

# SUSTAINABILITY: THE GARDEN OF EDEN IS NO MORE

Davos2019



“Anyone who believes exponential growth can go on forever in a finite world is either a madman or an economist.”

**Kenneth Boulding**

# KENNETH BOULDING TO CONGRESS



# Immediate inconsistency

## **Corporate Enthusiasm**

A crucial part of their Environmental, Social and Governance (ESG) credentials

## **Customer Indifference**

Wholly dependent on the motivation of customers

Sustainability is a *factor* in people's choice

But currently below price and desirability

Fewer than 15% of clients are willing to pay more for sustainability

## **Destination Impulse**

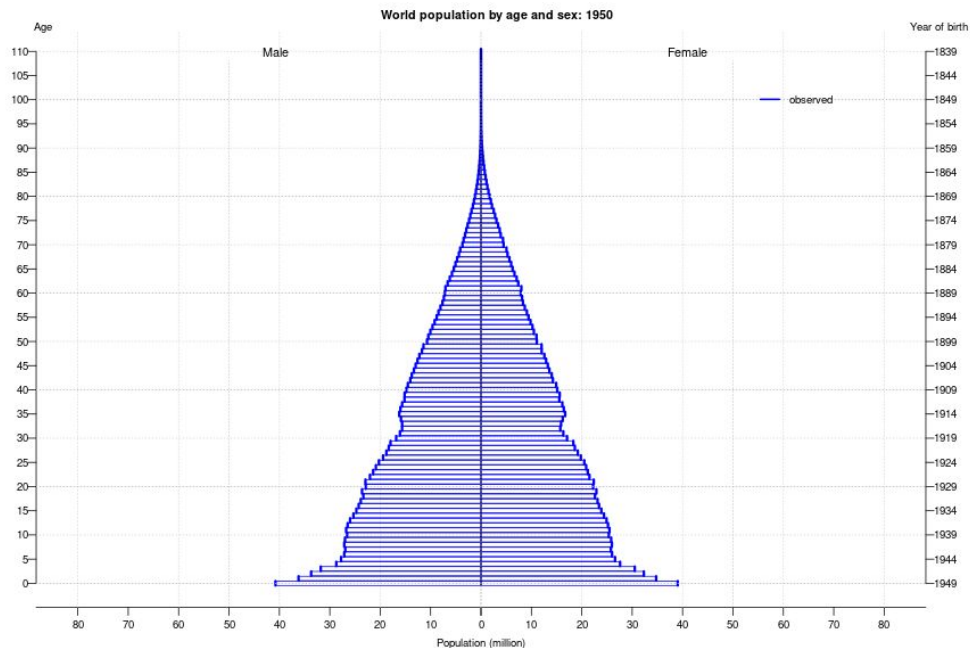
Individuals exploring remote areas

Second-time visitors

Small Groups/self drive

# Future: Past

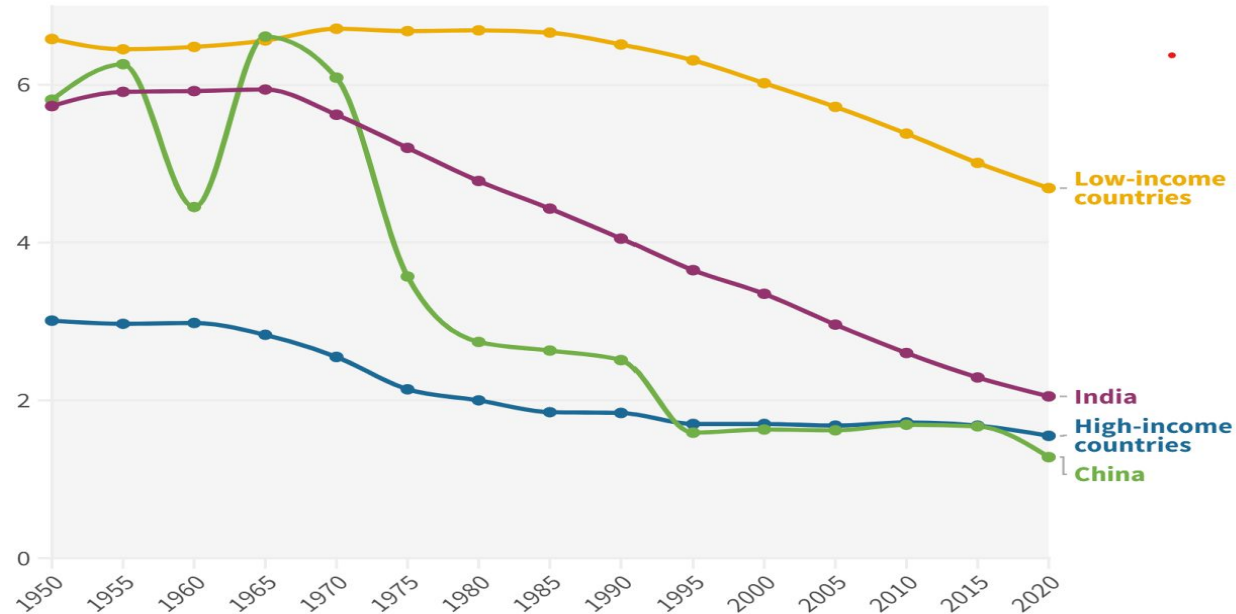
## World population pyramid 1950



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United Nations, DESA, Population Division. *World Population Prospects 2024*. <http://population.un.org/wpp/>

# Population Crisis

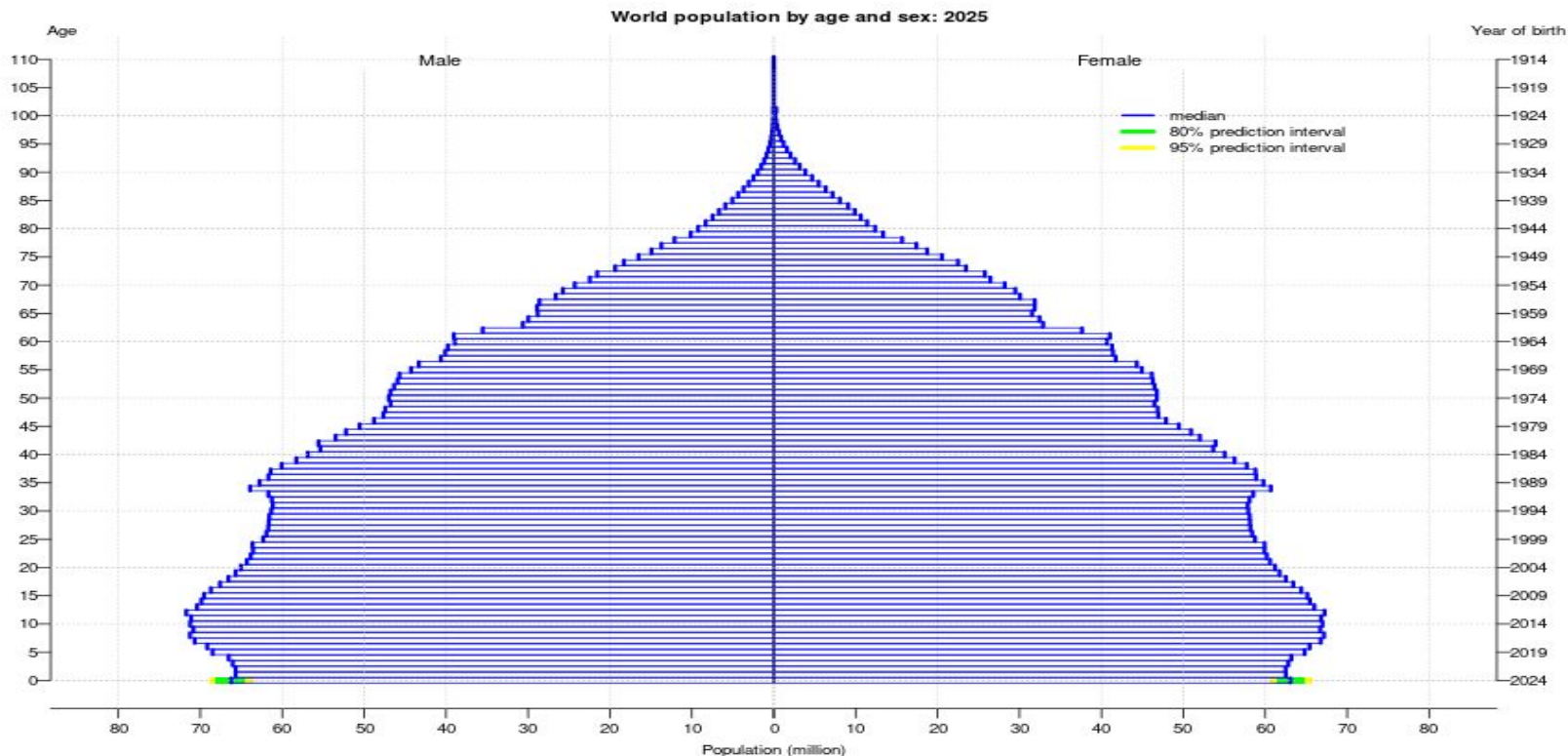
Total Fertility Rate by Year



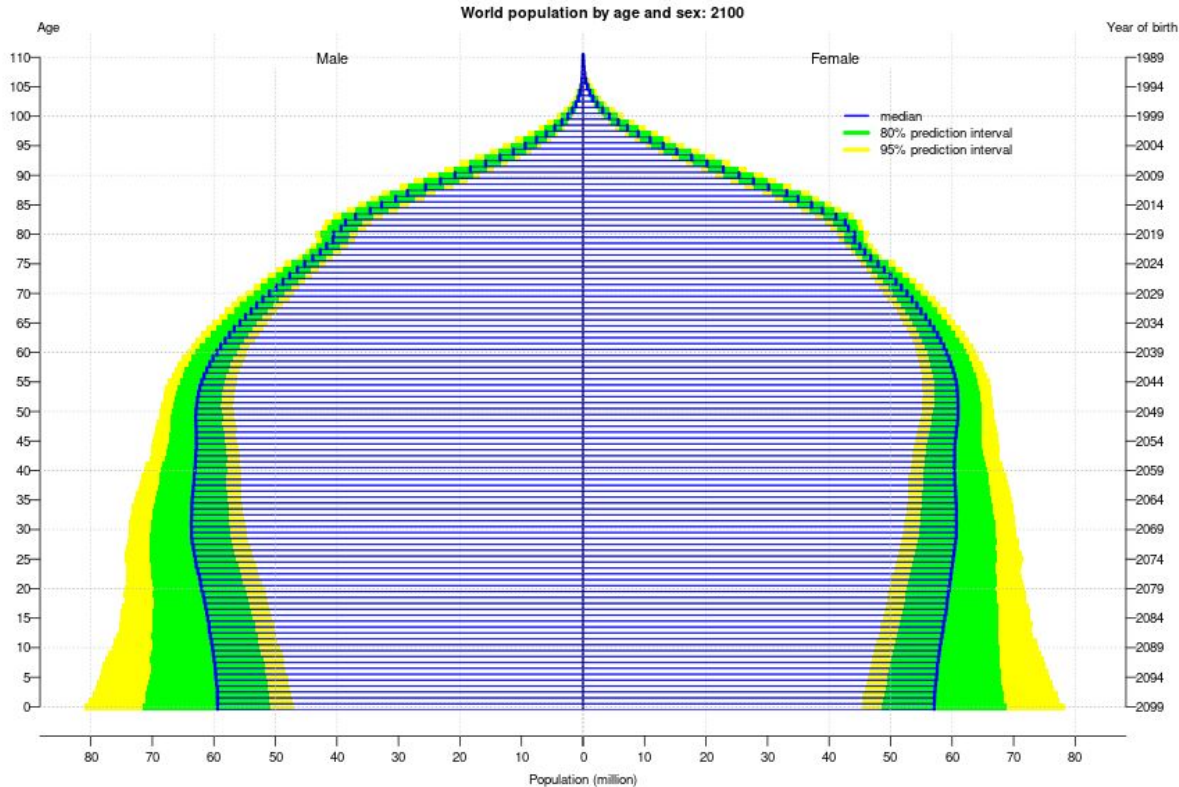
# Replacement rate 2.1

	2020	2050	
China	1,425	1,313	<b>-8%</b>
Japan	126	106	<b>-16%</b>
Korea	51	52	<b>1%</b>
Brazil	216	238	<b>10%</b>
USA	340	400	<b>18%</b>
India	1,396	1,671	<b>20%</b>
Nigeria	206	400	<b>94%</b>

# World population pyramid 2025

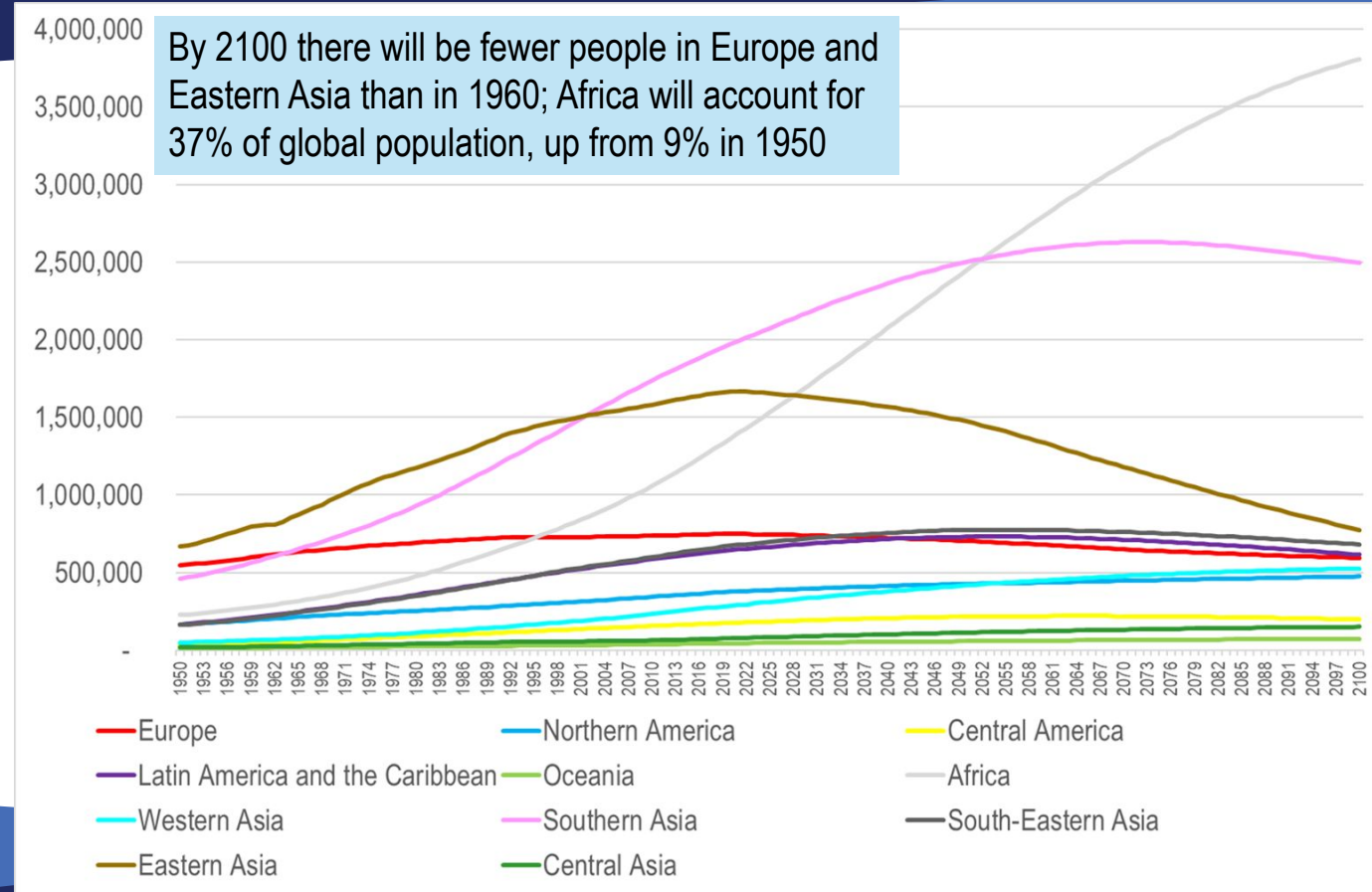


# World population pyramids 2100



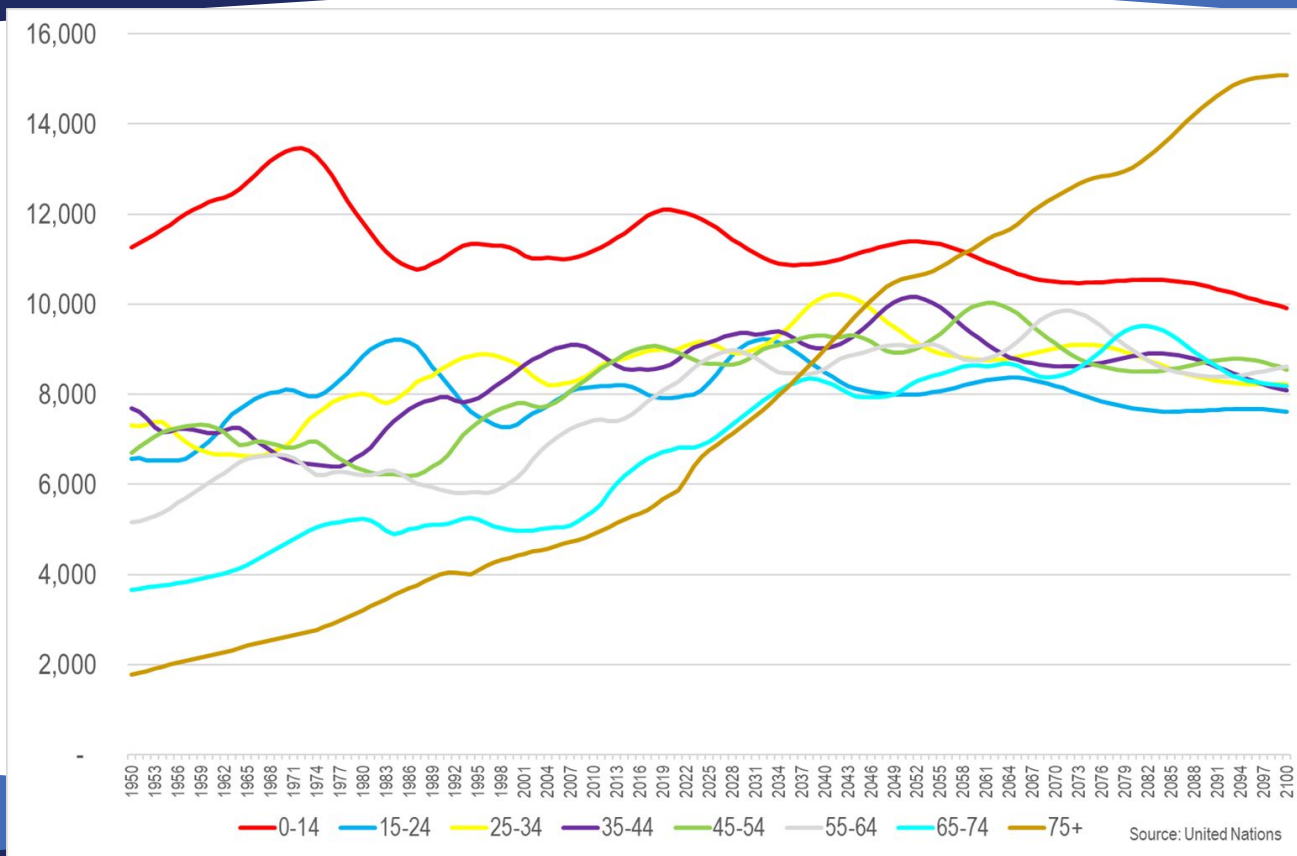


# Global population estimates and projections 1950-2100

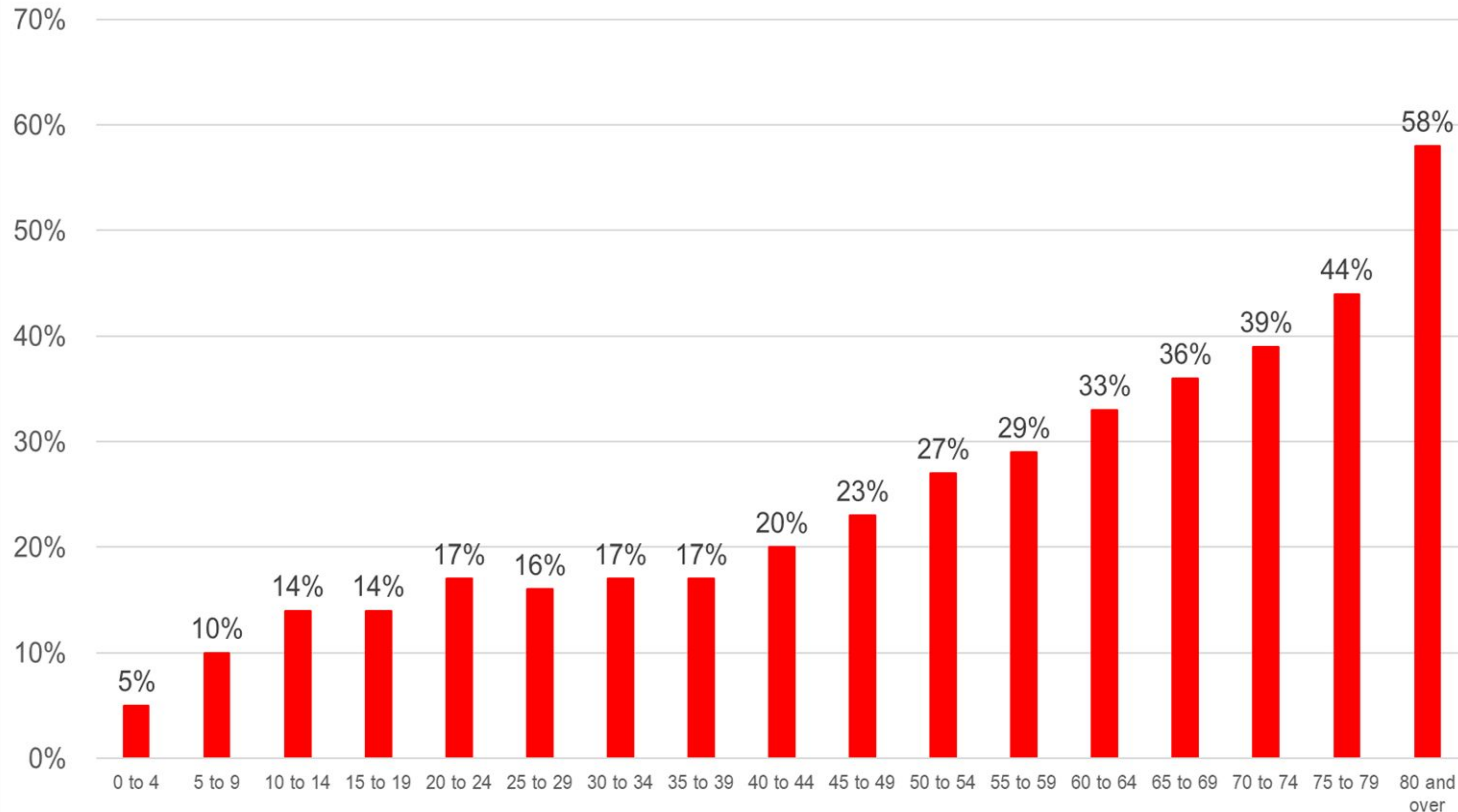


# UK population estimates and projections 1950-2100

(000s)

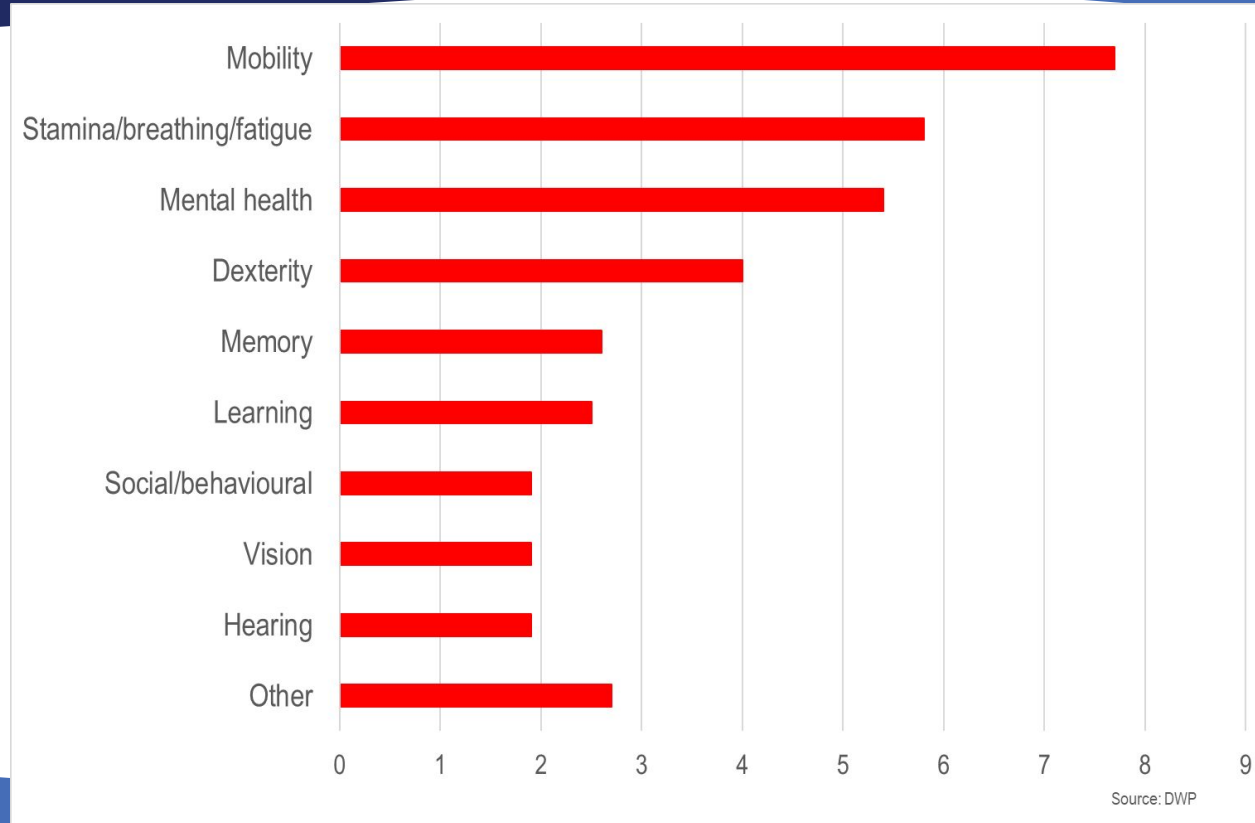


# Percentage of UK population with a disability



Source: DWP

# Impairment types reported by UK population (millions of people)



# Implications for origin markets

- Aging population  
    dependency ratio  
    places strain on economy
- Shortage of workers
- Increased concentration of wealth
- Less competition for space
- Huge change in culture of society

# Implication for destinations #1

- a) Look to India
- b) Look to Africa

# Implication for destinations #2

## **Client base dramatically older**

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- 70+
  - Represent 50% of target market
  - Have the money
  - Have the time
- Will suffer from impairments
  - Principally mobility

**Perfect target market for escorted coach tours**