

TOURISM 2023: vision, scenarios and strategy for a sustainable UK outbound travel and tourism industry

Understanding and defining our future

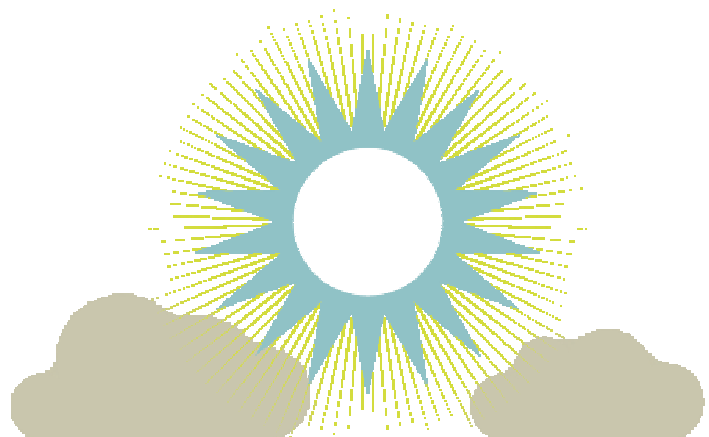
Project overview

There are many future challenges for tourism and tourists - from climate change to changing customer expectations and new markets. These are challenges for the outbound industry and for the destinations that customers visit. Tourism 2023 is a project that aims to help the UK outbound industry and some of its key destinations understand more about their future and be able to plan for it. It will explore questions like how to deal with climate change, pressure on resources like water and what the UK customer might be looking for in 15 years time.

Forum for the Future, a leading sustainable development charity with a track record in futures thinking, will deliver this crucial piece of work for the industry. It is supported by a number of key players – TUI Travel, Thomas Cook, ABTA, The Travel Foundation, Carnival UK, The Co-operative Travel and British Airways.

The project will create future scenarios for the industry that will explore different possible futures. These will enable the industry to develop strategies that work in each scenario and respond to future trends. In each scenario, as well as exploring a wide range of different future possibilities at a general level, we will focus on three separate destinations and explore what might be happening. These specially selected destinations will be able to see how they fare in each scenario and the different challenges they might face. They can then start to future proof their development strategies through this project. The project will go on to create a vision for the future of UK outbound tourism that will enable the travel industry to know what it's aiming for in terms of sustainability and develop a clear route map for the industry, and government, to take towards a successful and sustainable future.

The whole process will be collaborative across the industry and will include representatives from tour operators and travel agents, retailers, modes of transport and destinations.



What TOURISM 2023 will achieve

Tourism 2023 aims to deliver a shared view of the future challenges that the industry faces and what the industry, and key players within it, need to do to be future proofed.

It will do this through delivering four key **outputs**:

- A set of scenarios exploring future uncertainties
- A top-level and future-proofed vision of a more sustainable outbound tourism industry
- A top-level and future-proofed strategy/ road map to achieve the vision, with shared buy-in for taking it forward, with some ways of measuring progress against the strategy. This part of the project will draw on existing initiatives to ensure that it builds on existing efforts
- A prioritised set of future factors relevant to the industry

The benefits for the industry from these outputs include:

- an overview of how future trends might affect the industry
- an opportunity to grapple, alongside the industry, with key challenges such as climate change. When talking about the long-term future, people are often willing to discuss important or sensitive issues more positively, focusing on solutions
- an awareness of future possibilities
- an understanding of the possible directions that the UK industry might take and where more effort is needed to get to a more sustainable future
- clarity on what sustainable tourism looks, sounds and feels like
- a way of collectively engaging with, and influencing, government
- space to think through the unthinkable, such as how the industry might deal with restrictions in the number of leisure flights.

The methodology

Forum for the Future has over ten years' experience in developing challenging visions of the future through consensus and dialogue. Visioning and scenario-building are straightforward but involved processes that require extensive consultation. The Tourism 2023 approach can be summarised as:

- desk research and expert interviews with funding partners and other key stakeholders. These will capture key trends, build on existing work and frame and validate our work.
- a series of industry workshops (four in total) where the vision, scenarios and strategy are developed and tested.
- production and dissemination of the scenarios, vision and action plan/strategy through a well-designed report and launch event.

In order to ensure that the project outputs are in line with expectations, we have established an Advisory Board and project Steering Committee. The project began in June 2008 and is expected to end in June 2009 (please see separate project timeline).



About Forum for the Future

Forum For The Future would be the main deliverer of this project. Forum for the Future is a sustainable development charity. We work in partnership with over 120 leading organisations in business and the public sector. Our vision is of business and communities thriving in a future that's environmentally sustainable, economically prosperous and socially just. We believe that a sustainable future can be achieved, that it is the only way business and communities will prosper, but that we need bold action now to make it happen.

Our work in tourism

Forum for the Future has dedicated expertise in sustainable tourism that includes working with First Choice holidays, Virgin Atlantic/ Holidays, BAA, FirstGroup, Eurostar, the Minoan Group, VisitBritain and South West Tourism. This work means that we understand how tourism works and what the impacts are.

We focus on four areas:

- Influencing tour operators' core strategy - We work in partnership with major tour operators such as First Choice Holidays to help them become sustainable and profitable at the same time.
- Creating working examples of sustainable holiday developments - We are working with the Minoan Group to create a sustainable tourism development in Crete.
- Encouraging local sustainable tourism – through our work with South West Tourism and Visit Britain.
- Developing sustainable forms of travel – through our work on sustainable transport.

Our futures work

The future's not what it used to be. A well-worn phrase perhaps, but truer than ever. The world faces greater uncertainty as the climate changes, supplies of natural resources diminish, and global population and consumption rise.

We can't predict the future, but we can think more about the sort of future we want, and how it could be achieved. In fact, it is vital that we do just that. That's why futures thinking underpins our approach to promoting sustainable development. We build future scenarios, explore new trends, create visions of a sustainable future and develop future-proofing tools.

The Forum's partnership-based approach helps us to embed futures thinking in organisations and ensure that it connects with current strategy. In the past year we have used futures thinking with a wide range of organisations including RWE, Unilever, Tesco, Groundwork UK, Hewlett Packard, Advantage West Midlands and Cheltenham Borough Council. We also link directly to the leaders of tomorrow, through our Future Leaders Survey with UCAS.

Recent examples include:

Retail futures – supported by Tesco and Unilever. The project delivered four scenarios for how the UK retail sector might look in 15 years time, to be used to help guide future sustainable development strategies.

<http://www.forumforthefuture.org.uk/retail-futures-2022>

Low carbon living 2022 – The website explores how UK lifestyles could change in the next 15 years to become low carbon lifestyles. A low carbon Britain doesn't have to mean cutbacks and sacrifice. Climate change is an enormous challenge. But if we respond in the right way, many of the changes we make could improve our quality of life. The result is a set of visions for local carbon living. We've also come up with a set of nine new products and services that could help us lead low carbon lifestyles in the future.

www.lowcarbonliving2022.com

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