Welcome

Scottish Tourism has been one of the economic and social success stories of the last 50 years. From 1969 to 2019 there has been an exponential growth in trips, expenditure and in the nationalities of visitors who experience our tourism offering. What can we expect for the next 50 years? What will be the drivers influencing tourists and tourism in the year 2069?

In this, our Tourism Futures paper we are examining a vision of what Scottish tourism might be like in the year 2069. The OECD, in 2018 published their paper “Analysing Megatrends to Better Shape the Future of Tourism”. In their opening section they write:

“The future of tourism will be impacted by large-scale social, economic, political, environmental and technological changes, bringing new and often unseen challenges, threats and opportunities. These “megatrends” are slow to form, but once they have taken root, exercise a profound and lasting influence on human activities, processes and perceptions, including tourism.”

Futurist Alvin Toffler once said “Nobody knows the future with certainty. We can, however, identify ongoing patterns of change.”

The aim of this publication to examine the consensus view on the megatrends that will be influencing society and therefore tourism over the next fifty years. Based on these megatrends, a composite vision of how Scottish Tourism could develop. Our vision spotlights what Scottish tourism might be like in 2069. And we also examine what could go wrong…

Like Toffler, we are not predicting the future, only a future. However, as attributed to Peter F. Drucker, author of the Effective Executive said “The best way to predict your future is to create it.”
Megatrends – Drivers of the future

How do you predict what the world will look like in 2069? To paraphrase Toffler again...“no one knows for certain”, yet effective policy development and planning necessitates the need to think about the future. To achieve this seemingly impossible task requires **Strategic Foresight**.

In our world today, which appears unpredictable, filled with doubt and scepticism, it would seem counter-intuitive to be looking ahead 50 years. But it is because we want to challenge the barriers and embrace the opportunities that will present themselves in the years hence we need to view the distant, yet changing horizon. Strategic Foresight isn’t about predicting an accurate forecast of what the future will be. It’s an opportunity to put aside our pre-conceptions and test, challenge and question our assumptions to make informed decisions today for a better future tomorrow.

While there are various methods by which you can gather and develop your megatrends, it is generally through the collected knowledge of academics, experts, visionaries, civic and business people that a consensus view of a sector or geography is determined. A megatrend is a ‘slow-burn’ movement or change that could develop, establish or embed within society.

In this paper we have examined the published megatrends from various public and private sector bodies across a range of industry sectors. The results presented are based on a composite view of these future looking views which represent the catalysts which will be exerting an influence on society over the next decades.

Based on our composite view of the megatrends, we present our vision of Scottish Tourism in 2069. This scenario is a mosaic of vignettes through which illustrate how the megatrends may develop within our visitor economy.
Defining the Megatrends

What are the megatrends? There are six main drivers that are widely accepted as being influential shaping society into the future. Each distinct but interconnected.

Population Growth
- By 2069 the world population is estimated to be 10.5 billion, 37% higher than in 2019. Distribution of this growth is however unbalanced.
- The North American population is expected to increase 26% and South East Asia 22% by 2069. In contrast, Europe is predicted to decline -9% by 2069.
- The change in population will create many potential economic opportunities. However there are also significant challenges over availability of global resources including food, water and energy supply.

Environmental Sustainability
- The impact of rising global greenhouse gas emissions and the effect of subsequent climate change are observed to be a major factor in a number of the published strategic foresights.
- Climate change is predicted to have varying consequences for many countries with poorer nations likely to be impacted most.
- Adaptation Scotland’s key long-term climate change trends for Scotland are:
  - Typical summer is hotter and drier / Typical winter-autumn is milder and wetter
  - Sea level rise
- We can also expect to see:
  - Increase in summer heat waves, extreme temperatures and drought
  - Increased frequency and intensity of extreme precipitation events
  - Reduced occurrence of frost and snowfall
- Opportunities will arise for nations who can develop and export solutions in renewable energy and low carbon technology
- Growing consumer awareness of their own individual impact on the environment will be shaped by their own personal experiences of climate change.

Aging Demographics
- According to the United Nations, the world’s population is ageing; virtually every country in the world is experiencing growth in the number and proportion of older persons in their population.
- By 2050, the global population of older persons is projected to more than double in size from that of 2015.
- Improvements in healthcare will find a more mobile and active older population.
- Issues over provision of social care and a declining working population will bring challenges to these changes in demographics.
Defining the Megatrends

Technology Adoption

- Advancement and investment in technology and infrastructure will be ongoing as global economic competition increases.
- Next generation digital will be wearable, augmented, virtual and fully integrated through the Internet of Things.
- Automation and Artificial Intelligence will change the workplace and home, raising ethical questions over rights and responsibilities but also liberating and creating new opportunities.
- Consideration of factors such as reliable green energy supply, ongoing skills development to adopt new tech and new consumer models around ownership will develop as there is a move from obtaining objects to renting or hiring them as needed to reduce the impact of consumerism.
- Travel will witness significant step change. By 2069, electric autonomous vehicles (from cars to flying taxis) will be ubiquitous and air travel will evolve in line with demands for lower emission travel.

Pacificisation of Global Influence

- By 2069, it is expected that the influence of China and India witnessed at the start of the century will prompt a shift in global political influence eastwards, around the Pacific rim.
- Trading blocs around Asia-Pacific, North America, Europe, and Africa will evolve, each with its advantages and disadvantages in terms of working populations, skills base, availability of natural resources and infrastructure.
- New economies like Indonesia and Singapore will be key drivers in the future creating new tourism markets for destinations around the world, including Europe.

Growing Urbanisation

- Not a recent phenomena, urban migration will continue through to 2060 around the world.
- Witnessing the depopulation of the countryside, many migrants move to cities for many reasons including job opportunities or education availability.
- This will lead to the continued growth of mega-cities already typified by Tokyo, Shanghai, Jakarta, Seoul and Manila.
- As populations establish, this will contribute to a continuing rapid expansion of the global middle class, with the subsequent increase in consumer demands for products and experiences such as travel and tourism.
- Cities will also adapt through structured planning and technology to improve local populations health and wellbeing.
Tourism in Scotland 2069

So how will Scotland and the Scottish visitor economy develop in the next 50 years? The following narrative is an imagined description of how the megatrends could influence the development of Scottish society and tourism in the year 2069.

It’s early June, 2069 and the change in the weather is being felt across the world. For many the rising temperatures are bringing thoughts of holidays, some to escape the heat in temperate destinations. Others are seeking meaningful experiences in travel and engage in culture, nature, heritage and activity.

For Scotland, the main focus for visitors this year is the 55th Anniversary of the launch of the television show Outlander. It remains a global phenomenon, its classic status and longevity driven by readily available digital download and continues to inspire visitors to see the filming locations and live the highland life.

Scotland in 2069, retains its historic and cultural heart with an international, contemporary outward looking population. The economy is driven by long established export products of fresh quality food and spirits, augmented with cutting edge wave, wind and tidal energy manufacturing which is in demand in the key markets of Asia and North America. Its temperate climate and friendly welcome ensure tourism is also a key export sector too.

Scotland is a country of two halves. The majority of the population, (like many other countries) resides in urban areas. For Scotland it is the Central Belt where the majority of the population reside. Edinburgh and Glasgow merged into a single mega-conurbation during the 2040’s. The “Edin-gow/Glas-burgh” mega-city sits along-side the substantial but smaller urban centres of Aberdeen/Tayside and Inverness/Elgin in the East and North.

While the rural Highlands and Islands and south of Scotland has to a greater extent been protected from over development through the expansion of initiatives as the national park network and the Economic Sustainability Initiatives, there remains a vibrant rural environment for the residents of artisans, creatives, agriculture producers, distillers and others which live in unity with the natural environment making for vast leisure area for domestic and international visitors. The many prosperous rural and island communities benefit from the extensive digital and transport infrastructure which allows remote home working, access to international trade to occur and enterprise to flourish without barrier or hindrance of distance from the cities.
Tourism in Scotland 2069

**Our Visitors** – In 2019, it was the mature tourism markets of North America, Europe and the UK that make up the majority of visitors to Scotland. Indeed, around 30% of international visitors to Scotland came from 3 or 4 countries (principally US, Germany and France).

Over the last 50 years to 2069 we see a greater diversity of nationalities with improved direct access, frictionless travel through digital visas and border checks. Destination promotion through targeted individual messaging is enhanced by hyper personalised marketing available through hyper-connected consumers. It is the travellers from the Far East that have seen greatest growth. Growing affluence amongst the middle classes of China and India are driving visits enhanced by visitors from new source markets such as Indonesia and Singapore. We naturally continue to welcome visitors from North America and Europe however product offering varies, acknowledging the demographic split that has been developing between a younger traveller from these new markets and a more mature yet active traveller from these established markets. The tourism industry understands these nuances, adapts accordingly through personalisation of experiences for the individual rather than providing generic products for all.

**Accommodation** – Scotland benefits from an eclectic mix of accommodation offerings. The heritage stock of castles, palaces, crofts and bothys conserve these historic landmarks that are found throughout the country. All are sympathetically and invisibly upgraded to incorporate the latest technology to ensure connectivity, carbon neutrality and deliver the maximum experience that visitors look for in their stay in Scotland.

It is within our mega-cities we see the greatest range of innovation in hospitality. Smart mirrors, robot butlers and AI chat-bots have been available for decades but continuous improvement has made these interfaces seamless in delivering the best human interaction in information provision. Personalisation extends to the hotel room, with 3D printing allowing the visitor to fully customise their facilities to meet their needs. Holistic health trends remain ever popular and the in-room fitness facilities such as static bikes not only improve your stamina but are contributing to sustainable energy generation of the building, and each watt contributed adding to your discount voucher for the restaurant. Healthy buildings dominate new architecture supporting the physical, mental and social well being of the residents and built environment. Vertical Gardens, natural light and multi user spaces add to the overall experience for guests and staff alike.
Tourism in Scotland 2069

Touring & Transport – How will visitors travel to Scotland and travel and tour around when they arrive? Since it unveiled its plans in 2018, Boeing’s Hypersonic airliners have been flying across the skies since their launch in the 2040’s. Capable of flying five times the speed of sound, it makes the New York to Edinburgh trip in around 2 hours, rather than the sedate 8 hours in 2019. Cruise tourism remains popular with many of the floating residence ships, these “cities of the seas”, stopping in the ports of Scotland for several days.

Those looking for a slower pace for their long distance travel might take one of the modern Airships that circumnavigate the globe at a more leisurely pace of aviation to the hypersonic airliners. Closer to home high speed rail connects the rest of UK, Ireland and mainland Europe through the various subsea tunnels and networks to the principle Scottish hubs providing convenience and comfort expected from travel in 2069.

For personal travel, the choices are flying taxis, established initially by Uber in the mid-2020's for getting around town. Following the consumer shift to the lease hire from purchase, Scotland’s urban and rural touring network is open to everyone through its integrated autonomous vehicle road network allowing the passengers to arrive safely at the destination and enjoy the views without requiring to drive themselves.

Adventure & Activities – Scotland in 2069 remains a world class destination for Adventure and Activities. With its long heritage in games design and technology, Dundee has become the global centre of eSports with thousands travelling to witness the latest interactive digital challenge from the sectors biggest stars.

More traditional activities remain popular, and with our milder climate Scotland’s open wilderness provides accessible challenges such as long distance walking routes and mountain-biking. Water based activities are a constant source of enjoyment for our visitors, especially those from the dryer regions of the world. Sailing, surfing and open water swimming (especially since the introduction of the stringent clean water acts of the 2020’s) draw crowds from all over. Growing in significance among thrill seekers and endurance junkies are the long distance underwater diving routes, such as the 180 mile Thurso-Kirkwall-Lerwick marine path. The affordability and availability of submersible tents mean that great distances can be covered without the need to surface.

Most recently, augmented reality (AR) fishing has grown as a favourite pastime on country estates. Increasing numbers of “eGhillies” help guests on an actual river to catch “virtual” salmon. The older generations concede the next generation haptic feedback rods mean you can’t differentiate it from when they went fishing for real fish.
Tourism in Scotland 2069

Space Tourism – Naturally the biggest breakthrough in transport, tours, adventure and activities are provided through the SpacePorts in Scotland. Based in Prestwick, Leuchars and Lossiemouth, they provide regular launches for low earth orbit experiences and weightlessness. Scotland’s higher latitude position also allows the much sought after Aurora flights where visitors can fly through the Northern Lights and experience them from within and above. Scotland also benefits from being a turn-around space port with access to the space hotels launched in the 2030’s which soon will provide access to the future colonies of Mars.

Attractions – High speed digital connectivity has revolutionised the attractions sector in 2069. Virtual and augmented reality raise interpretation to new and realistic levels. Visitors can immerse themselves in Court life in Dunfermline and Linlithgow Palaces. You can live within an episode of Outlander with 7D holographic characters passing by on the streets of Culross or Doune Castle. With reciprocal arrangements with other museums and galleries around the world our resident art and historic artefacts can be supplemented with artefacts or compositions by the same artist, school or historic period from other institutions by on demand holographic projection for a complete experience of a collection.

Events & Business Tourism – Events and Conferences are also utilising augmented reality to enhance experiences and improve connectivity. Within the events sector sporting events can include competitors on different continents competing against one another in real time. Truly spectacular global mega events may be staged in this way. Likewise, music festivals can occur in multiple locations with bands, band members playing live with holograms of themselves or their living or deceased band mates around the world.

The Business Meetings, Conference and Exhibition sector remains a valuable asset to commerce and the economy. With increased connectivity, the ability to meet in person is increasingly valued as the human interaction builds trust and collaboration. Personalisation and Agile Venues are the drivers of business tourism to deliver value and accommodate the widest variety of delegates.

Food & Drink – Food and water security in 2069 are constant concerns around the world. Again Scottish innovations are capitalising on our natural and inexhaustible resources. With the increasing demand and consumption of processed insect protein in our diets by 2069, the Midge is now a highly desirable delicacy to domestic and international markets…bring on the midgie haggis!
Black Swan Futures

What is the Black Swan?

A black swan is an event or occurrence that deviates beyond what is normally expected of a situation and is extremely difficult to predict.

Black swan events are typically random and unexpected. Therefore, it is important for people to always assume a black swan event is a possibility, whatever it may be, and to plan accordingly.

Source: Investopedia

Road to nowhere … Mad Mac’s Redux

Of course, there is always the possibility that the future may not be as bright as we would like to think. If we consider the possibility of unexpected or unpredictable events, it could send the future into an entirely different trajectory.

There are many anthropogenic and natural disasters which can alter the predicted course of the future. From flooding to civil unrest, solar flares, foot & mouth, pandemic flu and stock market volatility there are a myriad of catastrophes waiting to be unleashed.

Most recently there was the Sub-Prime Mortgage crises of 2007-10 which issued in the largest global economic slowdown ever seen, the effects of which continue to be felt today. There was also the eruption of the Icelandic Eyjafjallajökull volcano and subsequent ash cloud in April of 2010. This resulted in widespread air traffic disruption across Europe, and while relatively short lived had at the time raised concerns over the future of air travel in the region. Few individuals or organisations predicted these crises, let alone had preparations in place to mitigate against them.

Black Swans are unpredictable but can be prepared for. Organisations can establishing methods for identifying events, and prepare quick response strategies before the events occur. Through the process of developing a Strategic Foresight programme you can mitigate to the best of your ability some of the unknown events that are over the horizon.

Ultimately by taking a forward looking approach you can provide your organisation with a number of benefits including but not limited to reputation protection, a faster return normality and impact minimisation.
A Last Look Back to the Future

We have examined what megatrends may develop that will influence Scotland in the future and speculated how tourism will evolve to embrace these influential changes. Like today, the Scotland of tomorrow will continue to welcome the world with authentic, warm, inclusive, unique, inspiring, diverse, historic, cultural, modern and traditional visitor experiences that are memories in the making. Scotland is Now.

Did You Know?

In 2008, the David Hume Institute gathered 16 experts together to develop Visions of Scotland in 2050.

Among the authors were academics, environmentalists, business people and civil servants. They were asked to write essays as though they were looking back from 2050 and to assume that the Government had succeeded in its aim of cutting climate pollution by 80%. Their vision imagined...

“Scotland will be mostly vegetarian, will look after half a million climate refugees and its older residents will care for the younger ones in “community domes” to protect them from floods and heat waves. Scotland will have experienced in the past food rationing, hurricanes and lost low lying areas to the sea.

But the people in 2050 will be growing more of their own food, but flying, driving and buying less… and might be much happier.”

Visions of Scotland 2050, David Hume Institute (from Herald Scotland, 11/10/2008)
Bibliography

2: www.brainyquote.com/quotes/avlin_toffler_777451
3: http://www.scotlandfutureforum.org/
6: https://www.uber.com/gb/en/elevate
7: https://www NATIONALGEOGRAPHIC.com/adventure/2019/01/building-an-undersea-basecamp-for-ocean-explorers/
9: https://www.investopedia.com/terms/b/blackswan.asp

Megatrends Research Sources
www.fujitsu.com/uk/innovation/megatrends/
consulting.ey.com/upsidedisruption-shaping-megatrends/
www.pwc.co.uk/issues/megatrends.html
Image Credits

All images are credited to VisitScotland unless stated, all rights reserved.

Page 5:  Loch Turret near Crieff. Crieff Succeeds / Damian Shields
Page 6:  Edinburgh Cityscape. VisitScotland / Peter Dibdin
Page 6:  Mountain, VisitScotland / Kenny Lam
Page 7:  Glasgow Science Centre. VisitScotland / Kenny Lam
Page 7:  Seilebost, Luskentyre Sands, Isle of Harris. VisitScotland / Kenny Lam
Page 8:  Perth Concert Hall. VisitScotland / Kenny Lam
Page 8:  Seilebost, Luskentyre Sands, Isle of Harris. VisitScotland / Kenny Lam
Page 9:  Mute Swan, The Deeside Way is near Ballater and Cambus O’ May. VisitScotland / Jakub Iwanicki
Page 10:  Dark skies over Kirroughtree forest. VisitScotland / David N Anderson
Page 11:  Sunset over the River Tay. VisitScotland / Kenny Lam
Page 12:  Clyde Arc, Glasgow. VisitScotland / Kenny Lam
Back Cover:  Glasgow Tower. VisitScotland / Kenny Lam.
CONTACT US

Insight Department
VisitScotland
Ocean Point One
94 Ocean Drive
Edinburgh EH6 6JH

0131 472 2222
research@visitscotland.com

March 2019

Visitscotland.com visitscotland.org

Disclaimer: VisitScotland has published this report in good faith to update stakeholders on its activity. The analysis and presentation of this report was undertaken independently by VisitScotland. All reasonable steps to confirm the information contained in the publication is correct. However, VisitScotland does not warrant or assume any legal liability for the accuracy of any information disclosed and accepts no responsibility for any error or omission.