

In this special edition of FORESIGHT we take a look ahead to the middle of the next decade, examining some of the factors that look set to determine the shape and nature of the UK tourism industry over the next five to ten years. We do this by exploring current and potential future trends based around a series of 'topic areas'. Rather than make precise predictions about the future we pose a series of questions in relation to each topic area, thereby engendering thought and debate about the forces, both within and external to the tourism sector, that will determine its ability to thrive in the years ahead.

Introduction

There can be little doubt that one of the pivotal events set to shape the vitality of the UK tourism industry in the next few years will be hosting the London 2012 Olympic Games and Paralympic Games. This is one of the topics discussed here, but there is a great danger in assuming that it is only the London Games that will determine success or failure – a whole host of factors, some within the control of the tourism sector and others over which we have no control, will be equally influential in defining the vibrancy and form of tourism during the next decade. The topics considered cover a wide spectrum, but it is recognised that the list is by no means exhaustive given the enormous range of variables that underpin tourism demand and supply.

Topic: Competition and the changing market place

Back in 1980 the UK attracted 6.5% of international tourism receipts, but by 2005 this had fallen to 3.8% despite the UK attracting record numbers of international visitors. There are many reasons for our declining market share, but uppermost are shorter length of stay and consequent declining spend per visit for inbound visits to Britain, along with the rapidly expanding array of destinations on offer to international tourists. As more and more destinations become accessible and governments around the world realise the potential that tourism can provide as a means of employment generation and economic vitality we are witnessing increased public funding invested in marketing countries both small and large. Meanwhile funding for VisitBritain's international marketing has fallen by 22% in real terms between 1995/6 and 2005/6.

Another consequence of growing competition, and the availability of low-cost air routes, has been a sharp rise in the propensity of Britons to take overseas trips (more than doubling between 1990 and 2005) thereby helping to turn an international tourism balance of payments surplus of £571m in 1985 (at 2005 prices), into a deficit of £17.9bn twenty years later.

The international tourism market will get more cluttered not less in the years ahead. Potential visitors will be bombarded with destinations and their increasingly sophisticated brands and products. We will need to be as creative as we are technologically advanced if we are to keep Britain on the global radar.

People will have more and more diverse interests, and travel will develop more and more to be about the experience and participation. Niches are the future. Borders will be less important as special interest can happen anywhere. It will be the immersion and passion that counts above the destination itself.

Questions

China and India are set to be the world's largest and third largest economies within a generation or so, meaning that citizens of each will enjoy increased living standards and the opportunity to partake in international travel for the first time. Will Britain be 'front of mind' for these 'first time' travellers or will other destinations, with preferential funding, capture their imagination and thus further diminish our global market share?

The UK (and to an extent Ireland) has been a beneficiary of being at the forefront of low-cost route network development. However, as point-to-point networks develop across mainland Europe, and indeed in Asia, consumers will face increased choice regarding destinations for holidays and short breaks at low prices. Will our perceived expensiveness cease to be partly offset by competitively priced fares as the low-cost model spread to other regions of the world?

Can a single Britain Brand be positioned such that we are the 'destination of choice' for the multitude of experiences that the visitors of tomorrow will seek, and how will we ensure the consumer's attention is attracted to our campaigns as opposed to those of our competitors?

Topic: Capacity Considerations (Transport)

Britain's transport infrastructure is never far from the headlines, be it Heathrow's inability to cope with fog or the perennial problem of 'leaves on the line'. In the past few years we have seen significant growth in the number of inbound visitors coming to the UK, with this being possible courtesy of the rapid expansion in flights to provincial airports and (back in 1994) the opening of the Channel Tunnel.

It is insightful to look at airport usage over the period 1996 to 2005 – the number of passengers handled at Stansted jumped from 1.2 million to 22.0 million, almost exclusively as a result of the rapid growth in low-cost route networks from near European destinations. Meanwhile at Heathrow, our key global gateway airport for medium and long-haul destinations, the number of passengers handled increased from 55.8 million to 67.7 million, constrained by the lack of terminal and runway capacity to permit faster growth.

Terminal 5 is set to open at Heathrow at the end of March 2008, with plans to demolish Terminal 2 and create a new Heathrow East Terminal on the site of T1/2/3. The update of the 2003 Aviation White Paper recently reaffirmed the Government's intention to see a second runway at Stansted sometime in the middle of the next decade, with consideration then given to a third, short, runway at Heathrow if environmental impacts can be sufficiently mitigated.

The much delayed Airbus A380 should be a common sight at Heathrow by the middle of the next decade, bringing anywhere between 555 and 800 passengers per touchdown depending on aircraft configuration. This will allow the airport to handle increased passengers airside, but

clearly both landside Terminal facilities and access/egress transport infrastructure surrounding the airport will need to handle the increased passenger flow if full advantage is to be taken.

The second phase of the Channel Tunnel High Speed Rail link will open in November 2007, reducing journey time from France and Belgium to the new St Pancras terminal in London by 20 minutes. This will see a step change in Eurostar reliability and performance, and open up connections to the Midlands, North of England and Scotland from St Pancras, Kings Cross and Euston stations.

The modernisation of the West Coast railway from London to the Midlands, North West and Glasgow continues to progress, but recent analysis by the National Audit Office has suggested that it will not be able to cope with the expected increase in passenger demand during the next decade.

On the roads the government has signalled its intention to allow increases in fuel duty, and is encouraging local authorities to consider road-pricing options ahead of the introduction of any national scheme at some point in the future. One million people may have signed a petition against road pricing, but a petition won't solve traffic congestion, and if there is a general 'greening' of attitude then building more roads or adding lanes to existing highways in order to reduce congestion does not appear to be a palatable alternative.

Questions

One of three things must happen for aviation demand and supply to be in equilibrium over the longer term. New runways will be built, air travellers will pay higher prices as the existing stock of landing slots become more valuable, or the longstanding relationship between increasing economic wealth and the desire to travel will break down for some reason. Which of these options is likely to emerge as the answer over the coming years? Will the government be able to withstand the clamour by environmental groups to stifle growth in aviation and push ahead with runway construction in the South East of England?

Hitherto un-congested airports (and the surrounding skies) favoured by low-cost operators may become congested by the middle of the next decade – there may not be many more years left during which 'spare' airport capacity can accommodate additional flights – but is the development of regional airports at the expense of our international hub airport the best solution considering the difference in spend per visit for short-haul and long-haul visitors?

Will congestion on the roads and rails discourage Britons from taking domestic leisure trips or will a pro-car lobby force policy makers to give the green light to additional road capacity being built? If current government intentions come to fruition will the tourism industry voice be heard loud and clear in the design of any national road-pricing scheme? A further question concerns whether there will be different impacts for tourism businesses located in city centres (with good public transport links) and those in rural areas (where car may be the only option)?

Topic: Capacity Constraints (Asset utilisation)

Here the issue is rather different, it is not that there is a lack of capacity, rather it is that capacity in certain sectors is under utilised, often due to the seasonal pattern of tourism activity. For example, the 2005 UK Occupancy Survey reveals that bedroom occupancy across the year stood at 59%, or in other words more than two-in-five bedrooms were unoccupied on the typical

night. Looking at different types of accommodation, hotels had the highest bedroom occupancy at 62%, guest houses had occupancy of 53% and B&Bs just 47%.

There is a growing tendency for friends and families to 'eat out', witness the growth in 'Oriental Buffet's' etc. While this does mean growth in the hospitality and catering sector we could be heading for a capacity constraint in the not too distant future. Consumers are also demanding higher quality fare when eating out, expecting food to have been prepared on site and to contain local produce.

Questions

Is the low level of bedroom occupancy indicative of a business model that can deliver prosperity in the long term? Are profit margins so low that a large number of 'life style' B&Bs will never opt to invest in becoming Quality Accredited or the latest technology for handling reservation enquiries and bookings?

Will tighter 'points based' immigration rules inhibit the ability of the hospitality industry to cater for growing ethnic tastes as insufficient numbers of chefs with specific culinary skills are permitted to enter the country? More fundamentally, will a general shortage of qualified chefs emerge in the next decade, meaning that consumer desire to eat quality meals at 'smoke free' pubs will be incapable of being met?

Indications are that the minimum wage will now increase at a slower rate than in the past few years, but many jobs in the tourism industry are currently filled by immigrants from Eastern Europe – can we expect this flow of workers to continue for the foreseeable future?

The growing proportion of front line staff working in British tourism who come from Eastern Europe poses another dilemma – what does this mean for the 'Welcome' visitors receive at hotels and tourist attractions? Could issues of staff churn and linguistics make it increasingly difficult and costly to deliver training programmes that ensure those greeting visitors offer the warmest possible welcome, and how 'British' will the welcome that inbound visitors receive actually be?

Topic: Climate Change and the Environment

If we accept that climate change will become a reality in Britain then we can paint two very different pictures of what tourism might look like half a century from now. The 'gloomy outlook' would see seafront properties being uninsurable as sea levels rise, water shortages each summer denuding the attractiveness of Britain's gardens and parkland and the risk of skin cancer keeping people away from sun soaked beaches. Whereas the 'sunny outlook' might result in Mediterranean destinations being shunned by tourists due to excessive heat, with Britain's resorts taking on the mantle of the place to go for sun and beach holidays. In the countryside winery tours would become popular as some current crops are replaced in favour of vineyards.

According to the Met Office 2006 was the warmest year on record in Britain, but was also a year in which another of the anticipated characteristics of climate change, namely more extreme weather events, became increasingly common, be this severe gales, extreme heat or torrential downpours and tornados.

The Prime Minister recently proclaimed the Stern Review to be the most significant report to land on his desk during his term as Prime Minister. This looked at the economic implications of climate change, and in particular the costs of 'doing nothing' to reduce the speed at which climate change is taking place.

The UK Climate Impacts Programme model predicts that the average temperature in Britain will increase during the next century, there will be more very hot summer days, fewer very cold winters, sea temperatures will increase, there will be more rainfall in winter, especially spells of very heavy rain, but less snowfall. Many environmentalists would argue we are already seeing immediate impacts of a change in our climate, and that this change is happening far faster than has been forecast.

Although dominating the agenda at present, climate change is not the only environmental issue likely to touch tourism businesses in the coming decade. Consumers are becoming more proactive in questioning the origins of products they buy and how they have been produced, for example Fairtrade Coffee, organic vegetables, types of timber used in furniture and so on.

Questions

Here questions centre on both what the direct impacts of climate change might be and on what the impact of 'policy response' adopted by government might be. We have already highlighted some of the potential direct implications of climate change (with our 'green and pleasant land' turning into one that is 'brown and dusty'), but with a focus on the next decade the more pressing issue is that of emerging government policies. UK political parties of every hue are currently trying to outdo one another to win the title of 'Most Green' with Gordon Brown citing environmental justification for his recent doubling of Air Passenger Duty.

The majority of airlines claim that APD is a very blunt instrument that will do little to lessen the environmental impacts of flying. Instead they are pushing for an early adoption of Carbon Emissions Trading within the aviation sector. The European Commission recently said it planned to bring airlines into such a scheme for intra-EU flights by 2011 and all flights to/from the EU by 2012. However, this will require the agreement of all EU governments and remains a highly uncertain eventuality, at least in the next few years. Should European National Tourist Offices and the wider tourism industry join together in encouraging such a policy rather than allowing arbitrary taxes to be imposed by individual governments?

What is the best way for the benefits of airborne inbound tourism to be secured, and indeed grown further, while minimising the environmental impacts of aviation? Will 'green' issues be used in order to delay or defer decisions regarding airport capacity, or will a technological solution be found that makes flying far less environmentally unfriendly than its detractors allege it to be?

Another uncertainty surrounds consumer behaviour. Will consumers adopt an anti-flying attitude as environmentalists focus their efforts on thwarting growth in air travel? If so, will consumers in the UK be more or less 'green' in their behaviour than nationals of other countries?

If UK consumers do begin to fall out of love with flying should domestic marketing campaigns take advantage of this trend through 'be green – stay in England' messaging? It could be that consumers, both here and abroad, choose to keep on flying, but make fewer trips during the

year, choosing instead to stay longer at a single destination in order to gain a deeper insight into its culture. If this happens we might see a reversal of the trend that has dominated international tourism in the past generation for consumers to take an increasing number of trips but with a declining length of stay.

Finally there is the question of changes in corporate behaviour. This could come about through fiscal measures whereby organisations are forced to pay carbon offsets when members of staff take business flights, or through businesses feeling the need to respond to public pressure on 'green issues' and voluntarily finding ways of using air travel less often? How strong will the need for 'face to face' meetings be perceived to be in the middle of the next decade, by which time the video phone may be as typical a piece of 'business kit' as the Blackberry is becoming today?

Acting as an umbrella to all of this is the extent to which Britain can build our 'brand position' in terms of green credentials, and the degree to which other destinations, ranging from New Zealand to Sweden, will aim to attract visitors by virtue of adopting a 'sustainable' policy stance. Will consumers still be willing to fly, but increasingly insist that the goods they consume at their destination are produced locally using sustainable methods and ethical business practises?

Topic: Macroeconomics

Measured in terms of GDP per capita the population of the UK enjoys the 11th highest global standard of living according to IMF figures, and the economy has grown at or above its trend rate in every year since 1993. Perhaps no wonder then that increasing numbers of UK residents are responding to high profile advertising campaigns aimed at persuading them to part with their increased disposable income on overseas holidays and short-breaks.

Although economic growth in the UK is expected to remain healthy throughout 2007 there are a number of global concerns, for example a potential slowdown in the US, social upheaval in China derailing that nation's rapid economic expansion and the need for labour market reforms in numerous Eurozone countries if Europe is to be successful in competing with emerging economic powers. Closer to home a question mark remains over whether or not consumers are borrowing more than they can afford, be this for mortgages or consumer spending.

At present the main currency story in the headlines is the distinct possibility that early in 2007 we will witness \$2 to the pound for the first time in many years. This could act as a significant deterrent to high spending US visitors when considering their vacation destination. Many analysts believe that until there is a 'correction' in the US economy to overcome the private sector, Federal and most importantly trade deficits, the US Dollar is likely to remain weak. An exchange rate of \$2.20 to the pound is not considered impossible.

Focussing more on the middle of the next decade rather than the coming year, of greater significance will be any decision that the UK government takes in respect of adopting the Euro.

Again a development that is some years off, but may actually result in Sterling becoming far weaker than it is today, is the supply of oil and gas from the North Sea. As natural energy stocks in the North Sea begin to dwindle so too may demand for Sterling, as it ceases to be a 'petro-currency'. Clearly this may make the UK a more affordable choice for overseas tourists,

and act to dissuade UK residents from taking multiple overseas trips each year. If the UK were to adopt the Euro such an eventuality ceases to be on the cards.

Global oil stocks will still be sufficient in the middle of the next decade, but by that time increased attention may be being paid to the fact that they are indeed finite and that new discoveries are running at a much slower rate than current usage. We have seen in 2005 and 2006 that many airlines will impose fuel duty surcharges in response to higher oil prices, so if a step change in the price of oil does take place a decade from now, we can expect a similar change in the cost of air travel.

An issue that overlaps both macroeconomics and demographics is the so-called 'pensions time-bomb'. Recently the UK government announced that the retirement age will gradually be increased to 68 by 2044-46, with the 'carrot' to this 'stick' being the restoration of the link between state pensions and average earnings some time during the next Parliament.

As an increasing number of pensioners rely on taxes paid by those of working age a question mark hangs not just over whether tomorrows pensioners will be as well off as those of today, but also over the level of taxation required to fund pensions as average life expectancy continues to rise. This is by no means an issue just here in Britain; across much of Western Europe, Australasia and parts of Asia (notably Japan) governments are being forced to consider the affordability of welfare payments to a burgeoning elderly population.

Questions

Have we become too complacent about the strength of the UK economy and accompanying low levels of unemployment? If there were to be a housing market crash or economic recession in the next five to ten years what would consumers with less disposable income do less of - foreign travel, going out for meals, upgrading their iPod or saving for the proverbial rainy day?

If by the middle of the next decade Britain has adopted the Euro, what will this mean for inbound tourism? Will the removal of the currency exchange barrier encourage increased visitation from Eurozone countries, or will the increased 'price transparency' encourage Europeans to stay away as price differentials are not masked by exchange rates, reinforcing the UK's reputation as an expensive destination? Having a wad of Euros rather than Sterling in their wallets will UK residents be more inclined to pop across the Channel for shopping trips, thereby worsening further out international tourism balance of payments deficit?

Improvements in life expectancy, general health in old age and a greater desire to remain active in later life are all big positives for tourism prospects in the years to come, as a new cohort of retirees look at ways of spending their newfound leisure time. However, to what extent will pensions, both state and private, be capable of funding the lifestyle that this group would like to enjoy?

Topic: Demographics

The shift in the age-profile taking place in many countries was discussed in the section on Macroeconomics (indeed it is forecast that there will be more than a million residents of Japan who are aged 95 or older by 2028) but there are other demographic trends that may influence tourism in the next decade, for example increased 'inter-generational' travel whereby

grandparents take their grandchildren on holiday, more older 'singles' due to higher rates of divorce, and more 'same sex' couples, all with their own distinct requirements from tourism businesses.

As older people become ever less inclined to be sedentary during retirement a further factor that will grow in importance for the tourism industry will be ever-growing numbers of old people with disabilities, even if those concerned do not view an impairment as a disability as such. It is extremely likely that a larger proportion of customers will need some form of assistance in the years ahead, not just 'step free access', but facilities and attitudes that aid independently minded older customers with mobility, eyesight or hearing difficulties to continue taking independent holidays.

Questions

The stereo-typical holiday unit (mum, dad, two children) will still exist in a decades time, but so too will many other types of travelling unit, the tourism industry will need to respond to a changing society, but how responsive will be the attitudes among owners of many micro-businesses be?

Will tourism businesses recognise the opportunities on offer to them if they opt to invest in making their business fully accessible to increasing numbers of independent older travels with a range of 'disabilities'?

Both older and younger generations are likely to be typified by a growing desire for 'experiences', and one potential consequence is that more people will take 'gap years', not just at the traditional pre or post university phase, but potentially mid career. What opportunities does this offer the tourism industry – either through the creation of potential customers or a potential pool of volunteers/recruits?

Topic: Digital/Distribution

This is an area of fast moving developments, with new technological applications that are today virtually unheard of becoming as ubiquitous as the mobile phone within a decade. Some concepts will fail to be adopted by the masses while others will play a major role in the way tourists will access information, book their trip and experience their destination.

There seems little prospect of the trend towards people living their life through a screen abating in the foreseeable future. On the positive side this will mean it should become easier for potential and actual visitors to access information when they need to, being able to book accommodation, tours and travel from wherever they happen to be rather than being forced to hunt down a TIC or drive around looking for a B&Bs with a 'Vacancies' sign outside.

The 'Travel Guide' is likely to evolve markedly during the coming decade – it is already becoming more common to see marker posts at some attractions with a phone number that you dial up from your mobile to access detailed information about the sites 'story'. Within the next few years it is probable that not only will the visitor be able to listen to an audio guide on their own mobile, but see a customised video guide/podcast on their handheld device too.

These developments should make life more convenient for the tourist and enable them to gain a tailored, deeper experience, providing new and exciting opportunities for those in the business of delivering information to visitors.

Not all technological developments represent good news for tourism prospects. As the cost and ease of communicating face-to-face, in business or for leisure, become less of a barrier through services such as Skype, the need for some trips may diminish as colleagues or groups of friends 'meet up' without leaving their respective offices or homes.

Marketing is becoming increasingly sophisticated, but so too are consumers, with the Internet facilitating a new form of marketing or 'advocacy', namely 'word of mouth' recommendations. Websites such as www.tripadvisor.com are becoming more and more important in terms of gaining insight into destination and accommodation options before consumers make a booking, and the danger is that empowered consumers may increasingly sideline advice from traditional purveyors of tourist information, relying more heavily on advice from fellow consumers.

Communications technology has been used to organise spontaneous events involving scores of people who have never met one another before, the so-called 'flash-mobbing' phenomenon. There will doubtless be other types of activity that are 'invented' by the public in the coming years, some of which may have implications for tourism businesses.

Questions

Who or what will be a trusted source of information for travel and tourism advice by the middle of the next decade – a 'National Tourist Board' or a website that only accepts user generated content? Can those responsible for delivering tourism information about the UK be 'ahead of the game' and ensure that information is provided in a fashion demanded by visitors, but is still 'authoritative', 'unbiased' and only covers 'quality assessed' properties?

To what extent will technology take away the need for travel, either for business or for leisure, and replace it with a 'virtual' get-together of friends and relatives?

In the drive towards adopting the latest fashion for communicating information, will a growing number of potential tourists both at home and abroad become 'excluded', if they do not have access to the appropriate technology, or cannot access it due to reasons of disability?

Phenomena such as email spam can only get worse. As more and more people work from home and are tied to computers all day every day, many feel there will be a backlash against technology and an increasing need for human contact. This is particularly true with tourism where there is a real need to welcome people into a destination. How concerned should we be that the industry itself will become a less human environment: computer-based, not people-based?

Topic: The London 2012 Olympic Games and Paralympic Games

It is now only five and a half years before the opening ceremony of the London 2012 Games. VisitBritain has estimated that the Games offer an unprecedented opportunity to boost inbound tourism to the UK over the next decade by nearly £2bn. Demonstrating the 'legacy' that the Games should deliver it is forecast that 17% of this will accrue in 2012, with 16% generated in

the years ahead of the Games but the overwhelming majority (67%) of additional inbound tourism revenue falling in the period 2013-17.

These benefits are forecast to arise courtesy of extra 'sports tourism', increased numbers of business visits and, particularly in the post Games period, extra holiday visits to the UK thanks to increased awareness of what London and Britain has to offer.

Questions

The projections set out above demonstrate 'potential', but they will not materialise out of thin air. For the UK visitor economy to enjoy the full benefit of the London 2012 Games it will be necessary for all involved in tourism in Britain to plan and invest in order to ensure that the Games are both an enormous sporting and 'PR' success, as a result of which overseas residents feel Britain is a 'must see' destination, with a fabulous array of experiences, welcoming people and, although it might not be the 'cheapest' holiday option, its the one that offers the best 'value' for money. So, rather more of a 'challenge' that needs to be risen to rather than a 'question' to be asked is whether all involved in promoting and delivering tourism choose to do their utmost to ensure success.

Topic: Geopolitics

In many respects this section deals with the true unknowns, many of which will never trouble the radar, but some of which may turn out to be influential in determining prospects for both inbound and domestic tourism in the decade to come. A number of questions are posed below, but perhaps the key insight should be that despite our best efforts to crystal ball gaze its highly probable that some of the most pivotal events set to unfold during the years ahead have not been foreseen here.

Questions

The great uncertainty is the extent to which acts of terrorism will influence the decisions of tourists, be these acts of terrorism in Britain or elsewhere. There has been a trend towards tourists becoming more resilient and accepting that terrorism is, in reality, exceptionally unlikely to impact directly on their trips. However much we might take comfort from this trend we cannot rule out a future act of equal magnitude to 9/11, an event that dented international tourism across the globe for well over a year. How successful will the authorities here and abroad be in thwarting potential acts of terrorism, and how tolerant will tourists be of both the risk of terrorism and the increasingly stringent security measures imposed at airports in response to the threat?

On this note what new measures can we look forward to in order to 'secure our borders'? The government has said that biometric visas will be in place within the next eighteen months, and there is a high probability that the cost of getting a visa to visit Britain will be increased in the months and years ahead. Potentially as big an issue as the cost of getting a visa will be the hoops through which potential visitors need to jump in order to obtain a visa in the first place. How ready will the government be in ensuring that biometric information can be given at a wide range of centres at convenient times of day for the budding visitor?

Regardless of any impact from terrorism, will there be a surge in religious/cultural polarisation during the next ten years, meaning that high spending Arab and Moslem markets will think twice about choosing 'Western' destinations for business or leisure?

Tied in with the changing shape of global economics China can be expected to become increasingly influential on a global political stage in the future. Is Britain ready for China as an economic and political powerhouse? Just how many of the forecast 100 million outbound trips from China by 2020 will be destined for Britain, and will we be ready in terms of meeting the cultural and linguistic needs of these 'first time' visitors?

What will the next global health scare be? In the past few years we have seen SARS, West Nile Virus and most recently the threat of Pandemic Flu. Many epidemiologists believe that a pandemic flu outbreak at some point in the coming decades is inevitable, and, at present, the most likely source is thought to be a mutation in the H5N1 strain, commonly known as 'avian flu'. In 2006 there were at least 116 cases of avian flu in humans, of which 80 were fatal.

If a global human flu pandemic occurs how devastating will it be for inbound and domestic tourism, and how quickly will tourism recover in the months that follow an outbreak?

Will the UK witness increased steps towards devolution by the middle of the next decade, and will fragmentation of destination identity and regionalisation of the tourism product within Britain and across Europe make holistic marketing of the Britain brand abroad increasingly difficult?

We have touched on the possibility of Britain adopting the Euro as its unit of currency in the next decade, but could a pro-EU government also take the plunge and decide that Britain should adopt Central European Time thereby delivering an extra hour of daylight on summer evenings, thereby delivering a definite fillip to the UK tourism industry?

Conclusions

Many questions about the future have been asked in the preceding discussion, with few real 'answers' being offered. However, it is clear that many forces, some of which we already know about, some that are starting to emerge today and some we cannot yet foresee, will be hugely important in helping to determine the shape of tourism in the middle of the next decade. There are a plethora of issues that both public and private sector tourism stakeholders need to tackle in the coming years in order to ensure that the industry is able to play at the top of its game in the years surrounding the 'once in a lifetime' opportunity that is the 2012 Olympic Games. In addition the industry must be ready to respond to rapidly changing consumer behaviour and expectations, and to respond effectively to the inevitable squalls that will take us by surprise.

Feedback

Please feel free to get in touch if you think there are significant strands that have not been touched on here, or if you think that a future edition of Foresight should be devoted to an in-depth analysis of one of the topics covered – email david.edwards@visitbritain.org.

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Issue 1	November 2003	Market Focus	Issue of the Month
Issue 2	December 2003	USA, Canada and Mexico	Implications of an ageing population in Britain
Issue 3	January 2004	France, Italy, Portugal and Spain	Airport capacity in Britain
Issue 4	February 2004	Poland, Russia, China and South Korea	Visits to Britain by British Nationals living overseas
Issue 5	March 2004	Britain	School holidays and their impact on seasonal spread
Issue 6	April 2004	Australia and New Zealand	West Nile Virus
Issue 7	May 2004	The EU Accession States	The Internet Part 1: Consumers
Issue 8	June 2004	South Africa, Nigeria, Kenya and Ghana	The Internet Part 2: Businesses
Issue 9	July 2004	India and Pakistan	Trends in Cross-Channel Travel Behaviour
Issue 10	August 2004	Belgium, Netherlands, Luxembourg and Ireland	Cost of visiting Britain compared with other destinations
Issue 11	September 2004	Japan, Hong Kong, Philippines and Taiwan	What might climate change mean for tourism in Britain
Issue 12	October 2004	Brazil, Argentina, Chile and Venezuela	London's Olympic Bid – implications for British Tourism
Issue 13	November 2004	Norway, Sweden, Denmark and Finland	Smoking in public places
Issue 14	December 2004	Britain	Outlook for inbound tourism to Britain in 2005
Issue 15	January 2005	UAE, Saudi Arabia, Kuwait and Iran	Inbound tourism and the value of Sterling
Issue 16	February 2005	Germany, Austria and Switzerland	Britain's ethnic diversity
Issue 17	March 2005	Malaysia, Thailand and Singapore	Britain's transport infrastructure
Issue 18	April 2005	Greece, Romania, Bulgaria and Croatia	Foreign Direct Investment & inbound business tourism
Issue 19	May 2005	Israel, Egypt and Turkey	Inbound study visits
Issue 20	June 2005	Poland, Czech Republic and Hungary	Low-cost Airlines
Issue 21	July 2005	USA, Canada and Mexico	Weddings, Stag Weekends and Hen Weekends
Issue 22	August 2005	France, Italy, Spain and Portugal	The Day Visit Market
Issue 23	September 2005	Latvia, Lithuania, Estonia, Ukraine and Belarus	Quality
Issue 24	October 2005	Russia and China	Daylight Saving
Issue 25	November 2005	Australia, New Zealand and South Africa	Outlook for Inbound Tourism in 2006
Issue 26	December 2005	India, Sri Lanka and Bangladesh	Twenty-five years of Inbound Tourism
Issue 27	January 2006	Benelux and Ireland	Tourism Satellite Accounts
Issue 28	February 2006	Japan, South Korea and Hong Kong	Tourism and the Disability Discrimination Act
Issue 29	March 2006	Brazil, Argentina and the Caribbean	Tourism and the National Lottery
Issue 30	April 2006	Nordic region and Iceland	Next generation aircraft
Issue 31	May 2006	Central Europe	The cruise line boom
Issue 32	June 2006	UAE, Kuwait, Bahrain and Oman	The power of football
Issue 33	July 2006	North Africa, Malta and Cyprus	Wind Farms and the Visitor Economy
Issue 34	August 2006	Inbound tourism - the global context	International tourism balance of payments deficit
Issue 35	September 2006	Singapore, Malaysia and Thailand	Inbound visitor decision lead times
Issue 36	October 2006	Greece, Turkey, Bulgaria and Romania	Seasonality
Issue 37	November 2006	Inbound visits by the over 55's	Outlook for Inbound Tourism in 2007
Issue 38	December 2006	USA and Canada	Second homes
Issue 39	January 2007	Ferry passenger visitors	Accommodation choices
Issue 40	February 2007		

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