

SECTION I

Chapter 1

Introduction: World Tourism and the Tourist in 2030

I wanted to write this book in order to set out where I think world tourism will be in 2030. As the world's only dedicated scenario-planner and futurologist in the tourism field I am in privileged position. I could have been controversial and predicted the end of the world because of high oil prices, war in the Middle East, demographic time bombs, pandemics and terrorism. I do not, however, believe that the world is coming to an end in the next 25 years — but I do believe that tourism is changing and that markets are shifting.

This book is about where world tourism will be in 2030 and what the tourist will be doing in 2030. I believe that tourism is about experiences, not about virtual worlds — so Captain Kirk's virtual tourism experience is not included (however, a weekend break in outer space will be possible). This book is not about technology, because technologies are not places but are simply information channels and enablers. I do, however, discuss how technologies and the new media are drivers of the tourist's choice of destination. This book is not about the future of terrorism, war, diseases and disasters, as these have always been part of our lives and will continue to influence what we do. This book is about *you*, where *you* will go on holiday and what *you* will do when you get there. All the chapters set out to explain why changes are occurring and this is done through a comprehensive analysis of trends — along with a little bit of blue skies thinking.

The writing of this book has been supported by the Future Foundation, a leading London-based consumer think-tank, with which VisitScotland has worked since 2004. The book has drawn heavily on the Future Foundation's *Changing Lives* Survey, which is a comprehensive omnibus survey of European households. The book, therefore, is a collaborative effort between myself, my colleagues at VisitScotland, my academic partners and the team of analysts at the Future Foundation.

I believe the world economy is strong and will continue to grow, even given the present debate about global warming and climate change. The book is *supported* by a website www.tomorrowstourist.com, where you will find a range of materials about everything that is not mentioned in this book and more.

Prof. Ian Yeoman
Futurologist
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The Future

History tells us that war affects tourism. Durie (2003) established that the first tourists came to Scotland because of war in Europe. The first Grand Tours of Scotland, for example, were enjoyed by European tourists who were avoiding France and Germany during the Napoleonic Wars, and tourists chose Scotland rather than Ireland in early Victorian times because Ireland was regarded as barbaric and unsafe for travellers.

The 9/11 attack on targets in New York and Washington in 2001 sent the world into a panic, and the resulting legislation has impacted on US tourism, making it harder for tourists to visit the country because of higher barriers to entry, such as visas, biometric passports and extra security checks at airports. There is also a perception within potential markets that if people say something negative about the United States then they could face detention (Yeoman, 2007).

As Durie (2003) points out, wars have always happened and will continue to happen. The same can be said about the present debate about global warming. People often forget that the climate has been undergoing change since the beginning of time — in the twenty-first century, we tend to believe that climate change is a new phenomenon and the world may be coming to an end.

Taking the Long View

If people's time horizon encompasses only 1 day in the past and 1 day in the future — then their perception of the future will be the same as their understanding of the present. If we cannot see beyond tomorrow, then we shall not have the ability to anticipate change, nor take relevant action in response. If our time horizon is only yesterday and we do not consider circumstances of long ago, then we cannot understand the cycle of events when they re-occur. The long view is about 'picturing' what the world could look like as a consequence of change. Taking the long view is important because the consequences of unfolding trends can be 'pictured' only over a time period of 10, 20, or 30 years, whether it be the impact of demographics or technologies.

Taking the long view is the secret ingredient of success, because without doing that the business world cannot prepare for the future. Today, the pace of change in the modern world is frightening as the line between fact and science fiction becomes blurred. If you want to understand the future of technology, you have to take a science-fiction approach in order to imagine the imaginable — such is the pace of change. The nature of work, consumer expectations and the environment are all shifting radically, making it difficult for society and businesses to plan ahead and to prepare adequately for future challenges. Indeed, in our age of hyper-change, many people have no notion of what sort of world they should prepare for. Taking the well-considered long view or having sufficient foresight, in contrast to accepting fatalistically what will happen, gives us increased power to shape our future, even in the most turbulent times. People who can think ahead will be prepared for the rapid social and technological progress that is affecting every aspect of our lives.

Many of the best-known techniques for long-term planning were developed by US military planners, because the post-World War II nuclear age made it critical to ‘think about the unthinkable’ and prepare for whatever might happen. Pioneering futurists at the RAND Corporation (the first think-tank) began to seriously consider what new technologies might emerge in the future and how these might affect the security of the United States. The RAND futurists, along with others, refined a number of ways of thinking about the future. Futurists recognise that the future is continuous with the present, so we can learn a great deal about what may happen in the future by looking systematically at what is happening now and what has taken place in the past. The key is not simply looking at events but rather scrutinising trends, such as long-term shifts in population or the increase in the processing power of technology. Futurists develop these trends into scenarios, as a way of thinking about the future. Scenarios are not predictions but are a way of setting the scene (or scenes) so as to state in a credible way what could happen in the future. Scenarios help us think about what the future may bring and help us react or adapt to circumstances in a relevant way.

A useful technique is trend analysis, which is an examination of the causes, the speed of developments and the impact they may have. This is one of the techniques that has been used throughout this book; for example, a longer lifespan is one of the key drivers of change in a number of chapters:

- As society ages, medical discoveries extend people’s lifespan and consumers also become more interested in well-being therapies.
- As society ages, people become interested in sporting activities in order to stay healthy and live longer.
- As the population ages, people’s attitudes and outlooks change, and they desire earlier retirement or second/holiday homes or more time with grandchildren.

This book is based on a combination of different disciplines and methodologies. The thinking about scenarios has required an appreciation of history in order to understand the future; it means recognising the macro drivers that are shaping the world and what impact they may have on tourism. The thinking has also necessitated a comprehensive understanding of economics and demographics in order to envisage future purchasing power and the impact on tourist flows and destination choice. We have used the application of psychology and sociology in order to understand what the future tourist will do on holiday. Scenarios also consider barriers to growth, such as people’s need for security and the impact of climate change. The strength of argument in this book lies in the methodology and analysis behind it, which seek to explain through trends where the tourist will go on holiday in 2030 and what they will be doing with the use of a little bit of creativity and imagination. As well as providing scenarios for the future, this book gives an insight into *how* change is occurring, by using data from the Future Foundations *Changing Lives* Survey.

Changing Lives is a comprehensive survey of European households, which since 1980 allows futurists or researchers to understand how change has taken place over a

period of time. In addition, the data which comes from such a survey allows futurists to put forward projections of trends in order to find out what the impact of those trends would be.

Some of the chapters vary in size depending on the complexity of the subject. They can be read in whichever order you prefer, but I would recommend that the first section is read first — it just reads better that way.

What Will World Tourism Look Like in 2030?

According to some history books, with the invention of money by the Babylonians and the development of trade round about 4000 BC, travel and tourism was invented! Chapter 2 discusses the development of world tourism and the tourist, and whether the tourist is travelling for business or for pleasure. Chapter 3 begins with a forecast that the world GDP will rise by 129% by 2030, but the world in 2030 will be different from that in 2005, whether in terms of changing demographics or the impact of energy supply. The chapter looks at 17 mega drivers that will shape the world in the years leading up to 2030 and their consequences for world tourism. Chapter 4 examines the macro conditions that will shape destinations and the consumer trends that will influence the tourist's choice of destination and activity.

Chapter 5 is one of the most important chapters in the book, because it gives forecasts of who the winners and the losers will be in 2030. By 2030, there will be 1.9 billion international arrivals and world tourism receipts will grow to US \$2 trillion. China will be the world's largest receiver of international tourists and the United States will be the largest economy in terms of international receipts. The winners in 2030 will be Turkey, the United States, Macao, Australia, Malaysia and China, whereas Europe will be the biggest loser, losing 13% of market-share between 2005 and 2030.

What Will the Tourist Do on Holiday in 2030?

The opening chapter in this section explores how an affluent and ageing society searches for the foundation of youth and the perfect body in *Incredible India*, whether it be medical enhancement of their body or a holistic well-being approach. The chapter provides an in-depth analysis of the trends which are shaping an ageing society and, from a tourism perspective, how India has positioned itself as medical tourism destination for plastic surgery. An elderly population will be more frequent users of health-related goods and services in the future, making tourism and health the world's largest industries by 2022. Look out for waiters as your nutritional advisor and fashionable pampering holidays for tourists with pets.

Chapter 7 looks at how the family structures will change in the United States, moving from a traditional, horizontal to a vertical model with more aunties and uncles. In 2030, the world will have fewer children and grandparents living longer; children will become more important in 2030 because adults will want to spend more time with — and money on — them. The niche market of grand-travellers

will emerge, where grandparents and grandchildren will take holidays together, especially during school holidays when many parents have to work. In Chapter 8, we show how the mountainous country of Albania on the Adriatic Sea known as *Shqipëria*, or the land of eagles, once a shadowy Communist prison state, will emerge as a leading Southern European destination by 2030 because of its low cost of living, sunny climate, sandy beaches, stunning landscape and proximity to the European markets. One of the key factors to drive this growth will be the second-home tourist. We also explore how the increasing number of second homes could be the economic facilitator for the development of golf courses and resorts along the Adriatic coast.

In Chapter 9, we look at how, at a time when many futurists are talking about the ‘greening’ of tourism and about sustainable development, Las Vegas, the Disneyland for adults, provides an example of the opposite end of the spectrum. Las Vegas is the place where anything can happen, where anything goes and wives will never find out! Its naughty, raunchy marketing slogan, ‘What happens in Vegas, stays in Vegas’, represents the sinful side of tourism. Vegas is about conspicuous consumption and lavishness. Why will it be so successful in 2030? Simply because of sex and sin. Vegas is a sinful city where tourists take vacations for adult, undiluted erotica; this is where their fantasies are played out. At the same time, however, Las Vegas has a dark side of exploitation and modern-day slavery.

Chapter 10 explores shopping as a leisure activity and Dubai as the world’s most ostentatious, luxurious retail destination in 2030. Dubai is about conspicuous consumption where themed environments act as attractors, catering for adults — it is the bourgeois Disneyfication of destinations. Shopping in Dubai is the symbol of luxury, of play and of pleasure, all associated with lifestyle and consumerism. This chapter provides an analysis of shopping trends and an examination of Dubai and the Middle East as retail-shopping destinations. Chapter 11 explores the world of Bridget Jones because by 2030 single females who live alone could represent 19% of UK households. For them holidays in 2030 will be meeting places for singletons and the opportunity for romance and sex!

In Chapter 12, we explore several themes that will shape the future of tourism in Africa. Our scenario follows Siubhan, a wildlife enthusiast, who is taking a career break, doing volunteer work and searching for new and meaningful experiences. She stays longer and goes ‘deeper’ than most tourists — seeking a truly authentic experience. The Middle East is the centre for the Islamic religion and in Chapter 13, pilgrimage and tourism are discussed — we look especially at the consequences of the rise of Islam and the decline of Christianity, along with the rise of spirituality.

Observers of Scotland’s food have contrasting opinions. For some observers, the Scots have the worst of diets and the highest obesity rates in Europe; others consider Scotland as the producer of the finest smoked salmon, game and shellfish in the world. Food is an important feature of Scotland’s tourism landscape and living culture. Chapter 14 explores how the concept of the food tourism will develop and what the food tourist to Scotland will look for in 2015.

Extreme sports, particularly those such as skateboarding, surfing, bugging, base-jumping and extreme ironing, evoke a lifestyle choice resulting from a certain

mindset associated with the adrenalin rush which people seek in order to break through the boundaries of normality and everyday life. Chapter 15 explores why the tourist of the future will be interested in sport and how destinations are being shaped by sporting events, in this case London as the venue for the Urban Rat Race. In 2030, the Gleneagles Lunar Space Station will be the world's most exclusive resort. On entering the Virgin Galactic spaceship at Auchterarder, space tourists will fasten their seat belt, hear the rockets roar and feel the sudden power of 4G acceleration. As the spaceship reaches the stratosphere they will gaze down on Planet Earth for the most exclusive view in the world. During their stay at the Gleneagles Space Station tourists will enjoy a round of golf, take the lunar buggy out for a spin and float around the leisure complex. Chapter 16 discusses space tourism as a metaphor for the changing concept of luxury and the tourist's desire for new experiences, whether it be space travel or something rather more down to earth.

Chapter 17 looks at the future of Macao and the emerging middle classes of China's burgeoning population. By 2030, Macao will outstrip Las Vegas as the world's most important gambling and entertainment resort. Much of this growth will be driven by the Chinese people's love of gambling and the lack of opportunity to indulge their passion on mainland China. Chapter 18 focuses on the cultural capital through participating in festivals, with the Rio Carnival used as the leading example of a spectacular extravaganza of costumes, parades and parties. There is nothing conformist about participating in the Carnival — it is a parade of self-expression and creativity that encourages non-conformity. The reference point for the tourist who takes part is individuality and innovation, and of being different, because being at the Carnival is a self-expression of escapism from the norm and of becoming the kind of person one cannot be at home.

What will the tourist to Scotland look like in 2025? In Chapter 19, three scenarios are developed, looking at how different generations perceive Scotland and what they would do on holiday. These three global clans in 2025 are designated as: 'Freedom Fighters' — those aged 65+; 'Millennial Sophisticates' — those aged 40–45 years and 'Shanghai Virtual Social Network' — those aged 20–25. These generational scenarios bring different perspectives of the future, some good and some not so good! The final chapter in this section explores the feminisation of travel and business in China as a result of urbanisation, educational attainment and the changing roles of women in society.

What If?

In this section we explore how circumstances could influence or impact on the growth of world tourism in the future, whether climate change or the tourists' lack of trust in governments and their need for personal security. In Chapter 21, we look at how, post-9/11, the United States has found itself cornered by the dual crisis of security and lack of trust, which has fundamentally challenged the visions of the world because companies and individuals are seriously concerned for their

physical security and anxious about the future. Consequently, tourists to the United States now have to prove beyond any reasonable doubt that they are who they say they are before entering the country. These precautions, in turn, have made potential tourists wary of travelling to the States and have impacted upon the destination's branding. This chapter explores in detail how this could seriously damage America's image abroad and lead to the failure of tourism in the United States.

In Chapter 22, I explored the impact of global warming and climate change and how it will change the tourism products in several destinations; just imagine the French Alps without snow and skiing! Countries such as the Seychelles will not exist because they will have been submerged by the sea and the desertification of Crete will make it a harsh and unattractive land. What we are saying is that destinations cannot ignore climate change, because tourists' choices will be shaped by the environment in 2030.

In Chapter 23, we explore the trend of the *Assault on Pleasure* and the end of world tourism by 2030 because it will be deemed immoral by society, bad for the environment and too dangerous for individuals to participate in. At present, there is an ongoing debate about tourism and sustainability and any outcomes from this discussion could curtail the growth of world tourism in the years leading up to 2030. If the New Puritans have their way, then the world may be driven by a fear of the future and the myth of decline.

And Finally...

In Chapter 24, I have advised how to make the trends and drivers that are explored in this book come alive by using the Future Foundation's future-proofing technique. By incorporating such techniques you can adapt what you do and how you market your product to encompass future trends.

Concluding Remarks

In 1950, 25 million people took an international holiday; by 2030, we predict that 1.9 billion people will take an international holiday. How the world will have changed in this period! But holidays are about experiences as well as places, whether horse-riding in the Wild West or skiing down a mountain in Afghanistan. The places may change but the experiences will be fundamentally the same. But there will be more tourists from different countries who want to enjoy themselves. The only difference between 2005 and 2030 is that holidays in Outer Space will be more accessible!

Remember to visit www.tomorrowstourist.com for further details, trends and scenarios related to this book.