THE THOMSON FUTURE HOLIDAY FORUM

A future-gazing study of how holidays are set to change over the next 20 years
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As market leader, Thomson is continually looking to how it can improve its offering and remain relevant and appealing to holidaymakers.

The Future Holiday Forum was held as part of Thomson’s commitment to understanding and identifying consumers’ changing needs and expectations so that the company can continue to shape its travel and holiday development accordingly. It was an open-ended, ‘blue sky’ exercise giving a panel of experts in such diverse areas as social demographics and hotel architecture free rein to explore a wide variety of themes and issues that may impact on holidays of the future.

The results highlight the wide range of issues that the travel industry will have to cater for over the next twenty years as well as the sort of exciting innovations that will help to create the increasingly individualised holidays that we will all be enjoying by the year 2024.

The results underline the fact that the travel industry needs to continually evolve to provide people with the types of holidays that fit their lifestyles. The output will help Thomson in its quest to be the authority on the past, present and future of holiday travel.

Hugh Edwards
Marketing Director, TUI UK
The Forum Delegates

The following experts took part in the Forum. Each delegate was challenged to discuss how their specialist area will change and develop and how it will impact on the travel industry and consequently the holidays that people will be looking forward to in twenty years time.

Russell Amerasekera, travel broadcaster: Chair
Russell Amerasekera is currently anchor presenter on BBC1’s new prime time travel series ‘Perfect Holiday’ and presenter on the BBC Holiday programme 2003/2004.

Hugh Edwards, TUI UK: Future destinations
Hugh Edwards is Marketing Director of TUI UK which includes market leading brands Thomson and Lunn Poly. His presentation focussed on the destinations we will travel to in 20 years and the kind of things to expect when we get there.

Frank Shaw, The Centre for Future Studies: Social trends of the future
Frank is the Director General of the Centre for Future Studies, an independent think tank formed to stimulate research into the futures facing business and society. Frank’s presentation examined future societal trends and demographic shifts, and how these will impact on holidays.

Ken Hutt & Nadi Jahangiri, M3 Architects: The hotel of the future
Ken and Nadi have worked together on a number of projects including the Millennium Tower in London and Great Court at the British Museum. They presented a concept for how the hotel of the future might look.

Justin Frances, Travel Foundation: Sustainable Tourism
Justin is the co-founder and CEO of www.responsibletravel.com and is a trustee of the UK Government and Tourism Industry’s Foundation for Sustainable Tourism. He was formerly Head of Worldwide Marketing at The Body Shop. His presentation considered how sustainable tourism issues will affect the way we holiday in the future.

Iain McIntosh, travel health journalist and medical practitioner: Travel Health
Iain is a medical practitioner and lecturer on Travel Medicine and Health Studies at the Universities of Stirling and Glasgow. He is also the editor of the Journal of the British Travel Health Association and associate editor of the Journal of Travel Medicine. His presentation examined likely future health trends and their impact on holidays.

Graham Whitehead, BT Exact: Travel technology
Graham is one of BT’s principal consultants for the future of telecomms and IT. His presentation examined how developments in technology will change our lifestyles and thus the way we will book holidays as well as the holidaying experience itself.
Holidays of the Future/Future Destinations

PREDICTED TRENDS FOR FUTURE HOLIDAYS

- More affordable long-haul holidays. A long weekend in New York for £50 or a week in Australia for £99
- Cruise ships become floating entertainment centres (‘Center Parcs at sea’) as cruising becomes even more affordable
- Mobile-free beaches
- Qatar becomes the new Canaries; Ljubljana the new Prague; Slovakia the new New Zealand; and Brazil the next huge mass market destination.
- The Silk Road and China. Where backpackers first venture, mainstream tourists follow

We’re all going on a (long-haul) summer holiday…

The world is getting smaller so there will be no limits to the holiday options available in 20 years time. It will also be possible to go further and faster with the development of the Cosmoplane – a new generation successor to Concorde by 2024. The prediction is that people will be jetting off for a weekend in New York for £50 or a week in Australia for £99.

There is already a boom in four-day short breaks – these types of holiday are showing a 10% annual growth – which will continue to expand. Extended weekend breaks to long-haul destinations such as Rio, Moscow and Cape Town will become the norm. No frills air travel will no longer be confined to short-haul, making destinations such as the Middle East and South America cheaper and more accessible.

Cruises for everyone

The number of people from the UK taking cruises could triple from a record one million in 2003 to more than three million in 2024. Cruising will more frequently be considered as a holiday option by young people in their teens, 20s and 30s.

Cruise ships will become floating entertainment centres of the future featuring sports areas, theme parks, IMAX cinemas, virtual reality games and concert halls. In fact, everything that people enjoy doing as part of everyday life, regardless of the scale, will be found on board.

Family-themed cruise ships will be like Center Parcs afloat, with landscaped pools, archery and scooters to move around the ship. There could even be underwater cruises – a chance to see beneath the ocean as you travel between destinations.

The cruising experience will become far less formal with more affordable options available. In twenty years, it is possible that passengers will go self-catering on cruise ships with small kitchenettes in their cabins, buying food and drink from on board supermarkets and dressing for dinner will be a thing of the past.
Ssshhh, This is a Beach!
As hand-held technology takes off, the desire for freedom from mobile phones and other devices will become paramount when people go on holiday. We predict that ‘phone free beaches’ will become commonplace in 20 years time as a result. You may see beaches categorised as: Quiet beaches, Party beaches and Family and Activity beaches as they become customised to meet the specific needs of future holidaymakers.

The Real Holiday Experience
There is set to be a huge growth in watching and playing sport on holiday including less mainstream sports such as rodeo in Las Vegas, surfing trips to Hawaii and snowboarding championships in Colorado. The next twenty years will also see a surge in demand for adrenaline sports and desire for ‘real’ experiences – such as whale watching and swimming with dolphins. ‘Experiences’ will be increasingly packaged up and available meaning that holidaymakers will be constantly looking for the next big thing. Relaxation holidays involving yoga, spas and ayurvedic treatments will also become more mainstream.

Destinations of the Future
Qatar is expected to become a mainstream holiday destination in the next twenty years, featured by up to 50 holiday companies. UK tourist numbers will grow tenfold from just 150,000 in 2002 to 1.5 million in five years and are expected to far exceed that figure by 2024. Families will be attracted by traditional holiday activities like sea, beach and sun, while the country positions itself as offering ‘The Real Arabian Experience’. Qatar’s government plans major investment in promotion in the UK and on holiday facilities specifically for families. Only five hours away, the middle eastern country could become the new Canaries.
Ljubljana and other cities and resorts in Slovenia, Croatia and Montenegro will appeal to a new generation of travellers who don’t remember the Yugoslav conflict. Towns and cities that once few people had heard of will become mainstream. Access will be easier and cheaper with the growth in no frills flights. Holidaymakers looking for ‘the new Prague’ can combine sightseeing, excellent food and skiing based in a beautiful city just an hour’s drive from Austria and Italy.

Slovakia’s entry into the EU in 2004 will make the country more accessible for people wanting to get away from traffic, pollution and stress. The destination is shaping up to become the short-haul equivalent of New Zealand by developing a niche for outdoor adrenaline sports. Tourists could travel to Slovakia for activities such as bungee jumping, jet boating and tandem skydiving in the future. It will also meet a growing demand for ‘well being’/spa breaks and nature activity holidays featuring climbing, hiking and horse riding.

Brazil’s potential as a hugely popular, mass-market holiday destination is vast but is dependent on improved infrastructure and hotel development. The country has all the ingredients for a perfect holiday – great beaches, the Amazon rainforest and incredible cities like Rio. A fledgling package holiday market is set to grow with more flights and lower prices.

On the Backpacker Trail
Where backpackers go first, more traditional holidaymakers follow. Kyrgyzstan and Turkmenistan are two central Asian countries expected to grow in popularity as grandchildren follow in the footsteps of their hippy grand parents and travel along the Silk Road. Already the world’s fifth most popular tourist destination according to the World Tourism Organisation, China will attract more holidaymakers as it becomes more accessible and affordable. The country is predicted to be the most visited destination in 20 years time due to its culture, history and natural beauty.
Social Trends of the Future

The society of the future will be characterised by:

- Increased numbers of single people and fewer children
- An ageing population… but the over-50s will think and act younger

New societal trends mean we’ll expect different things from our holidays:

- Holidays that are designed for the individual, and not perceived as packages for anyone and everyone
- Virtual tours of holiday destinations before we leave home
- As better informed, savvy consumers, we’ll demand higher quality services on holiday

A nation of singletons

With more and more people living alone in the future, holidays will need to change to cater for single people and offer better services for them. Singles of the future will demand and expect hassle-free, personalised service, taking a number of ‘quick escapes’ and at least one major holiday each year. Their busy lifestyles mean they’ll expect holiday companies to design packages for them from their accommodation to their transport to their favourite restaurants and provide a range of activities that they’ll enjoy. The single person supplement may be ditched to reflect this change.

60 is the new 40

In the 2020s, over-50s will outnumber younger generations. People in their early 60s will be the new 40-somethings and will be affluent, active and well travelled. These so-called ‘third-agers’ will look for holidays to suit their more active lifestyles and will be much better informed about what they want from their breaks. With no formal retirement age being a likely feature of the society of the future, there may be increased holiday segmentation by tour operators as they seek to meet the needs of an older and wiser society.

Third-agers will be more adventurous than ever, holidaying in the likes of Brazil, and flying to the Mediterranean at the drop of a hat for a short break.

The rise of the individual

The population of the future will show characteristics of greater individualism, personal mobility, individual freedom and choice – and we’ll expect holiday companies to offer us trips to reflect our individual tastes and requirements. Holiday companies will respond by providing segmented, specifically designed holidays with an emphasis on high quality, personalised service.
Virtual holidays
The internet will play a more influential role in people’s choice of holiday. Video chat rooms will become the norm, along with ‘virtual holidays’ allowing people to ‘walk through’ their rooms and the local village before they’ve left their home.
Increasingly sophisticated technology will mean internet travel agents will be capable of pushing tailor-made ‘holiday alerts’ to customers, with flights, hotel, attraction tickets and tables at favourite restaurants all individually packaged.

It’s all about me!
The customer of the future will be more demanding than ever, more self-indulgent and hedonistic. We’ll also be a more knowledgeable society, making us increasingly cynical and distrusting. As a result, we’ll expect holiday companies to provide high quality services to us and to tailor holidays that meet our lifestyles.
The Hotel of the Future

THE VISION FOR THE HOTEL OF THE FUTURE

- A transportable hotel pod that moves around the globe
- Hotels with built in waste disposal systems - self-sustaining hotels that don’t blight local environments
- ‘Active’ rooms that can be adapted to the requirements of each individual
- Enhanced IT infrastructure in hotels as more people combine work with leisure

Holiday pods

In the future, we may be taking our holidays in hotel pods that can be moved to any destination. These ‘pods’ could be located anywhere from the Australian rainforest to the Antarctic. These futuristic pods can remain in place for up to 15 years, or could be dismantled as demand drops and falls for destinations. Constructed on stilts, the holiday pod is designed such that it will leave only the smallest of imprints on the local environment. Holidaymakers would arrive by helicopter from the nearest airport or port.

The Mobile Hotel

Sustainability will be key to the design of the holiday pod. The pod will be located close to indigenous local communities with minimum disruption and damage to the local environment. Developed off site, it would be transported to the final location and assembled in-situ. Each pod would be pre-fabricated and self-sustaining, easily transportable from site to site. All waste produced by the hotel pod would go into a waste disposal unit at the base of the structure.
The Hotel of the Future

Changing rooms
We’ll demand holidays that are personally tailored for us in the future, and the holiday pod will reflect this with different sized rooms available that can be upgraded or downgraded according to our travel budgets. Inside the rooms, ‘active’ walls and floors will show changeable images, enabling guests to set whatever mood they wish, be it an ocean view or a jungle look out.

Technology trips
In the future, work and leisure will become blurred and many people will take ‘soft holidays’ where they combine work with holidays. The hotel of the future will cater for this with sophisticated technology available in each room so mum and dad can hot-desk from their hotels, and the kids have access to all the latest computer games and can ‘chat’ with their friends whenever they like.
Sustainable Tourism

KEY TRENDS IN SUSTAINABILITY

- A seismic shift in people’s awareness of the environmental impact of mass tourism
- A new social awareness – interest in authentic, small and local holiday experiences
- ‘The ‘new tourist’
- More DIY travellers

Sustainable Understanding

Less than 1% of people seek out sustainable holidays now but this number will grow to 5% over the next 20 years. As people’s understanding of the issues surrounding sustainable tourism grows, the negative impact of mass tourism will detract from the holiday experience leading holiday companies to offer breaks that protect or benefit the environment. Schemes such as a global accreditation scheme for sustainable tourism may be created making information about more responsible holidays more readily available.

Social Awareness

There is already an existing trend towards people wanting to experience local cultures and this is set to continue. More holidaymakers want fulfilment and rejuvenation rather than places and things – this new social awareness results in increased interest in cultural connections with local people and the differences and the sensitivities that surround such experiences. Large holiday companies must be seen to be benefiting local economies throughout the purchasing chain, as consumers will demand sustainability policies and corporate responsibility from holiday groups.

New Tourists

The ‘new tourist’ of the future will use local guides, eat in local restaurants, source quality local produce, take small group cultural/environmental excursions and be sensitive to clean and pristine environments. He/she will have a heightened appreciation of cultural differences and sensitivities. Tour companies must add a new dimension to the quality and added value element of holidays by reducing the negative impact of tourism and enhancing the positive. Tour operators will ‘tell the story behind the destination’ in an evocative way to re-connect the buyer with the local seller.

The Changing Tourism Market

The internet and growth in competition has seen travellers becoming increasingly experienced and demanding in terms of flexibility and choice of destinations. Equipped with better knowledge and understanding, holiday makers will take an increasingly DIY approach to their holidays, searching out trips that conform to their new social awareness.
Travel Health

HEALTH TRENDS THAT WILL AFFECT FUTURE HOLIDAYS

- Preventing over eating/obesity will become a priority for travel companies
- Holiday companies will work more closely with the medical profession
- Travellers will be better educated about holiday health risks in general

Obesity
An estimated 300 million people around the world are obese. Conservative estimates, based on current trends, show that obesity levels will continue to rise in the early 21st century - with severe health consequences - unless urgent action is taken. As the scale of the problem escalates, tour operators and hotels will put greater emphasis on meal planning to consider low calorie and cholesterol levels for all holidaymakers. We predict that menus will need to include detailed dietary information.

There may be more focus on diet and exercise in resorts to allow people to continue their weight management regimes while away from home. In addition, airlines may even consider re-designing their seating layouts to allow for the greater number of overweight passengers.

Travel and health in tandem
With predictions that there will be a rise in travel to exotic and far-flung destinations, travellers will need to be better educated about holiday health risks in general and what local medical facilities are available at their destination.

As a result, over the next twenty years, travel and medical professions are likely to develop a much closer working relationship. Travel agents will be far more proactive in offering health advice to tourists, consulting with medical bodies to ensure they are providing up-to-date information about vaccinations as well as other health issues such as sun protection.
A mobile revolution
With the future development of 3G technology, our mobile phones will become personal communicators pushing pertinent information to us in the future. More than just a phone, we’ll use our mobiles on holiday to plan and organise every aspect of our trips. With the advent of 3G, our phones may even be able to communicate with inanimate objects. For example, on holiday, we could point our phone at a car-rental sign and our phone will provide us with details of hire costs, models and availability.

Virtual holiday reps
The internet and digital television will play an increasing role in the holiday booking process. Artificial Intelligent Agents within our computers will learn our personal likes and dislikes, offering a highly personalised service. These Artificial Intelligent Agents will have faces and voices and they’ll know what we want from our holidays and send us relevant information to help us make decisions.

Get away from it all... at your PC
As people increasingly socialise in virtual reality and networked communities, we’ll be able to enjoy a virtual holiday experience from the comfort of our home. Simulators of the future will provide a holiday experience where you can ‘visit’ a destination, chat to fellow virtual travellers and check out the local culture without ever stepping foot outside your door.
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