent abroad means that contributing to local life in destinations is much easier, whether that's on the important wildlife conservation projects or timetabled trips to learn new exciting new skills. Those offering holidays work hard to prove the case for their validity, such as the popular Adaptation Adventures where holidaymakers have saved many lives through sea wall construction in Bangladesh.

The young are the most keen to experience different cultures, and long breaks by slower forms of travel are mixed with volunteering, offering rich personal rewards and great stories to tell friends. The journey time itself is often seen as an opportunity to learn, a model pioneered by one cruise company in the 2010s with its 'Living Better' sustainability experiences during the trip. For others, signing up to the UK Peace Corps is one of the most accessible means of seeing the world and doing interesting things for a couple of years.

The latest trend this year is the Red Cross initiative Swarm. Potential volunteers receive training and sign up to a waiting list specifying their available travel dates. When a natural disaster hits anywhere in the world, Swarm volunteers are contacted by the network to help with the recovery effort. The government offers a discount on any carbon costs from the travel. After recent flooding in the Dominican Republic, Swarm sent in 850 British volunteers from nearby islands within 3 hours, faster than any official agency staff.

A high cost of long-distance travel has meant that some people chose to stay abroad for very long periods of time. The appeal of immersion in new cultures is high, but the idea of the old 'round the world in six months' ticket seems laughable now. Instead, young people often take 18 months to ten years to go and work or volunteer as a part of one specific local community somewhere far away. Impressive advances in digital communications mean that those who want to stay in touch with family and friends back home can do so with ease. The older population is also taken by the attraction of today's slower pace of travel, but many lack the savings for long trips. When they do travel abroad, many opt for reverse-learning holidays. On these, visitors are taught traditional ways of living and adapting to the world's problems to take back to their communities in the UK. These might include conflict management in Bhutan, low impact living in the Ecuadorian Amazon, climatic adaptation in Somalia or alternative medicine in rural China.

Communities in the UK twin with those in the Dominican Republic or Gabon and exchange knowledge and services as part of the holiday experience, fostering regular exchanges over many decades. Schools encourage pupils to combine holidays with a week in a local school to share in the cultural exchange.

Peer-to-peer holidaying, where customers set-up their own experiences with individuals they've met through social exchanges, took off in 2016 and has grown steadily ever since. Today, instead of just swapping houses, families have literally exchanged lives, working at each others' companies, joining in with a new community and even taking up a place in the local college for the year.

Satisfied holiday needs – closer to home

Overseas holidaying is less popular today because high-carbon transport has fallen from favour. But there are also many positive reasons to stay closer to home where many of the experiences people seek on holiday can be found.

The UK is experiencing milder winters, and hotter, dryer summers. Once-declining seaside resorts are resurgent – not least because the government has focused investment on supporting job creation and infrastructure improvements within the UK. Holidaying across the British Isles is not only the most affordable option, it's also chic and ethically 'cool': international celebrities are frequently spotted on the beaches in Norfolk and jokes about Bognor Regis just aren't funny anymore.

Overseas travel is still seen as desirable, but this is balanced with a greater range of options for leisure and recreation nearer to home. With a limited carbon and financial budget, the once tight connection between 'leisure time' and 'overseas travel' is less automatic in many people's minds.

Although holidays abroad can deliver adventure, new experiences and the unexpected, some travel companies are able to offer this domestically. Home and Away offers a four-week holiday – two weeks overseas, but the first two at home where a guide helps you 'explore the excitement of your local area, revealing experiences nearby that you never knew existed'.

The numbers visiting the UK from abroad have also increased sharply. The European high-speed rail network allows Southern

Europeans to escape the stifling summer heat, and many now visit the UK. This surge in demand from domestic and international visitors means that infrastructure is at capacity – the problems that crippled some summer resorts at the start of the century have spread right across the country. To make better use of domestic capacity, the British government has begun staggering school and bank holidays in different parts of the UK, giving local families the same time off but avoiding cramming in the country's most popular places.



the UK outbound travel and tourism industry

The holy grail of transformative low-carbon technologies has so far proved elusive. Initiatives flopped; research trials were abandoned due to lack of funds and a focus on the short-term; and new types of fuel were exposed as ineffective and unsustainable. Aircraft and ships today are simply not as carbon-efficient as many hoped they would be – meaning ticket prices are very expensive in this carbon-constrained market.

Because people travel abroad less, there has been significant over-capacity in the UK's outbound travel sector. Stansted Airport was converted into a retail park in 2019, which closed three years later. There has been investment in some train and shipping infrastructure and a niche boom in low-carbon slow travel, such as the state-of-the-art airships that glide silently across the skies.

Carbon criteria

The cost to consumers of using forms of transport that emit large amounts of greenhouse gases is high, and the Treasury budget shows that this will steadily increase over time. The larger industry players have responded to this in different ways. Some have bought train stock in bulk; others are looking to sea travel as the cheapest way to get passengers overseas.

In addition, carbon credits can be tied to the social or economic value of any trip. If holidaymakers can produce proof of a real contribution abroad, UK Customs offers a valuable carbon rebate.

New types of holidaying

The UK's outbound travel and tourism industry has contracted over recent years, but innovative businesses have restructured to continue to deliver the real value that consumers seek.

The quest for experience-based travel has brought benefits to those who want to sell holidays. Customers are sometimes willing to sign up for activities no matter where they are in the world, provided that it's within their carbon budget. This means that canny operators can use destinations flexibly and change plans at the last minute if issues arise.

Entrepreneurial businesses thrive if they can offer something novel. The popularity of low-impact holidaying and the small and unique means that customers often look to small businesses to fulfil their needs in local communities and abroad. Charities and other not-for-profit organisations are also offering holidays. For example, the new Sail from Somalia NGO offers a two-week adventure course on the sea that capitalises on local knowledge of post-conflict resolution to help with reconciliation between arguing British couples.

Because people save up for one big holiday every few years, the experience has to be exceptional. All customers have the highest expectations of business; they undertake diligent research through volumes of feedback and rely on word-of-mouth recommendations. Businesses that fall short of these standards frequently go out

of business. Proving the positive impact of any holiday is crucial, and savvy consumers are using today's technology to track and check-up on where their cash is really going. For example, Track your Euro is a slightly gimmicky but still entertaining application that allows users to implant a small chip on their note and trace where it ends up.

Large-scale tourism has fallen from favour, but some package holidays are used as a carbon-effective means of visiting places – but it's normally highly personalised, small scale and is designed to meet the highest expectations. Large hotel chains are shrinking as the 'big brand' trend of the twentieth century has gone out of favour. Instead, smaller scale accommodation that is sustainable and cost-effective is the priority for most UK holidaymakers abroad.

Customers are much more willing to be independent and directly book their own forms of transport and accommodation after careful thought and selection.

Global growth, global companies

Although UK outbound tourism has declined, the industry has experienced growth globally, particularly from the new economies of the East. Many operators have either refocused on domestic tourism or have become truly global operators, for example organising holidays for Chinese tourists to South America. Differential carbon taxes across the world mean that some airlines fly regionally, for example within Latin America or South Asia.

the holiday journey 2023

Solo traveller

Molly is 27, and she's studying Corporate Wellbeing at university. For her holiday, she's after a really memorable experience with some adventure, fun and meeting new people. As she's got some time to spare, she opts for one of the affordable 'below the radar' holidays: overland travel only by 'couch-surfing', where she can sleep for free on the sofas of people who are members of a 'couch-surfing' online group. She's bought one ticket that includes all electric bus and train transfers in different zones across Europe. Molly's picked a Zones 1-3 ticket allowing her to couch surf as far as Belarus over 6 weeks.

Family holiday

The Singh family normally holiday in the UK but this year they are planning a trip abroad. They experienced a number of options virtually in advance before plumping for Senegal. They will fly, blowing their hard-saved carbon allowance but getting a poverty-carbon rebate because of the value of their trip. They'll be helping out at the climate refugee centre for 2 weeks and then relaxing in the mountains afterwards at an ethical learning retreat. The kids will continue to study 'virtually' with their classmates back home but also participate in local enrichment activities. The Singhs are careful to stay in touch with the project online once they are back home and build the relationships for next time they return.

Retired couple

Steve and Matt occupy the tail end of the baby boom generation. The collapse of Matt's pension fund in 2015 has really stretched their household budget. They simply didn't count on having so few savings. Costly medical care is also a burden as certain types of operation are no longer free at the point of use if they are deemed 'non-essential'. The couple have been saving what they can for a trip to Finland. Like most people nowadays, Steve and Matt consider themselves to be actively engaged citizens. They've carefully screened each of the companies involved in the trip for ethical policies and any negative media comment on them, using one of the easy online filters. They pay all the costs upfront, but because it's a pick 'n' mix package, they can change their itinerary quickly to suit whatever experience they feel like. The couple finally set sail for Helsinki with an unexpected bonus of passing the new offshore Wave Power Centre on the way.



destinations

Visitors from the UK have clear expectations of destinations: sustainably managed local resources and strong, happy local communities that directly benefit from their visit. Locally sourced food, renewable energy management and closed loop systems are all popular with tourists who expect the highest standards from wherever they choose to visit with their hard-earned carbon and financial savings.

Other destinations overseas have struggled to maintain tourism volumes. This is a highly competitive international market with many resorts fighting for a share of an ever-smaller pie. Many try to exploit their niches, investing heavily in marketing to the UK consumer to emphasise their accessibility by numerous routes, affordability – even on a tight carbon budget, and range of exhilarating experiences that you can undertake, immersing yourself for two weeks or two years.

The most successful destinations offer attractive wilderness, open spaces and national parks for escape; truly worthwhile placements that demonstrate a measurable impact; or genuinely authentic local experiences that teach visitors something new.

Government regulation has improved many areas

Government regulation in destinations has increased: developments are more tightly controlled; visitor numbers better planned and monitored; and the real benefits to the local community are all measured and assessed.

The authorities see tourism as a means to an end: a closely controlled development process to empower local communities and improve quality of life. International development agencies classify tourism as a legitimate human development mechanism, and the UK's Department for International Development co-sponsors projects that conform to their tight sustainability criteria: maximum impact of local lives; minimum impact on the planet.

Some countries that were once dependent on high volumes of tourism have been forced to diversify. Others have become locked into high carbon paths of development, and their tourism is suffering as a result. It's not just that over-ambitious expansion of airports has left terminals empty, but UK operators effectively blacklist regions without a clear and well thought out development plan. This has provoked a ferocious debate amongst members of the public in the media as to where the moral responsibility lies for visiting others to help them improve their lives.



fastest growing holiday destinations for UK visitors



- 1 Cornwall
- 2 Ukraine
- 3 Sweden
- 4 Mozambique Special Volunteer Zone
- 5 Lithuania
- 6 Northumbria
- 7 Cork
- 8 France
- 9 Slow Boat Community (registered to Guyana)
- 10 Liverpool

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

Aukštaitija National Park
near Ignalina.

GOVERNMENT
APPROVED



MUM'S HOUSE

13 The Street

Little Village

UK

T2023 SVS

8. how to use the scenarios

Scenarios can be fun to read and to try to imagine what the future might hold. But their real value lies in their practical application. They have already been used to inform the industry vision and develop and test the strategic approach.

Thinking ahead and planning for the long-term are essential parts of any organisation's strategic planning. We've outlined three suggestions opposite for how the scenarios could be used for policy testing, strategy development and innovation. For each suggestion, the ideal application could be a full or half-day workshop. You could invite a wide range of representatives from different divisions within your organisation as well as external stakeholders to run through the process.

Key question		Suggested application (as an individual or group workshop)
Strategy Development We're revising our organisation's five-year strategy. We looked back on the last one and were surprised by how differently things turned out. How do we make sure that we take a long-term perspective and that our strategy is as robust and achievable as possible?	→	Take each scenario in turn and explore: what might be the (a) opportunities and (b) risks to my organisation if this world were to come about by 2023? What needs to be modified in the strategy Collect and compare ideas from the four different scenarios. Are there opportunities that are common to all? Are there big risks that the strategy may not have considered? What changes can be made that work in all scenarios? Revise the strategy in the light of these findings, then 'test' it in each scenario (see 'Wind tunnelling' below). Consider how your policy, investment, decision or strategy might work if each of these scenarios were to come about.
Policy Testing I have a policy idea for my organisation, a major capital investment to make or a big strategic decision to take. How can I make sure I make the right decisions? I have an existing strategy that I want to work from. How can I check that it's fit for purpose?	→	List the policy components or current strategic initiatives and compare each against the four scenarios. Ask yourself, if you lived in this world in 2023, what might be the strengths and weaknesses of this policy? Compare the analysis across the different scenarios and use this information to revise the policy. Repeat the process again until you are satisfied that this policy can be as robust and achievable as possible, whatever the future holds. Take each scenario in turn and use it as a basis for brainstorming. What new holiday products, service offerings or business models might evolve from and be successful in each one?
Innovation I want to be more innovative to stay ahead of the competition. How can I come up with new ideas?	→	Use the scenario components as a basis for imagining further ideas. Ask yourself: if I lived in this world, how might my needs be different from today? How could an organisation help me meet those needs? Look for overlaps between the scenarios. Are there innovations that could thrive in all of the scenarios?

If you are interested in further help using the *Tourism 2023* scenarios or adapting them for your region or organisation contact Forum for the Future: tourism@forumforthefuture.org

Further ideas for futures workshop exercises as available online, for example at the UK Government's Foresight Horizon Scanning Toolkit <http://hsctoolkit.tribalcad.co.uk>

9. our vision

Tourism 2023 is not just about understanding what the future might hold, it is also about shaping it.

The scenarios explore very different directions in which the industry may develop, and show that companies can create a better commercial future for themselves by thinking through the wider impacts of their services and taking a sustainable approach. To get to the future you want, it's important to know what it looks like and what you're aiming for – to have a vision.

By describing what a sustainable UK outbound travel and tourism industry could look like, the industry can develop appropriate strategies to ensure a profitable, successful future.

Signatories to the *Tourism 2023 Vision* are committing to integrate the vision into their business strategies and to working together to deliver innovative solutions to the challenges ahead.

To build this vision, Forum for the Future facilitated an initial workshop with travel and tourism stakeholders including academics, industry representatives, campaigners, legislators and commentators. Participants used the *Tourism 2023* scenarios to help identify the key risks and opportunities facing the industry. They then used a sustainability framework called the Five Capitals³⁹ to build up a set of vision statements for a sustainable industry in 2023. The *Tourism 2023* Advisory Board and Steering Committee have guided the vision's development.

a vision for a sustainable outbound travel and tourism industry in 2023

We, the undersigned, believe in the benefits of travel and tourism. Our industry opens up the world, connects lives and delivers holiday experiences that bring happiness to millions.

But the future is likely to be dramatically different from today. We have explored a range of scenarios, which show that there are some major risks to the holiday experience and the way we currently operate. These radical changes in our external operating environment give us an urgent commercial imperative to reshape our businesses.

As an industry, we want to lead the way towards a better future – for our own success and for wider society; with sustainable tourism as part of a sustainable society. We have set out what we think that looks like in our vision. It recognises our responsibilities to **our environment** – the finite natural resources upon which we all rely; **our staff** and **our customers**; and to **our communities** – the lives of all those touched by our industry.

That's why we are committed to ensuring a net positive impact – creating more 'good' than harm – for our industry by 2023.

We have set ourselves six principles to create a sustainable future:

1. **our environment** is protected, not eroded by our operations; we will take every opportunity to enhance it.
2. **our employees** are given opportunities to develop to their full potential.
3. **our customers** are provided with mainstream sustainable products as the norm.
4. **communities that we work in and with** benefit from all of our operations.
5. we strive to be sustainable in **our infrastructure** through innovation.
6. **our business value** incorporates social and environmental costs so that we can ensure sustainable profits (financially, but socially and environmentally too).

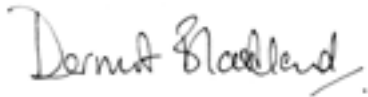
Our Vision sets out the broad ambitions that we want to achieve within fifteen years. But we can't wait for 2023 to be sustainable: we need to act today.

We want others to join us on this journey to put sustainability at the heart of our industry. Through our partnership, these commitments and strong leadership, we can create our future: a thriving outbound travel and tourism industry that is both profitable and sustainable.

the UK outbound industry's vision for the future

The signatory companies of this Vision commit to the following ambitions by 2023. We commit to this Vision for all operations under our direct control. We also recognise that we have the power to influence others in the way that we do business, and a responsibility to do all that we can to support the rest of the tourism value chain to achieve this Vision. We will therefore do all we can to influence standards and policies internationally to benefit people and the environment, by working with others in our industry and governments around the world.

Dermot Blastland
TUI Travel PLC



Andy Cooper
Thomas Cook



Jonathon Counsell
British Airways



David Dingle
Carnival UK Group



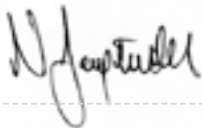
Mike Greenacre
The Co-operative Travel



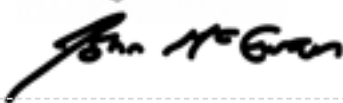
Sue Hurdle
The Travel Foundation



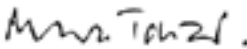
Noel Josephides
Sunvil Holidays



John McEwan
Advantage Travel Centres



Mark Tanzer
ABTA



1. our environment

In all our activities, we recognise the impact we have on the environment, both directly and indirectly. As an industry in 2023, we make a net positive return on 'natural capital' across the value chain. It makes commercial sense for us to commit to ambitious efficiency savings, to prepare for environmental shocks and to add to the natural environment that we all depend on, not detract from it.

This means that by 2023:

- 1.1** We are as energy-efficient as possible in the way we transport tourists and provide for them in destinations.
- 1.2** We use more and more sustainable renewable sources of energy, as the technology becomes available, in order to dramatically reduce greenhouse gas emissions from tourism.
- 1.3** We are using water sustainably, taking full account of local demand and using full catchment management where possible.
- 1.4** We strive for zero waste. We maximise the opportunities to recycle our waste and minimise the waste we send to landfill in our operations, resorts and on planes, trains and ships.
- 1.5** We afford special protection to scarce and vulnerable ecosystems, aligned to global approaches. Where we have particular impacts we strive to have a net positive impact on biodiversity.

1.6 All new and refurbished developments in our control preserve quality, aesthetic beauty, tranquility and local environment.

1.7 We match new investment to availability of resource; and capitalise on opportunities for community provision in new developments.

In our environmental commitments we aim to avoid or manage trade-offs that have a negative impact in order to achieve an overall net-positive return on natural capital. We recognise the need to measure environmental improvements in both absolute and per unit terms. For example, total tonnes of carbon emitted, as well as tonnes per passenger or per holiday.

2. our employees

Our employees have the understanding, knowledge and power to make tourism more sustainable. Investing in them helps us achieve our goals as a business, and enhances staff and customer loyalty. Through strong leadership we are good employers, with motivated, knowledgeable staff with high job satisfaction, who feel valued and enjoy their work.

This means that by 2023:

- 2.1** All those working in the industry understand their role in making tourism more sustainable. We actively equip our employees with the knowledge and power to help us with this aim.
- 2.2** We promote diversity in our staff who work together, both here and overseas, to make our industry stronger
- 2.3** We ensure individual development; fair rewards; safety and fair and flexible working conditions.
- 2.4** We play our part in destinations by ensuring local staff are treated fairly and are safe; evaluating our practices; pursuing ethical standards; and building local skills.

3. our customers

Our customers have the information that they need to make the most sustainable holiday choices. They understand the need for sustainable tourism and they demand sustainable holidays. We provide holidays that are safe, accessible, enjoyable and more sustainable.

This means that by 2023:

- 3.1** We offer our customers more sustainable products, or where we cannot, we make it clear why.
- 3.2** We have developed a consistent message across the industry that sustainability must be accounted for in every aspect of tourism. We communicate to customers how they can play their part.

4. communities

Tourism is welcomed in destinations as a key generator of economic benefit. We need to maintain our future license to operate by demonstrating measurable socio-economic benefits to the destinations and their communities. That way, our operations are welcomed by host communities and our business is sustained for the long term.

This means that by 2023:

- 4.1** We demonstrate measurable social-economic benefits of travel and tourism to destinations.
- 4.2** Working with local government and suppliers, we agree minimum sustainability criteria in all destination planning – from before our operations begin, through to a responsible exit strategy if we leave.
- 4.3** At each destination a ‘fair’ proportion of tourism benefits (supply chain and social benefits) are ‘local’ – determined in dialogue and partnership with local stakeholders (including government and communities).
- 4.4** We understand the likely climate change impacts on our operations and surrounding communities and take full account of them in destination-planning.
- 4.5** We work in partnership with destination governments to enhance sustainable tourism development.

5. our infrastructure

We ensure that all our infrastructure is as sustainable as practicable. We can save on costs in a competitive environment through efficiencies; and make sure our investments are fit for the future.

This means that by 2023:

- 5.1** We ensure that all new developments and refurbishments adopt and implement sustainable development principles in order to future-proof for major impacts like climate change.
- 5.2** We deliver transport that is energy efficient and uses the best practicable technological and operational solutions to reduce environmental impacts and costs.
- 5.3** We have agreed sustainability measures, which the UK industry applies globally, to measure the net environmental, social, and economic impact of our holidays.
- 5.4** We have prioritised the phasing out of less sustainable infrastructure.
- 5.5** We innovate and invest today to find more sustainable solutions for the future.

6. our business value

By 2023 every element of the travel industry will have the opportunity to make a profit and grow in a sustainable way – socially, environmentally and financially; the market rewards sustainable tourism.

This means that by 2023:

- 6.1** We will have business models that enable sustainable returns.
- 6.2** We measure and account for our social and environmental impacts to build up a full picture of the costs and benefits of our business.
- 6.3** We use our influence to support and lobby governments to create the right market and regulatory mechanisms to incentivise sustainable travel and tourism.
- 6.4** We report back on the sustainability performance of all aspects of our holidays to drive improvement. This transparency also enables our customers to choose more sustainable options.

10. our proposed strategic approach

The *Tourism 2023* scenarios show us that the future is likely to be radically different from today, and our industry will have to change to survive and prosper. They also show us that the industry needs to take urgent action now to secure a sustainable future. Waiting until 2022 to tackle the challenges ahead will be far too late.

The strategic approach is two-pronged: Firstly, *Tourism 2023* signatories will work out how their individual organisations can contribute to achieving the *Tourism 2023 Vision*. This will require changes in policy and practice.

Secondly, the industry will need to work together. The *Tourism 2023* research and consultation identified three areas that require urgent action but that cannot be tackled by one organisation in isolation.

To identify these areas, Forum for the Future facilitated a process to gather information on all of the current sustainable tourism initiatives. Next, during the final industry workshop, participants prioritised the vision commitments according to three criteria: 1. if urgent action was required now to tackle them, 2. whether or not they were being sufficiently tackled by current initiatives and 3. whether they required collaborative action to be best achieved. The following three areas were prioritised for urgent, collaborative action:

- 1. Sustainable destinations:**
demonstrating and monitoring the economic benefit tourism delivers to destination communities.
- 2. Low carbon innovation:**
seeking, finding and implementing solutions to make tourism a low-carbon, low-impact industry.
- 3. Driving customer demand:**
increasing the market share for sustainable tourism

During the workshop participants developed ideas on how to tackle the three areas. These ideas were further developed with guidance from the project's Steering Committee and Advisory Board.

Further detail on each proposed work programme – what they would aim to achieve and the benefits of getting involved – is provided below. All work programmes would be designed to support, complement and build on existing initiatives.

Sustainable destinations: demonstrating and monitoring the economic benefit tourism delivers to destination communities.

Aim



To ensure that the destinations that we visit are as sustainable as possible.

The elements of the T2023 vision this will help achieve



- 4.1** We demonstrate measurable social-economic benefits of travel and tourism to destinations.
- 4.2** Working with local government and suppliers, we agree minimum sustainability criteria in all destination planning – from before our operations begin, through to a responsible exit strategy if we leave.
- 4.3** At each destination a 'fair' proportion of tourism benefits (supply chain and social benefits) are 'local' – determined in dialogue and partnership with local stakeholders (including government and communities).
- 4.5** We work in partnership with destination governments to enhance sustainable tourism development.

Brief description



- This workstream is all about protecting the tourism product. This will involve working with destination governments to plan for destinations to grow sustainably.
- This workstream would research and develop a standard approach to measuring and maximising economic benefit in destinations. This could include applying standards like Travelife in destination hotels to encourage and promote sustainable practice. We could also use the *Tourism 2023* scenarios with destinations, resorts and hotels to ensure that they are fit for the future.

Benefits of being involved



- Proving and collectively monitoring the economic benefit of tourism to destinations.
- Playing an active role in protecting holiday destinations into the future, increasing their value and appeal to customers.
- Leading the way and being part of the solution.

Innovation for low carbon: seeking, finding and implementing solutions to make tourism a low-carbon, low-impact industry; trailing new technologies and taking them to scale.

Aim	For the UK outbound industry to lead on delivering low-carbon, low-impact holidays, including a 50 per cent reduction of CO ₂ emissions across the industry by 2035 ⁴⁰
The elements of the T2023 vision this will help achieve	<ol style="list-style-type: none"> 1.1 We are as energy-efficient as possible in the way we transport tourists and provide for them in destinations. 1.2 We use more and more sustainable renewable sources of energy, as the technology becomes available, in order to dramatically reduce greenhouse gas emissions from tourism. 1.3 We use water sustainably, taking full account of local demand and using full catchment management where possible. 1.4 We strive for zero waste. We maximize the opportunities to recycle our waste and minimize the waste we send to landfill in our operations, resorts and on planes, trains and ships. 1.7 We match new investment to availability of resource.
Brief description	<ul style="list-style-type: none"> • This workstream is all about accelerating the transition to a low-carbon, low-impact industry. It's about sharing learning, trying new things, and scaling up the solutions that work. • We'll need to do things differently in future to survive as an industry. By working together the industry can save money and find solutions quicker. We can't sit and wait for technology to come along to fix our problems – we have to ask for it, get involved in trying it out and share what we learn. There are lots of ways we can do this; through competitions, promoting research or running pilots to trial new initiatives. • This workstream would also look at the business models needed to make low-impact tourism mainstream and other enabling factors needed to make low-carbon technologies happen.
Benefits of being involved	<ul style="list-style-type: none"> • Saving money and time by learning from others. • Encouraging and tapping into new ideas early, being ahead of the game. • Proactively finding solutions to meet carbon reduction targets and addressing resource shortages.

Driving customer demand: increasing the market share for sustainable tourism by promoting its benefits to customers and by developing further customer insight into what motivates people to take sustainable holidays.

Aim	Customer demand for sustainable holidays drives further improvements in practice across the industry.
The elements of the T2023 vision this will help achieve	3.2 We have developed a consistent message across the industry that sustainability must be accounted for in every aspect of tourism. We communicate to customers how they can play their part.
Brief description	<ul style="list-style-type: none"> • There was lots of debate throughout the project about whether the customer was ever going to provide sufficient pull for the industry to become sustainable, or whether companies should simply get on with it and edit choice to ensure a sustainable approach. This workstream would offer a combination of both. • Ideally, it will look at developing consistent messaging to consumers and applying global standards that can be part of that messaging.⁴¹ It would build on existing work⁴² to understand how the industry can help its customers behave more sustainably on holiday and to make more sustainable holiday choices. • Importantly it would also look at rewards as a fast-track way to engage the customer in green issues while buying holidays. This workstream could also explore destinations that need to be given special protection and high-impact holidays that should be phased out. • This workstream could play a role in communicating the outcomes of other workstreams.
Benefits of being involved	<ul style="list-style-type: none"> • Developing further consumer insights such as understanding what will motivate people to go on sustainable holidays. • Building a larger market share for sustainable tourism.

⁴⁰ This is the WTTC target on CO₂ emissions reductions that some of the T2023 partners are already signed up to. However, the UK government target is 80 per cent by 2050, with an interim target of by 34–42 per cent by 2020 (dependent on a global deal)

⁴¹ We don't envisage that this work will develop a global standard itself, but will support other activities in this area such the Global Sustainable Tourism Criteria <http://www.sustainabletourismcriteria.org/>

⁴² See for example Miller, G., Rathouse, K., Scarles, C., Holmes, K. and Tribe, J. (2007). Public understanding of sustainable leisure and tourism: A report to the Department for Environment, Food and Rural Affairs. University of Surrey. Defra, London.

11. Tourism 2023: how to get involved

Now it's time for action. The *Tourism 2023 Vision* signatories' aim is for the industry to build on *Tourism 2023*'s energy and momentum through a next phase of combined effort, improved performance, monitoring and reporting.

The *Tourism 2023* signatories recognise the need to do more and are excited about what they could achieve together. But they are also conscious that the UK outbound industry is much broader, and to create a real head of steam, others need to join them in this industry-defining endeavour. So join us!

Signatories to the *Tourism 2023 Vision* are committing to integrate the vision into their business strategies and to working together to deliver innovative solutions to the challenges ahead.

Following the publication of this report the next phase will be to engage with the wider industry. The founding partners and Forum for the Future, ABTA and The Travel Foundation, with the support of Government, are now working together to develop the framework to engage the wider industry and to deliver the *Tourism 2023 Vision*.

Join us on this journey to put sustainability at the heart of our industry. With strong leadership and commitment we can help shape the future we want – a thriving outbound travel and tourism industry that is both profitable and sustainable.

There are several ways for you to get involved with the Tourism 2023 ongoing programme of work.



sign up to the Tourism 2023 Vision

Join leading businesses that have made a commitment to secure a long-term future for the industry.

To sign up your organisation contact:
tourism@forumforthefuture.org

help shape the next phase of Tourism 2023

Be part of the solution and link up with industry peers as they join forces to tackle the biggest future challenges.

For further information contact:
tourism@forumforthefuture.org

12. acknowledgements

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