From Leisure to Pleasure: Societal Trends and Their Impact on Possible Future Scenarios for UK Rural Tourism in 2050

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Abstract

With the relative recent growth of rural tourism, there is a need to understand better both the long-term societal changes along with possible future advances in technology, to ensure that rural destinations are more aware of their consumer's future tourism expectations.

Existing future rural tourism studies tend to focus on the relatively short-term (in terms of future studies timescales) and often assume that the future will be a reflection/extension of today, and lack any understanding of how possible future scenarios options may influence the future development of rural tourism. The objectives of this study are 1: To explore the major social trends that are likely to influence the future of rural tourism in the UK by 2050, and 2: To examine two possible rural development scenarios resulting from such trends.

Through an exploration of both futures and tourism futures literature, a number of issues will be developed over two periods: the near and to some extent the known future scenario (next 10-20 years) and the far future scenario (20-40 years). The debate/discussion about these scenarios is framed within the context of both societal trends and future technology developments and their possible impacts on the rural tourism recreation experience. In terms of the future of rural tourism, there is likely to be a shift from functional leisure activities such as walking/hunting to experience/pleasure focused activities. We may also see the development of segregated/ protected/exclusive rural tourism areas that are only available to elite tourists who can afford to pay for the experience. For the great majority of tourists, driven by land use conflicts, labour and land shortages, they may expect to see an increase in the use of technology to deliver the future rural tourism experience, but this rural experience may be in an urban environment.

Introduction

Since the 1970's the Shell oil company has been the most high profile organisation to use scenario planning to help with its understanding of the future, but its origins can be traced back to its use by the USA military in the 1950's, through the work of the RAND corporation (Schwartz, 1999). The future has always fascinated us, and as Khannia & Khannia (2011) remind us, this area of study is only one hundred years old and started with Marinetti's (1909) pioneering study, but only became a serious topic for academic study with Toffler's 1970 book, 'Future Shock'. Futures studies are not about the projection of one definitive future, but rather about painting a picture of multiple outcomes based around possible alternative models. They are not about forecasting the future, and do not attempt to predict the future based on current trends. Over the past few decades future studies have moved away from single point absolute projections of definitive images of the future, towards the idea of scenario planning which uses complex multiple layers of social and technological drivers of change (Inayatullah, 2002) to develop not only possible, but more important feasible options. At its core future studies thinking is a process that helps to make more informed decisions by exploring options and choices. One developing method to think about the future is using scenario planning, which enables the development of a much broader understanding of the issues. Lindgren & Bandhold (2003) suggest there are four reasons for using scenario planning: 1. It reduces the infinite number of possible futures into a manageable number; 2. It encourages thinking outside known and comfortable parameters; 3. By telling stories and painting pictures it matches the way our brain

works, so expanding our ability to process information; 4. It enables consideration of the unthinkable. They also suggest that for scenarios to be meaningful and helpful, they must not only be plausible, but also challenging by taking you outside your normal thinking framework.

Of note is the recent increase in research into the future of urban tourism facilities (Juergen, 2011; Lyons, 2011; Person, 2011; Warne, 2011). There has however been little research into the feasibility of possible futures scenarios from a rural tourism perspective. In order to understand better a possible future for rural tourism and given the increasing uncertainty and speed of change of many societal trends, two scenarios will be developed: a near future scenario and a far future scenario.

A Short Overview of Rural Tourism in the UK

The management of the countryside and rural areas for recreation purposes in the 17th and 18th century was limited to game conservation for the landed gentry (Towner, 1996) and as place for them to play. Travel at that time was slow and difficult, and where it did exist tended to be between towns, rather than to and from rural areas. However gradually, through such concepts as the 'grand tour', interest in rural tourism began to develop. By the 19th century, this interest was stimulated by the growth of the urban middle classes, and the idealised images generated by Constable's painting, Wordsworth's poetry and Hardy's novels (Roberts & Hall, 2001). This combined with the development of the railways network and their low fares, encouraged the opening of the rural areas in the UK to tourism, as did the opening of Hydros and Spas (Durie, 2006). While the mass of the population had to wait until introduction of the 'Parliamentary train' with their penny a mile train in 1844 (Pimlott, 1947) to access the countryside, this enabled the working people of the new industrial age to visit the countryside and return home in one day – the start of the day trip market? This growing interest for rural tourism was also reflected in the increasing popularity of organisations such as the Youth Hostels Association, Cyclists Touring Club and Holiday Fellowships all with an emphasis on rural tourism or at least making use of the rural environment (Middleton, 2007). This time could also be described as a period of the collectivisation of tourism experiences, and is reflected by activities such as Wakes Weeks, Hop Picking holidays and the first purpose built holiday camps. This development of organised tourism in rural areas was also strengthened by the Holidays with Pay Act in 1938, and during the war with the evacuation of children from cities to the relative safety of rural areas. Although investment in tourism facilities was not a priority in the post-war reconstruction of the UK, the idea of a holiday by the seaside was still popular, and in order to meet this demand new holidays camps began to be developed. The 1930's notion of collective holidays and the enforced collectivisation required by the war, along with the increase in car ownership after the war (Pimlott, 1947), created a desire to get away from other people and lead to a shift towards individualism, and rural tourism was not exempt from this trend. This trend was reinforced by the development of national parks in England, the designation of country parks and the new motorway system. By the 1960's, self-catering accommodation, often in the form of caravan parks located in rural areas, opened the countryside to people who could otherwise not afford to visit. Interest in rural tourism was also encouraged by the growth of school adventure trips to the countryside, and the general growth of activity holidays over the rest of the 20th century. In conclusion, from this short overview of the development of rural tourism in the UK, its growth

was stimulated by societal and technology/transport trends and these two key issues will be explored in terms of the future of rural tourism.

Information on the size and scale of the rural tourism market in the UK is difficult to measure, and as Roberts and Hall (2001) have noted, in many countries it may account for between 10-20% of all tourism activity. However, as there is no official definition of rural tourism, estimates can be unreliable, and this raises the question as to why no such definition exists? From government tourism statistics it can be estimated that just over 22m overnight and 430m day trips were made to villages/countryside in 2011 (tables 1,2,3), accounting for spending of £3,559m by overnight tourists and £11,856m by day visitors. This must be seen as a minimal estimate of trips and spend, as a proportion of the trips classified as seaside and small towns could be counted as rural trips.

Table 1: UK Residents Tourism in the UK by Type of Location and Destination Country

	Trips (millions)				Spend (£ millions)			
	UK	England	Scotland	Wales	UK	England	Scotland	Wales
Seaside	24.11	18.87	1.50	3.26	4,584	3,642	301	545
Large City/ Town	47.31	40.05	5.16	1.34	8,440	6,840	1174	217
Small Town	28.20	22.13	3.62	2.24	4,190	3,032	710	351
Countryside/ village	22.32	17.30	2.67	2.12	3,559	2,646	503	332

Source: UKTS, 2010

Table 2: UK Residents Tourism Day Trips by Type of Location and Destination Country

Volume of Visits	UK	England	Scotland	Wales
Type of Place	(millions)	(millions)	(millions)	(millions)
Large City/Town	671	582	57	32
Small Town	383	319	38	25
Rural	400	333	34	32
- *Village*	210	178	16	16
- *Countryside*	220	180	21	19
Seaside/coast	147	111	14	21
- *Seaside resort or town*	100	77	9	15
- *Beach*	53	39	6	8
- *Other seaside*	15	12	2	1
Total	1,545	1,307	134	102

Source: GB Day Visits Survey, 2011 Summary

Table 3: UK Residents Tourism Day Trips by Type of Location and Destination Country

Value of Visits	UK	England	Scotland	Wales
Type of Place	(£ millions)	(£ millions)	(£ millions)	(£ millions)
Large City/Town	26,863	22,891	2,754	1,186
Small Town	13,212	10,942	1,598	657
Rural	11,856	9,434	1,525	895
- *Village*	5,689	4,267	907	515
- *Countryside*	7,208	5,879	813	514
Seaside/coast	7,591	5,495	1,327	541
- *Seaside resort or town*	5,435	3,659	1,149	422
- *Beach*	2,998	2,049	604	146
- *Other seaside*	355	309	26	20
Total	£53,819	£44,449	£6,152	£2,939

Source: GB Day Visits Survey, 2011 Summary

There has also been an ongoing debate about the relative balance and benefits between overnight tourists and day visitors to rural areas. However, such debates misses the point, as survey data measures the past and provides little indication about the future direction of rural tourism, and the fundamental drivers that impact its development. For answers to such questions, we must look to futures thinking, and in particular to scenario planning.

Central Themes of Societal Change

Yeoman (2012) has suggested there are three main themes that drive societal change, and these can be grouped around wealth, technology and resources.

Wealth:

1. By 2020 China will overtake the USA as the world's economic power, but by 2050 India will be the worlds largest economy (CNN, 2012)
2. By 2050 there will be 4.7 billion international tourists, 1 in 2 of the world's population will be an international tourist (UNWTO, 2011), and there will be a corresponding increase in information about tourism.
3. By 2050 there will be more retired people in the UK, than those working (ONS, 2011)

4. By 2050 responsibility for pensions will have shifted from organisations and companies, to individuals (Hay, 2012)

Technology:

1. As a counter to the mass tourism product, technology will enable the development of a more personalised rural tourism experience
2. Technology and artificial intelligence will be dispersed throughout the rural tourism experience
3. Rural tourism accommodation will develop into a mobile office/home, as tourist will want to be continuously on-line
4. Robotic services will be the norm, driven by labour shortages

Resources:

1. Climate change, rising seas levels, increased urbanization
2. Eco tourism will become an elite experience for the mega rich
3. Controlled mass tourism for the middle classes will be limited to the urban environment
4. Real food and cultural history experiences will be a luxury, only available to the wealthy, with urban farmer markets the main means by which urbanites connect to the countryside

So how are these drivers of change impacted by the long-term societal trends?

Key Trend 1: Climate Change and Environmental Concerns

Figure 1: Climate Change Projections
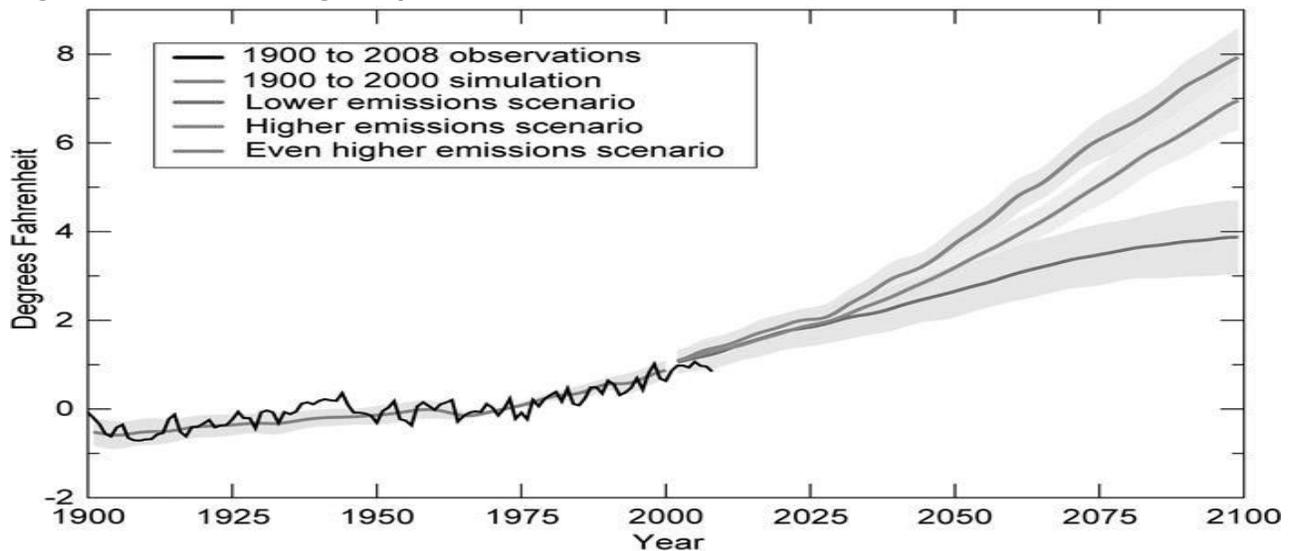
Source: USGCRP (2009). Note: Changes are relative to the 1960-1979 average.

Figure 1 shows the observed and projected changes in global average temperature under three no-policy change emissions scenarios, and suggest possible increases from 2 to 11.5°F. Even with such temperature increases, it is unlikely rural tourism will disappear, but it will change and

5

new forms of rural tourism may develop. For example, there may be an increase in travel with new eco-ethical conscience bus and trains companies, and the development of new eco-friendly rural hotels. There may also be more importance placed on the development of social capital, generated by a demand for "authentic" rural holiday experiences. In the future, creating social capital from a rural tourism trip may become important, as your friends and peer groups will let you know whether you are an eco-friendly fun-seeker rural tourist or not. Experiences such as attending traditional rural events and getting to know the locals, will become important in developing social capital and current forms of eco-ethical travel (staycation, glamping, authentic holiday experiences, etc.,) may become mainstreamed? It might only be a matter of time before all rural transport providers, travel agencies and hotels develop a strong environmental policy as part of their standard rural tourism packages. In the future eco-claims and credentials may also be an essential entry threshold requirement for providers of the rural tourism experience.

There can be little doubt that the long-term impact of much of the recent political agitation about the environment will pressurise tourists into being aware of the eco costs they are incurring. Tourists can no longer say they are not aware of their ecological impact, as measurement systems have become more personalised and automated; it is now possible to know the precise impact of flying to Sydney or spending two weeks with the family in rural Britain. In the future, it is even possible that each person will have their own carbon trading limits, and will have to make difficult holiday choices. One result of which may be the creation of a holiday personal carbon trading market, with wealthy holiday tourists buying carbon credits from the holiday poor tourists?

Overtime there may also be a change as to the meaning of luxury in rural tourism. Today no one boasts about guzzling resources or wasting energy. In the future, luxury may become an idea that becomes synonymous with simplicity and moderation. Hedonistic rural tourism holidays will still exist in the future, but may be viewed negatively as a cultural threat to society.

Key Trend 2: The Growth of World Tourism

In the 20th century the growth of international tourism, has been one of the greatest economic drivers as well as a dynamic social phenomena. In 1960, it accounted for 70m tourists and by 2012, it is expected to exceed 1,000m, some 12% of consumer spending and 1 in 12 of all jobs in the world (UNWTO, 2012). In the past few decades, there have been a number of shocks such as terrorist attacks and health scares, but these shocks have not structurally changed the growth projections in tourism. In the future, there is no doubt that international tourism has and will continue to grow (figure 2). However, what has changed and will change even more in the near future is that much of this growth will come from the emerging, and not the advanced economies. This is not to say that tourism in the advanced economies will decline, but it will grow at a slower rate compared to tourism in the emerging countries. Does this mean we can expect fewer rural tourists in the UK? Probably no, as international tourists only account for about 10% of all UK tourists, the vast majority rural tourists have and will continue to be from within the UK.

Figure 2: Actual & Projected Growth of International Tourism Arrivals (millions)
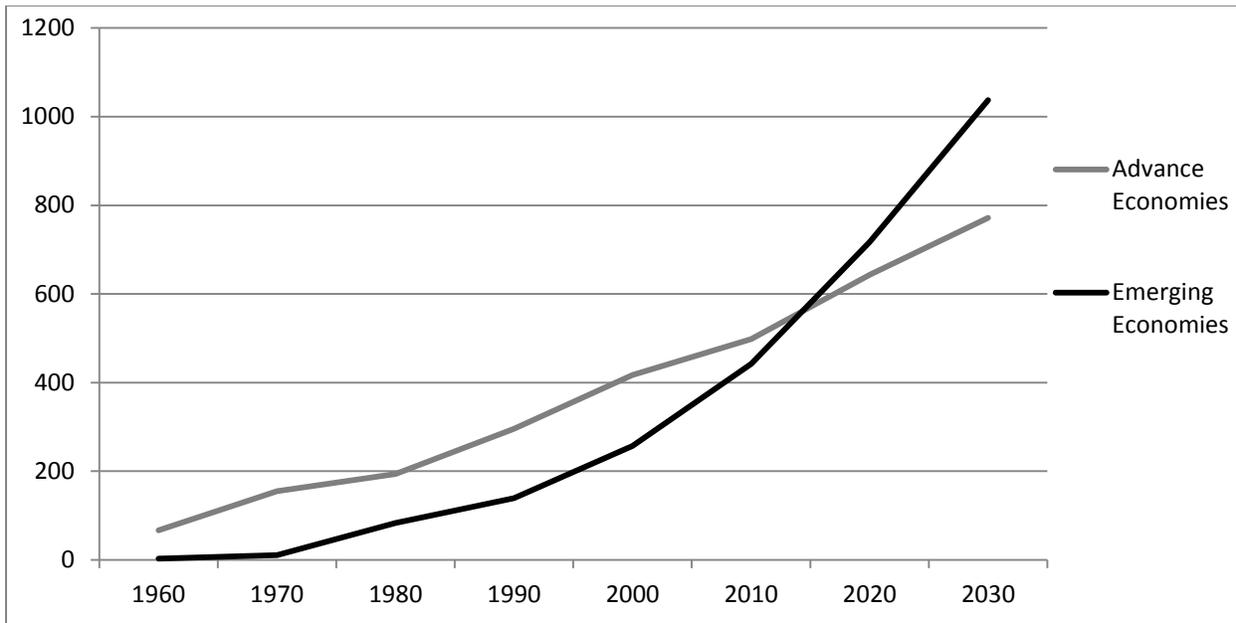
Source: Towards Tourism 2030, UNWTO 2011

Key Trend 3: The Price of Food & Oil

There are not many certainties when examining future trends, but one certainty is the limited quantity of oil, and it is becoming more costly to extract. All the indicators suggest that the price of oil will increase in the future, and that the years of cheap oil are long past. Although it is difficult to provide a long-term forecast for the price of oil, its price does directly influence the cost of travel to rural areas and the willingness of tourists to travel around rural areas. Tourists will still travel to rural areas, but in the future they maybe less willing to travel around the area. One consequent of the increasing price of oil is the popularity of fuel surcharges by airlines and now in the USA, on hotel prices. There is to reason expect rural tourism to be immune from such fuel surcharges. Perhaps in the future we may see the imposition of a rural tourism fuel surcharge for non-residents to discourage unnecessary travel.

Food and fuel price inflation (figure 3) may also potentially contribute to societal and international instability; for example, food price rises were a contributory economic factor driving dissent during the "Arab Spring/Summer" in 2011 and it is likely that conflicts over food resources will become more prominent in future. At both an international and local level, it is likely that there will be further regulatory intervention to limit fossil fuel emissions as well as consumer behaviours that contribute to climate change. New methods of extracting oil such as fracking of oil shale and the growth of crops for bio-fuels will have an impact on countryside landscapes and could lead to access restrictions.

7

Figure 3: World Food and Oil Price Indices to 2030 (2005=100)

Source: Oxford Economics
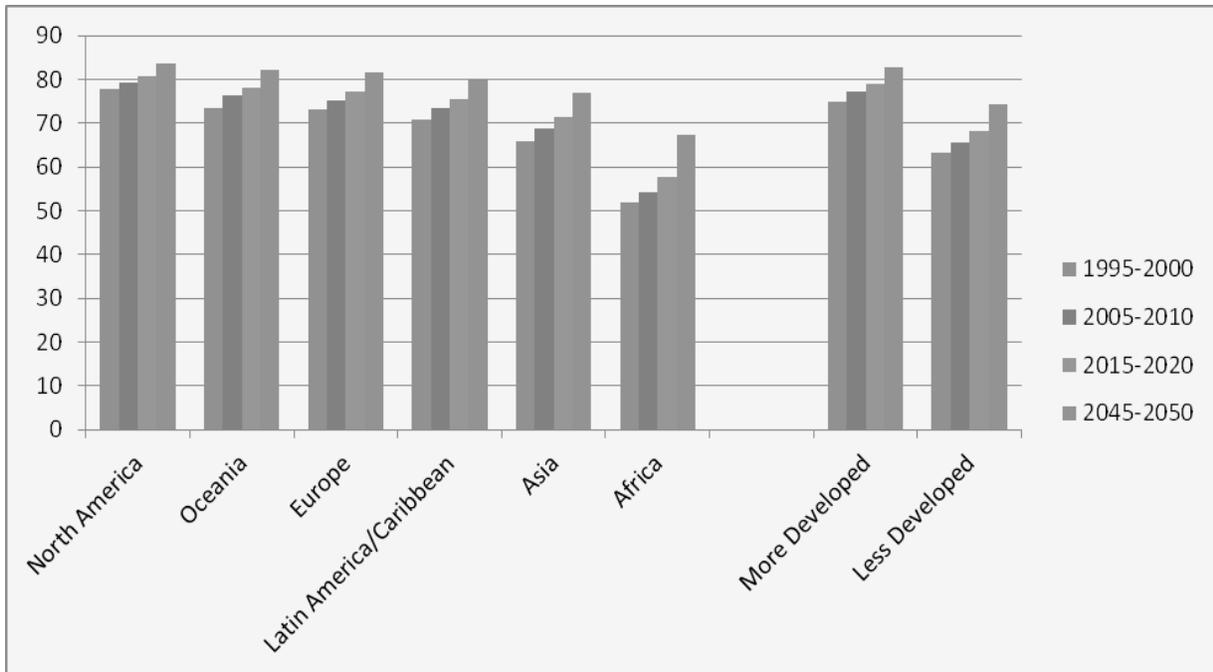
Key Trend 4: Changing World Population

Since 1970, the world population has been getting older, with the percentage of those under 24 projected to decline from a high of 57% in 1970, to 41% in 2030 and over the same period the 55+ age group is expected to grow from 12% to 25% (figure 4). Such major structural changes will have a profound impact on the quality of life and the tourism behaviours of these people. This trend is also reflected in life expectancy (figure 5) where although life expectancy in the developed world will increase, albeit slowly, while in the less developed parts of the world there is expected to real increases in life expectancy. These two trends are also likely to be associated with a much more educated population (figure 6). Together these three world trends suggest that rural tourism providers will need to think about the products and services they offer in the future. Possible developments include adapting products and services for the elderly, labour shortages of entry-level staff, and better-educated and knowledgeable tourists.

Figure 4: The World Population by Age Groups
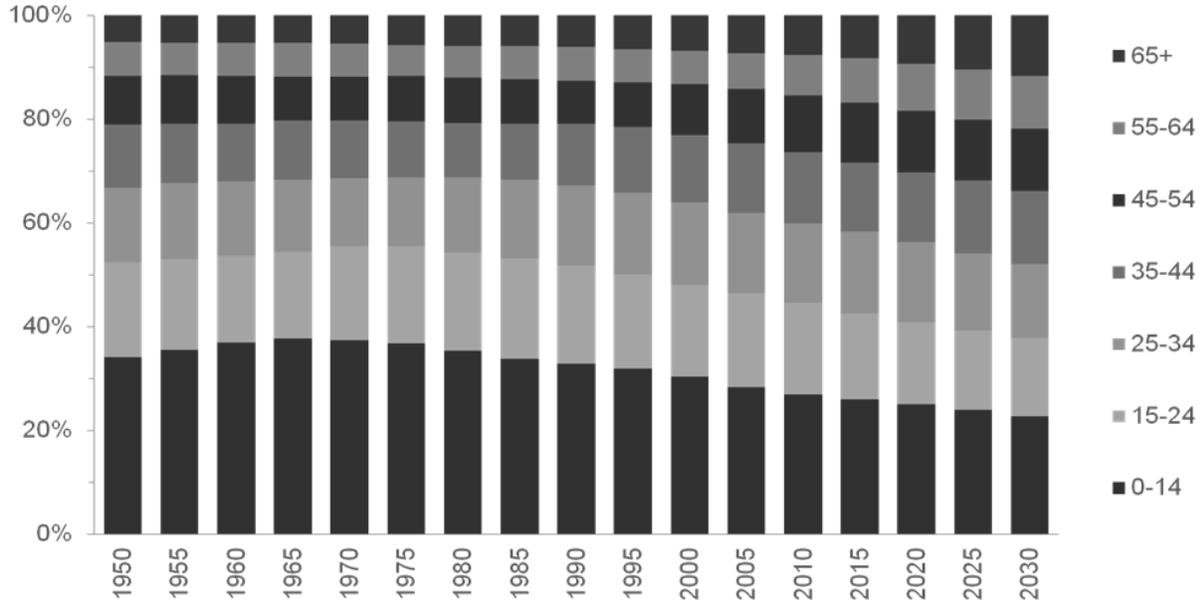
Source: Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat, World Population Prospects: The 2008 Revision

Figure 5: Life Expectancy by World Regions

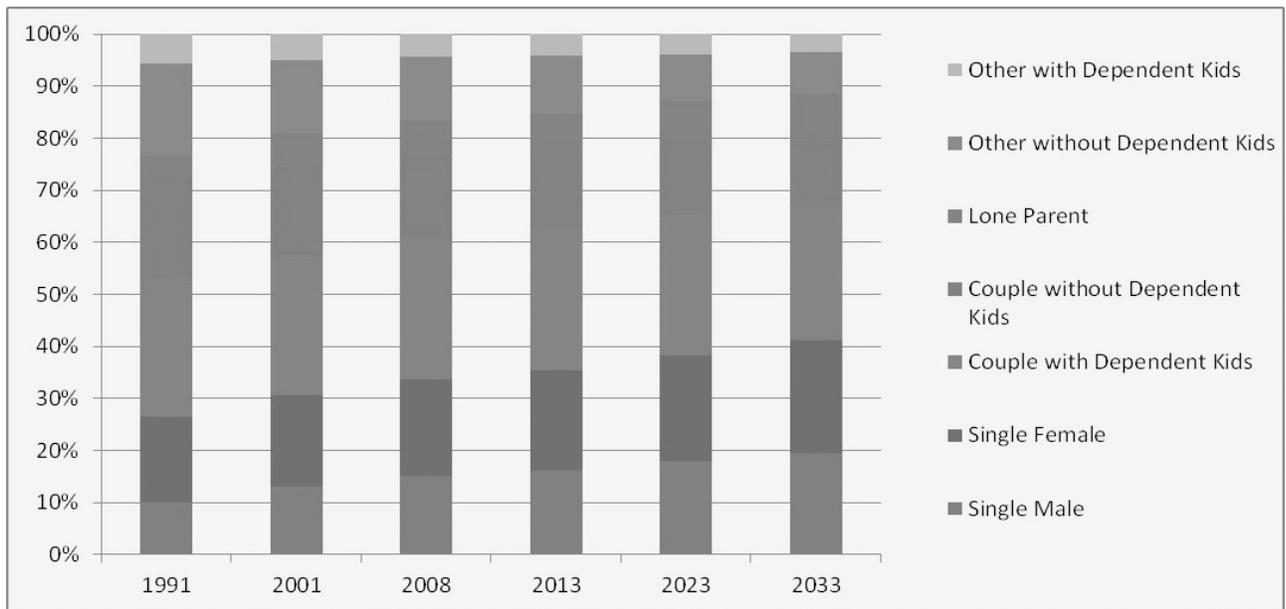Source: United Nations Population Projections

Figure 6: Percentage of Selected Countries/Regions Population with at Least Secondary Education
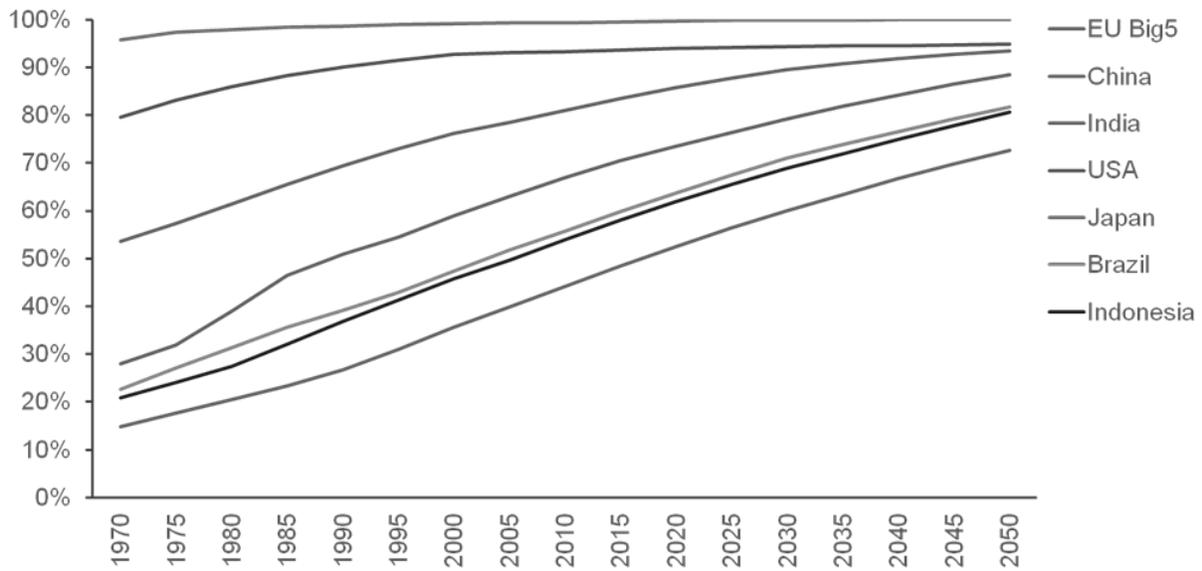
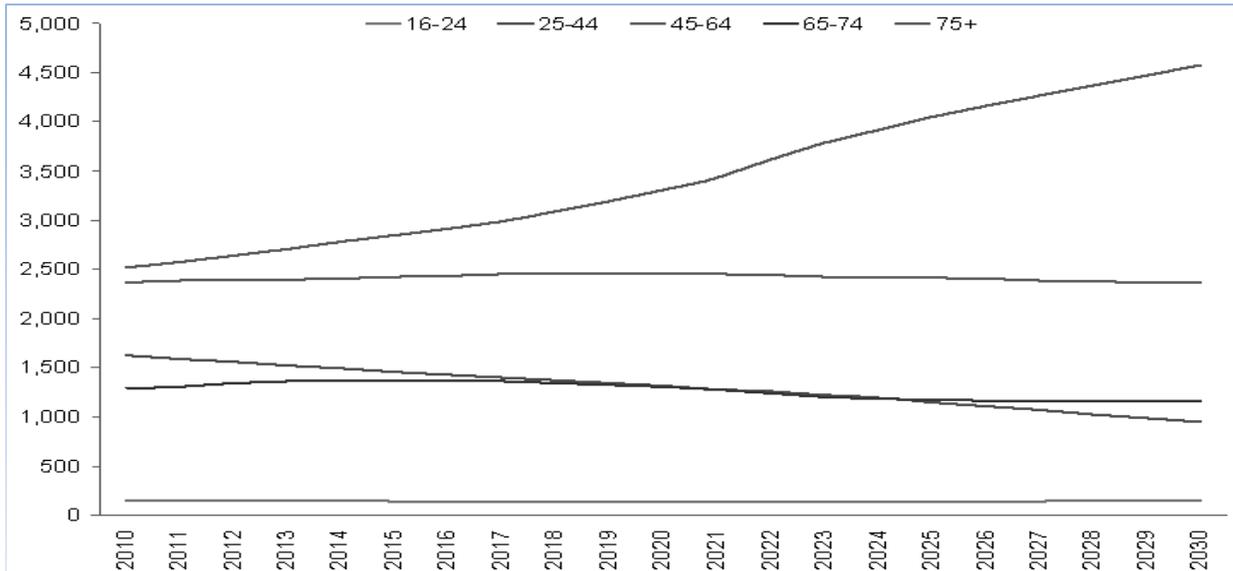

Source: World Population Program/ nVision

Key Trend 5: Changing UK Population

Figure 7: Composition of Household Types as a Proportion of all UK Households

Source: ONS, NVision

Figure 8: Projected Rise of Single Person Households in the UK ('000)

Source: ONS, nVision Forecast, 2011

In the UK, we can expect to see a rise in the proportion of single person households, a decrease in the traditional family households with kids, but an increase in lone parents (figure 7). By 2030 over 50% of the UK households will have no kids living in the household. It is increasingly becoming a truism that age does not dictate either expectations or behaviours to the extent that might have been the case in the past. Figure 8 shows there will be a real increase in the number of elderly people living in single households in the UK, in particular the number of singletons aged 75+ will grow from 2.5m in 2011 to a projected 4.5m by 2021, with more of these singletons, women than men. The reason for this growth is due to factors such as bereavement, divorce and more elderly continuing to live independently as they will remain healthier than in the past. Conversely, the number of young singletons (those aged 16-44) although still substantial, is unlikely to increase in absolute numbers. Young singletons will remain a significant minority of the British population, and driving this has been an increase at the ages at which Britons are choosing to marry and/or have children. Young singletons are also faced with serious first-time household formation costs and this may well push singletons to look for economies of scale, with an increase in house-shares/co-habiting to spread the rental costs?

Singletons accounted for around a quarter all of households in England at the start of the 1990s; by 2010 the figure was approaching 40%. Most single householders fall into one of the three categories: single young professionals who can afford their own place, the divorced middle-aged and finally elderly people who tend to be on a tight budget, although this model may change in the future (Evandrou, et al., 2001). However, this growth in singletons is not all-good news for rural tourism, it may create problems for suppliers who may not like the disrupted economies of scale that single people can bring. They may want smaller portions, smaller hotel rooms, a table in a restaurant (with an unoccupied seat), a hotel transfer just for one, and a glass of wine but not a full bottle. As their numbers increase and the singleton spend rises, rural tourism providers in the future will have to adjust their products to fit this developing market.

As well as an increase in singletons, we are also likely to see changes in the structure of the UK population (figure 9, table 4) with over the period 1950 to 2050 the number of people under 29 decreasing from 42% to 32%, while the over 60's increasing from 16% to 30% over the same period.

Figure 9: Percentage of UK Population by Age Group
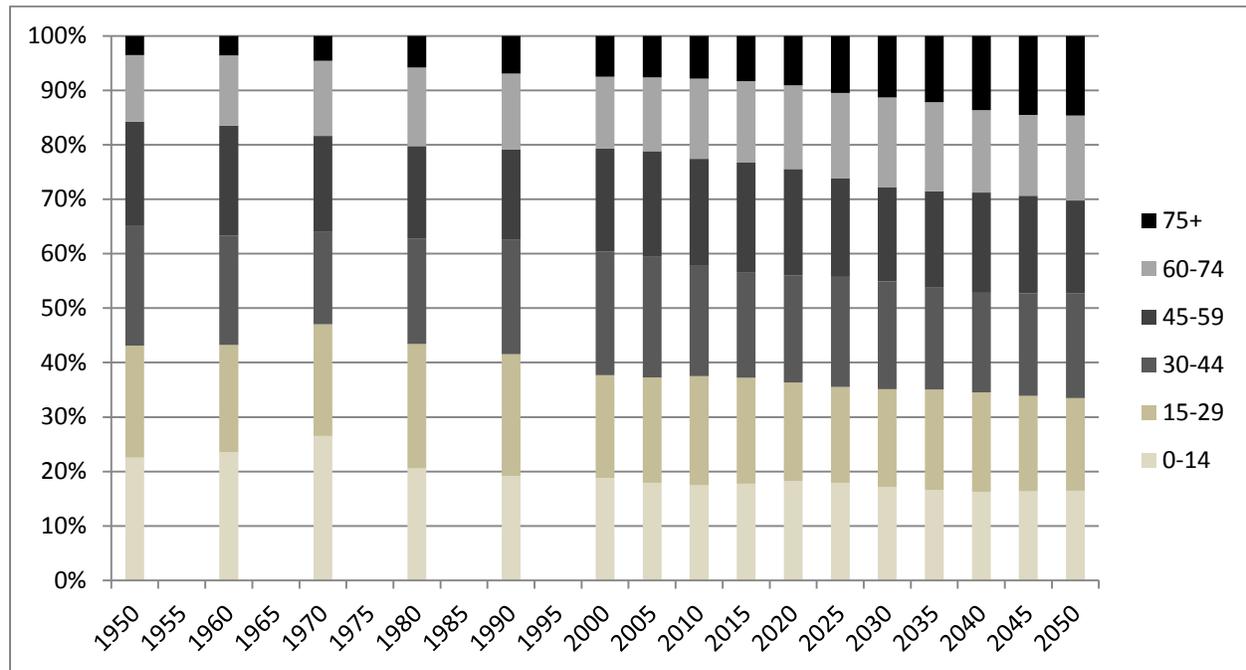
Source: ONS Annual Abstract of Statistics, Volume 145: 2009 Edition, Population Trends

Table 4: UK Population by Age Category ('000)

	Age Category			
	0-14	15-60	60+	Total UK Population
1950	11,325 (23%)	31,012 (62%)	7,910 (16%)	50,247
2000	11,107 (19%)	35,750 (60%)	12,257(21%)	59,114
2030	12,279 (17%)	39,255 (55%)	19,858 (28%)	71,392
2050	12,959 (16%)	42,005 (53%)	23,785 (30%)	78,749

 Source: ONS Annual Abstract of Statistics, Population Trends

Although the UK population is increasing in absolute terms (table 4), like the world population, its structure is changing, and in particular, it is aging. As table 4 suggests, the percent of people over 60 already outnumbers the young. A person born today in the UK has a 30% chance of living to the age of 100! (ONS, 2011) These population changes will have profound implications for the development of rural tourism, particularly in the provision of staffing. As the young occupy many of the frontline tourism jobs, and it is possible that in the future because of labour shortages, they will be replaced by service robots.

Key Trend 6: The Urbanisation of Rural Tourism Activities

Table 5: Urban & Rural Population of England

	2009 Population	**% Population**	**% of Land Area**
Urban	42,185,000	81.4	21.0
Rural	9,625,000	18.6	79.0

 Source: 2010/11 Regional Trends, 43

There is a basic assumption that rural tourism has to take place within a rural environment, usually the countryside, but in the future, this may not be correct. As table 5 shows, most of us live in urban areas, and this is increasingly where we expect our recreation experiences to be located, and already we are seeing the development of traditional rural recreation activities in urban areas. For example, indoor rock climbing in Edinburgh, kayaking in the Lea Valley White Water Centre, Olympic synthetic mountain biking courses in Essex, indoor surfing in Bedfordshire and even indoor skydiving in Manchester. In the UK, we now have over 2,000 indoor climbing walls, in 1970 there were none? However, it could be argued, that while you may experience the physical activity, you do not experience the excitement of the activity in a strange environment, what you experience instead is a sanitised version of the activity. Most of the UK population were born and live in urban areas, and for most of the population rural areas are a strange and unknown place, but we may still want to experience it, perhaps through virtual tourism.

**Key Trend 7: New Technology and the Rural Tourism Experience**

In the near future, rural tourism services and activities will become much smarter, with technology embedded in almost everything we do. In particular, real-time services will continue to develop as we seek to develop a more pro-active form of participation with our online friends. Concerns about the lack of privacy will soon experience a generational shift, as those born in the age of the internet (post 2000) move through their various life stages. This generation will always be 'switched on' and will not tolerate any type of delay in updating their status. It is expected there will be further development of apps that allow the uploading of videos to social networks, while they are still being recorded, so that friends can see your activities in real time. While it will be important for some people to be able to 'switch off' during their rural tourism experience, it is likely that many more will want to update continually their social CV. This will only grow, as more tourists will use their rural tourism experiences to earn instant social status with their friends.

The rural tourism experience may also develop as a place for 'showing off' and in the future this may lead to a 'theatrification' of rural adventure places, which will make the rural tourism visit a more fun/social experience. The rural tourism experience could also provide through the use of blogs and networks, places to share details of potentially status-enhancing rural tourism activities. Just as in last decade, museums have become cafes with some interesting historical displays, so it maybe with rural tourism recreation sites. Once you went to the countryside to experience nature in the raw, as a place to walk, paddle, climb or cycle but now they are places where you recreate (Beames, 2012) where along with the rural tourism experience, you can order a cappuccino!

We also know that Google is already developing 'augmented reality glasses' (Walter, 2012) that enables you to walk around with a computer screen always before your eyes which presents adverts that are relevant to your interests. It will not be long before, while you are walking to work in a city, the image you see will be a country lane in England or a hill in Wales, the countryside (or at least the virtual countryside) will come to the city. This may be supplemented by displaying real walks that you had previously recorded, so that they can be replayed into your eyes as you walk to work!

Key Trend 8: Cross Generation Transfer of Wealth

Figure 10: UK Personal Disposable Houshold Income (2011 prices)
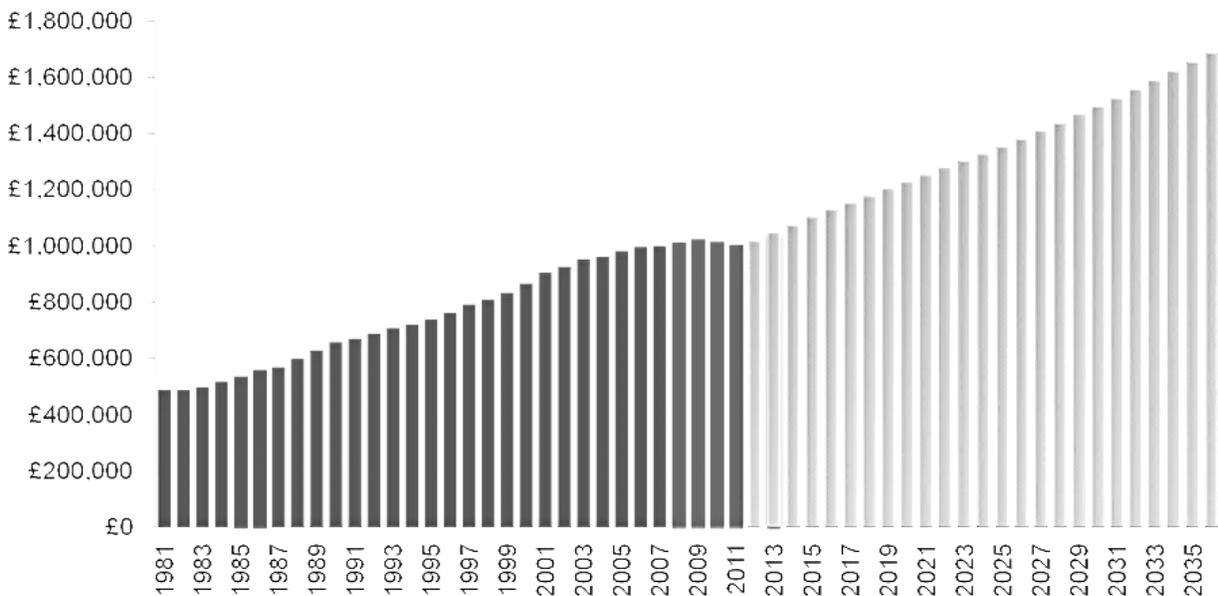
Source: Oxford Economics

The spreading of wealth across generations is now common in modern day capitialism, and much of this wealth transfer has been driven by the increasing value of housing. As shown in figure 10, despite a slowing down of growth in the last few years, after the current recession, this growth in wealth is expected to continue. Within the UK, the average houshold now has a disposible income of around £900k (figure 10), a doubling in real terms in the last 30 years. As wealth is a key driver of tourism, therefore as the level of household wealth increases, we can expect tourism as well as rural tourism to increase.

In the past two decades, the world's economic output has almost doubled and is projected to double again in the next twenty years (figure 11). Whilst non-OECD countries accounted for a quarter of world GDP at the beginning of the 10s decade, they may account for more than 40% by 2030. This suggests that we must look for growth for rural tourism from countries ouside our existing markets.

Figure 11: World Economic Output (Real World GDP, in billions $US)
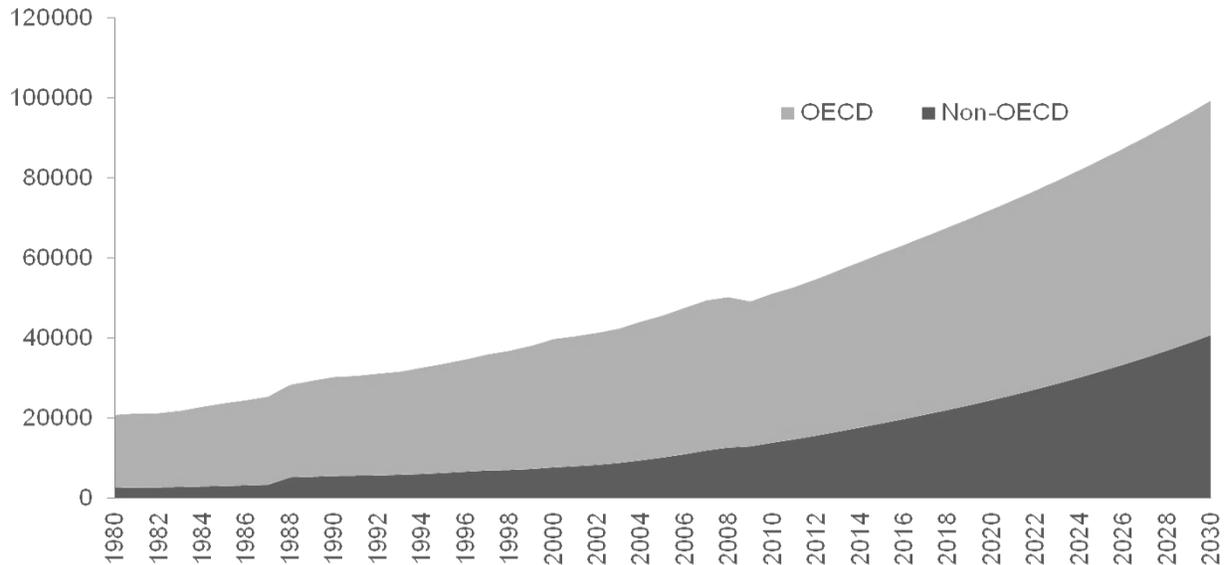
Source: Oxford Economics

Key Trend 9: The Fear of the Unknown

In a sense, at the heart of rural tourism is a search for the unknown and maybe the desire to seek out dangerous experiences. For many tourists, the gradual de-mystification of rural tourism is a cause for celebration, as they try to minimise their chances of being 'ripped off', with fewer nasty surprises. They are also much more likley to use blogs and social media sites when they plan new activites or stay in new places, as countless others have been before and you want to make use of their insights. This complements an emerging social trend of maximising behaviour which also encourages a more cautious approach to consumption which prioritises careful pre-purchase research, to minimise the risk of over paying and purchasing something that fails to meet your expectations. When rural tourists have the best possible information, they are almost actively avoiding unnecessary adventure, and for some the act of researching a holiday has become a way of minimising risk and elimating fear of the unknown.

As the future develops, can we expect consumers' parallel interests in both meticulous pre-planned consumption and the desire for novel, authentic experiences to be reconciled? One energing solution is the concept of 'managed discovery', a future in which tourists place a premium on moments of surprising and fresh experience (be it exposure to new tastes, destinations or activities) by bringing order and discipline to the process of discovery. One potential manifestation of this new mindset could see responsibility for exposure to the previously unknown, and subsequently the related risk, being outsourced to third party (but nonetheless trusted) partners with explicit authorisation to surprise and enlighten rural tourists with un-researched and un-tested offers?

Over the last decade there has been a dramatic step change in the spread of technology, and in particular in connectivity, which means we are always in constant communication with our

friends. However, for today's Facebook generation this has created another form of fear, the fear of missing out (FOMO). As tourists seek to maximise their leisure time, and try to ensure that all social activities are selected with care so that no opportunity is overlooked to undertake better or more cutting-edge rural tourism experiences. This FOMO can stimulate feelings of anxiety which compel individuals to both prove that their chosen activity is the best one possible (as evidenced through regular updates, tweets and photos) and that the selected pursuits are based mainly or solely on those venues/happenings which appear to be generating the most responses within their network of friends, and perhaps altering intentions if real-time reviews posted by others indicate the existence of a superior alternative. In the process, such rural tourism multi-tasking may negatively impact the tourists ability to actually enjoy their activities and 'switch off' from their networks.

The Near (2020-2030) and Far Future (2030-2050) Scenarios

Thinking back 20 years to the 1990's, how much the world has changed in this decade alone. The 1990's saw major growth UK trips abroad from 31m to 54m, the deregulation of flights within the EU and the subsquent growth of budget airlines and budget hotels, the expansion of flights from UK regional airports, from 47m passengers to 95m passengers, the opening of Channel Tunnel, with passengers increasing from 3.7m to 9.1m. So what can we expect rural tourism in the UK to look like under two different scenarios?

Possible Future Scenarios for UK Rural Tourism

Key Driver	Trend	Rural Tourism in 2020-2030	Rural Tourism in 2030-2050
Climate Change & Environmental Concerns	Visitors are becoming much more aware of their impact on the environment and the full costs of their trip	Star ratings for rural tourism trips, based on full environmental impact of trips will be the norm	
		Tourism taxes will be imposed not only financial costs, but on the full environmental costs	Privatisation of National Parks and the growth in development of private, paid for access rights to rural areas
	Romantic image of rural tourism, saving the past for the future	Development of permanent 'rural tourism theatrical zones' in urban areas to showcase the UK countryside	Trips to rural areas by urbanites maybe subject to permit restrictions and controls
		Urban farmers markets will be the main means that middle classes	Access to real food and rural tourism experiences may be a

16

		connect with the countryside	luxury only for the urban wealthy. A reverting back to the 17th and 18th century leisure users of rural areas?
	Carbon 'off setting' is now the norm by travel companies	Development of carbon 'off-setting' schemes, that allows you to take a rural tourism holiday without feeling guilty	Development of holiday carbon trading schemes from holiday rich/time poor to holiday poor/time rich people
		The right to roam no longer seen as right, but as a privilege	Restrictions on the right to roam for tourism purposes imposed by government
			Cap on the number of days people are allowed to visit rural areas – development of a new market selling such rights
			Eco tourism will be come an elite experience only for the rich
Growth of Tourism		Political pressure groups (NT, CPRE, RSPB, FOE) may force an increase in the number and extent of protected rural areas	Development of 'tourist free days in rural areas' to prevent Disneyfaction of rural villages
		Destinations may try to restrict access to rural tourism products, from those outside the country, unless they pay the full costs.	World Trade Organisation may develop into a World Services Organisation, whose purpose will be remove restrictions on services/experiences, including access to rural tourism areas
			Development of an International Tourism Rural Access Commission (ITRAC)

			to control excessive restrictive practices?
	Commodification and standardisation of experiences	Development of a standardised 'Bucket List' of rural tourism experiences	
Price of Food & Oil	Price of both will only increase	Shorter trips to rural areas	Limits on fuel available to non rural residents for rural trips
			Restrictions on food availability to non rural residents when on holiday to the countryside
Changing World & UK Population	As the baby boomers retire, the overall amount of leisure time for the UK population increases substantially	Demand for active rural tourism will increase	With the development of less intrusive technology such as biometrics, all new born babies will be 'chipped and pinned' to monitor their future recreation activities
	People are living longer and retirement is increasingly seen as a short lived 20th century phenomena		People expect to work all their life, increase demand for rural tourism as people are living longer
	Increase in time pressures as more demands are made on individuals	More demand for shorter but experience intensive trips, so increase in day trips and one night weekend trips	Development of rural retirement villages
	Decline in number of young people, the traditional source of rural tourism labour		Development of robotic services for service tasks
	Rise of the political astute		Restrictions on rural tourism in the UK, may force many to look to overseas
	Rise of the single person households	Need for new rural tourism products tailored to their needs	Growing need to connect people to prevent social isolation
Urbanisation of Rural Tourism	Rural activities will be located close to home		Artificial/virtual experiences the norm

	Population shifts and movements of people, goods and services	Less loyalty to destinations, rural tourism will be seen more as about seeking new experiences rather than physical activities	Shift from rural tourism functional activities (walking/hunting) to experience/pleasure focused activities
New Technology and the Rural Tourism Experience	Technology increasingly embedded in everything we do, see and experience	Consumer controlled and managed content, continuous live Facebook/Twitter/ images updates	
		Development of time restricted access passes to rural areas maybe the norm	Annual allocation of 'rural tourism hours/days'
			Virtual tourism will be accepted as the norm
			Holographic projections common, with for example projections of wild areas in you garden
	Google is already testing driverless cars on public highways		Driverless cars following fixed routes to the countryside
Cross Generation Transfer of Wealth	The baby boomers will be large in number and have the time and resources to demand the services they want	If UK cannot meet consumer expectations, they will look to other destinations	
	Development of the 'user pays' concept is already becoming the norm for acces to public services		Paid for rural tourism recreation pass to access the countryside, to both control access and help fund preservation activities
	No more money, the baby boomers have spent it all	Compulsory rural tourism charge to help protect the country, payable by all users	Decrease in rural subsidies, to encourage rural people to move to urban areas
Fear of the Unknown	The countryside is an unknown and strange place to most people	Look for adventure rural tourism trips with controlled and managed risks	

	Post 9/11 world is much more aware of strangers	Group travel is the norm, booked through specialised and government authorised agencies	For safety reasons the young are banned from the countryside, no more school adventure or scout trips
	There may be a need to prove you are capable of coping with new and perhaps strange experiences	Government controlled permits/educational qualifications are required for access to the rural tourism activities	
	Consumers will increasingly seek approval of their peers and may want to display their values and tastes for others to see	Going on a rural tourism holiday is seen as a means of raising your self-esteem	
	Increase awareness of the breakdown in rural society	Upsurge in rural based societies and organisations as urbanites are seen as the new defenders of the countryside	The end of unrestricted access to the countryside. Protected rural areas only accessible by the very rich

Conclusions

Revisiting the three themes that drive societal change as suggested by Yeoman (2012) wealth, technology and resources, what do they mean for rural tourism.

Wealth:

1. We will become overwhelmed with information and options about travel planning, and this could led to a shift towards the simpler life.

2. We will expect better experiences, faster service, multiple choices along but these will be associated with social responsibility and greater satisfaction of the rural tourism experience.

3. There will be a growth in the 'selfish tourist' as we all look for something unique, something just for me?

Technology:

1. In order to survive, rural tourism will need to be more driven by technology, and this will become the norm

2.   More technology could mean less human contact with those who live and work in the countryside

3.   The new rural B&B will not be Bed & Breakfast, but more likely to be Bed & Broadband

Resources:

1.   As we move from country based carbon credits to industry based carbon credits, by 2050 we may well see the allocation of personal carbon credits, meaning that you will have to chose between a long-haul air overseas holidays or more frequent trips in the UK to rural areas making use of public transport?

2   New direct urban transport links and climate change will lead to development of direct 'Go from - Go to' urban destinations, to the determent of rural tourism?

3.   Pressure on rural land to be more productive to feed the growing world population and as more land is set aside for bio-fuels and fracking of oil shale, will result is less land for rural tourism? The right to roam will no longer exist, and if it does exist, access will not be free?

4.   Price will be used to control access to the countryside, and will act as a conservation measure to preserve rural heritage sites, which only the rich can aford to visit.

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