



MASTER THESIS

FLOURISHING BUSINESS STRATEGY FOR WINE TOURSIM

Application of the Flourishing Enterprise Strategy Design Method with three wineries

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ABSTRACT

When harnessed strategically, business planning can drive sustainable development by enabling users to build sociocultural, economic, and environmental sustainability into the structure of a business, and thereby its strategies and operations. Sitting at the intersection of the agricultural, production, and tourism industries, wineries can contribute to sustainable development in diverse of ways. However, frameworks for understanding sustainable wine tourism are limited and there are few resources available to winery managers looking to strategically integrate sustainability into tourism enterprises.

In Spring 2023, Bannikin, a Canadian tourism consultancy, and Antony Upward, the originator of the Flourishing Enterprise Strategy Design Method and the Flourishing Business Canvas, collaborated with the Tourism Industry Association of Canada and the Indigenous Tourism Industry Association of Canada to test and refine sustainable business planning tools and methodologies for the tourism industry in a pilot project called Flourishing Business Strategy for Tourism (FBST).

This master's thesis applies the business planning tools and methodologies developed as part of the FBST project to understand how they can be adapted for wine tourism businesses. The methodological approach for this project involved a literature review, resource scan using key search terms, business planning and visioning sessions with three (3) case study wineries in France, Spain, and Portugal, a post-session participant questionnaire, and facilitator reflection exercises.

This research project resulted in recommended adaptations to Bannikin's next iteration of the FBST project and a reference sustainable business model canvas for wineries. The business planning tools and methodologies developed through the FBST project, and refined through this thesis, will be used by Bannikin and partners in Canada and internationally to grow sustainability in the tourism industry.

Keywords

Wine tourism, Sustainability, Business model design, Business planning, Flourishing Enterprise Strategy Design Method

List of Abbreviations

CSR: Corporate Social Responsibility

F2B2: Future-Fit Business Benchmark

FBC: Flourishing Business Canvas

FBST: Flourishing Business Strategy for Tourism

FESDM: Flourishing Enterprise Strategy Design Method

OIV: International Organisation of Vine and Wine

PESTLE: Political, Economic, Social, Technological, Legal, Environmental

SDGs: Sustainable Development Goals

UNWTO: United Nations World Tourism Organization

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1. INTRODUCTION:

The Sustainable Development Goals (SDGs) were set eight years ago, in 2015, providing a “blueprint for peace and prosperity for people and the planet, now and into the future” (United Nations, n.d). There are seven years remaining if they are to be realized by the 2030 target set in *Transforming Our World: the 2030 Agenda for Sustainable Development* (UN General Assembly, 2015). The SDGs were designed to be strived towards by all countries and stakeholders, and according to the United Nations World Tourism Organization, tourism has the potential support all 17 SDGs directly or indirectly (UNWTO, n.d.a.). Sitting at the junction of the agriculture, production, and tourism industries, wine tourism has outsized potential to contribute to these goals. Although efforts to grow sustainability in the wine and tourism industries are underway, there are few frameworks to outline what sustainable wine tourism means (Trigo & Silva, 2022) and research into the role of sustainability in winery corporate strategy is limited (Montella, 2017). This thesis explores how business planning and modelling can be used by wine tourism businesses to build sustainability into their strategies and operations. This is done by testing tools and processes developed in the Flourishing Business Strategy for Tourism (FBST) project undertaken by Bannikin, a tourism consultancy.

This report includes: 1) Introduction, 2) Methodological Approach, 3) Results and Discussion, and 4) Conclusions. *Introduction* gives an overview of Bannikin where the researcher interned, related duties, and information on how these relate to this thesis project. *Introduction* sets the theoretical foundations of this work by exploring wine tourism and sustainability, business model design, the Flourishing Enterprise Strategy Design Method, and backcasting against principles for future-fitness. *Methodological Approaches* describes how the research was undertaken by outlining data collection, analysis, and interpretation for each method used, namely, a literature review, resource scan, and case study interventions via far-future business planning and visioning sessions, participant post-session questionnaires, and facilitator reflection exercises. *Results and Discussion* reviews research findings and introduces the resulting reference business model canvas for wineries. Finally, *Conclusions* integrates lessons from the FBST project to provide considerations for the next iteration of the pilot, discusses limitations of the research, and identifies opportunities for future research. This thesis has practical applications made obvious through the two main outputs, the reference canvas and the recommended changes to the FBST that will be rolled out in a national program and international professional services stream.

1.1 Company Overview

Bannikin is a Canadian tourism consultancy focussed on two areas of work: 1) strategy and development and 2) public relations. Bannikin was incorporated in Ontario, Canada in 2011 and amalgamated in 2019. Over the past 12 years, Bannikin staff have worked on projects around the world for clients ranging from municipal economic development offices to small business owners to tourism industry organizations. As of June 2023, Bannikin has seven staff. In Bannikin's public relations work, the company helps travel companies connect with customers in North America. Amongst other activities, this means producing press releases and coordinating media familiarization tours. Bannikin also works with tourism organizations to co-create strong destination brands and develop their storytelling capacity to attract target markets. As part of its strategy and development work, Bannikin uses community-based participatory research to inform decision-making on how businesses and organizations can leverage tourism development opportunities to support community wellbeing economically, socially, and environmentally. Bannikin takes a capacity-building approach, which sees the team work closely with their clients across all projects to co-create value and promote successful implementation. Bannikin historically specialized in outdoor and adventure tourism, but in recent years, under new leadership, Bannikin is increasingly taking on projects related to agritourism, food and drink tourism, rural tourism, and cultural tourism. Bannikin staff undertake diverse projects such as, community engagement and facilitation, research projects, destination development, strategic planning, and visitor experience assessments.

1.2 Internship Duties and Activities

During the internship at Bannikin, the researcher worked on the strategy and development team. Responsibilities included developing research and engagement tools, undertaking desk best practice and competitor research, conducting interviews, facilitating engagements, report writing, and liaising with clients. Of particular importance to this thesis, is the key role the researcher played in Bannikin's work with the Tourism Industry Association of Canada and the Indigenous Tourism Association of Canada. Considering time allocation and budget, it is Bannikin's biggest project of 2023 so far. The project, *Flourishing Business Strategy for Tourism* (FBST), is a nation-wide pilot to develop sustainable business planning tools and methodologies for the Canadian tourism industry. This project is expected to include two rounds of piloting, with the first completed in Spring 2023 and the second scheduled for Fall 2023. The project has at its foundation the Flourishing Enterprise Strategy Design Method (FESDM) and the Flourishing Business Canvas (FBC). Antony Upward, originator of the FESDM and architect of the FBC was a pivotal team member of the FBST project, which saw

the team develop tools, resources, and procedures based on the FESDM and designed for the tourism industry and test these in the field. Key to this project was developing FBC reference models for different segments of the tourism industry. To narrow the scope of the work, the first-round pilot focussed on visitor-facing accommodations, food-service operators, and tourism organizations. Bannikin staff hosted workshops with tourism businesses in Winnipeg, Canmore, and Saskatoon and facilitated multi-week strategic exploration processes with three Canadian tourism organizations namely, the Indigenous Tourism Association of Canada (Vancouver), Cariboo-Chilcotin Coast Tourism Association (Bella Coola), and Regional Fundy Partnership (Saint John). See Figure 1 for a map of the pilot project interventions.

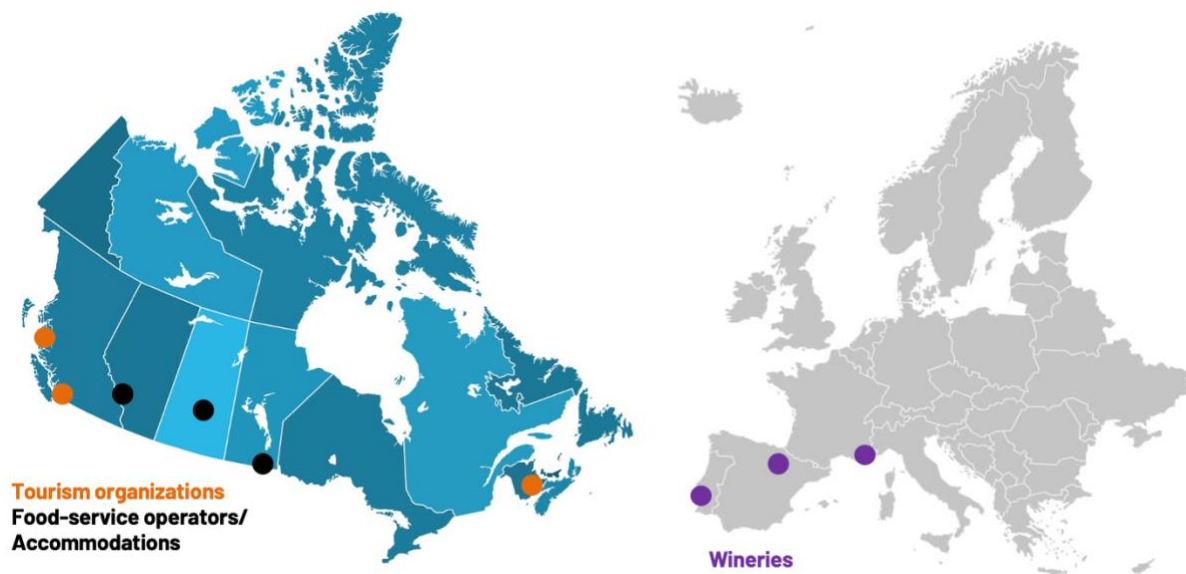


Figure 1: Map showing locations of pilot project interventions (left to right: Canada - Bella Coola, Vancouver, Canmore, Saskatoon, Winnipeg, Saint John; Portugal- Folgorosa; Spain- Labastida; France- Saint-Jeannet).

Through the internship the researcher was charged with expanding the pilot to include wineries. For this work, the researcher liaised with clients, conducted background reading on sustainable business planning for wineries, developed workshop materials, facilitated sessions, and analyzed research results. More specifically, the researcher had the opportunity to co-facilitate a workshop for accommodation businesses with Antony Upward and Bannikin Chief Executive Officer, Trevor Benson in Winnipeg. With first-hand experience of the FBST processes, the researcher replicated a similar methodology with three wineries in Europe: Vignoble Rasse in France, Dominio del Challao in Spain; and Quinta da Folgorosa in Portugal. The researcher analysed data collected through the interventions to provide adaptation recommendations for the next iteration of the pilot. Using data from both pilots, the researcher produced a FBC reference model for wineries. It is expected that the resources and procedures developed for this project will turn into a new service stream for Bannikin's strategy and development department. On 1 June 2023, the researcher presented the results of this work

at a conference at the University of Coimbra called *Diversity and Sustainability: Opportunities and Threats in Tourism*. The presentation was called *Flourishing for Wine Tourism Businesses*.

1.3 Theoretical Background

The following subsection sets the theoretical foundation of this work. First, links between wine tourism and sustainability are explored including how this topic is approached in policy, wine and tourism industry organizations, and academic literature. Afterwards, business model design is considered as a tool to build sustainability into winery strategies and operations. Finally, the Flourishing Enterprise Strategy Design Method (FESDM), which forms the basis of Bannikin's FBST project, is introduced and its theoretical underpinnings are examined.

1.3.1 Wine tourism and sustainability

In the landmark Brundtland Report of 1987, the World Commission on Environment and Development, defined sustainable development as that which "meets the needs of the present without compromising the ability of future generations to meet their own needs" (United Nations, 1987, p.16) and set the foundation for incorporating sustainability into legislative and policy frameworks (Mondini, 2019). At a global scale with implications across industries, sustainable development was woven into the Millennium Development Goals in 2000 and later, the Sustainable Development Goals (SDGs) in 2015. As outlined in *Transforming Our World: the 2030 Agenda for Sustainable Development*, the SDGs "balance the three dimensions of sustainable development: the economic, social and environmental" (UN General Assembly, 2015, p.1) and are to be strived towards by all countries and stakeholders. Sustainable tourism has the potential support all 17 SDGs directly or indirectly (UNWTO, n.d.a.); however, the United Nations World Tourism Organization (UNWTO) highlights tourism's potential in five areas: 1) inclusive and sustainable economic growth; 2) social inclusiveness, employment, and poverty reduction; 3) resource efficiency, environmental protection, and climate change; 4) cultural values, diversity, and heritage; and 5) mutual understanding, peace, and security (UNWTO, 2017).

Bringing together the primary, secondary, and tertiary sectors, wine tourism sits at the intersection of the agricultural, production, and tourism industries and has large potential to support sustainable development (Trigo & Silva, 2022). Leading *wine* and *tourism* industry organizations see this and are committed to supporting sustainable development. In its 2020-2024 Strategic Plan, the International Organisation of Vine and Wine commits to supporting the wine industry's contribution to the SDGs, including by promoting environmentally friendly vitiviniculture, economic activity in line with sustainable development, and vitiviniculture as a

tool for social development (OIV, 2019). Recognizing the role of wine tourism in sustainable development, the OIV and the UNWTO signed a Memorandum of Understanding to promote wine tourism for rural development (OIV, 2020). At the business-level, the Porto Protocol Foundation, an industry-facing international non-profit institution, aims to mitigate climate change by facilitating dialogue and sharing good practices amongst businesses (The Porto Protocol, n.d.). Within academic literature, the relationship between wine tourism and sustainability is being examined from many perspectives and interest in the topic is growing (Montella, 2017). Some studies take a destination lens, looking at sustainable development from the regional level (Robinson, 2021, Zamarreño-Aramendia, 2021; *etc.*), and others examine activities wine tourism businesses can take to be more sustainable (Karagiannis & Metaxas, 2020). Some studies focus on environmental sustainability (Sun & Drakeman, 2020), others on economic aspects (Smyczek, *et al.*), and others still, on sociocultural connections (Andrade-Suárez & Caamaño-Franco, 2020). Before examining these links further, a brief exploration of wine tourism's many definitions is required. Wine tourism is often defined by its relationship to other types of tourism, where, it may be considered a sub-form of rural tourism (Robinson, 2021), agritourism (Carmichael, 2005), or gastronomic tourism and cultural tourism (UNWTO, 2019; Serra-Cantallops *et al.*, 2021). Alternatively, wine tourism is characterized based on visitor motivations and activities, whether that is "visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region" (Hall & Macionis, 1998, as cited in Carmichael, 2005, p. 186). Recognizing these diverse definitions, it is important to clarify that for this paper, references to "wine tourism businesses" signify vineyard-wineries with a tourism component. Standalone wine museums, retail shops, *etc.*, are not the focus of this thesis.

In striving for *sustainable* wine tourism, it is essential to consider all aspects of the winery business, including agriculture, wine production, and tourism (Trigo & Silva, 2022). At the same time, Poitras and Getz (2006) explain this must involve identifying and managing place- and case-based issues related to local resource use, the type of wine tourism being implemented, and the impacts this produces for local communities and the environment. Therefore, thinking beyond the business is essential to sustainable wine tourism development. Wineries can contribute to the social, environmental, and economic wellbeing of their staff, communities, and beyond (Trigo & Silva, 2022; Karagiannis & Metaxas, 2020; Filopoulou & Frittella, 2019). On the agricultural side, the preservation of viticultural landscapes, the use of culturally significant grape varieties, erosion mitigation, water management, waste reduction, and the promotion of economic resiliency through crop diversification are some examples (Trigo & Silva, 2022; OIV, 2019,). In wine production and distribution, wineries can source renewable

energy and reduce packaging weight to lower carbon emissions in transportation (Sun & Drakeman, 2020; Trigo & Silva, 2022). For the tourism side of a winery, sustainability initiatives include celebrating local terroir and traditions via procurement, implementing measures to reduce negative social impacts of alcohol consumption, offering low-carbon transportation options to visitors, and reallocating staff across seasons for year-round employment (Trigo & Silva, 2022; UNWTO, 2016; Filopoulos & Frittella, 2019). Several programs recognize and share sustainability initiatives at wineries. Great Wine Capitals, for example, hands out an award for sustainable practices in wine tourism (Great Wine Capitals, n.d.), and the Porto Protocol Foundation (n.d.) shares practical sustainability initiatives applied by wineries.

With these steps to sustainable development in mind and recognizing documented negative impacts that both the wine and tourism industries can have on communities and regions (Christ & Burritt, 2013; Trigo & Silva, 2022) the debate over how to balance social, environmental, and economic aspects of sustainability in tourism must be explored. There is an ingrained difficulty in this task stemming from tourism's multi-sectoral and multi-disciplinary nature (Sigala, 2008). At the same time, there is uncertainty over which sustainable tourism indicators should be used to measure and drive progress of the SDGs (Mostafa *et al.*, 2020, UNWTO, 2019). Limited academic attention to the topic, a lack of consensus on measurement tools, and challenges establishing causal links across a wide system make it difficult to draw overall conclusions on wine tourism and sustainability, or measure benefits against impacts (Trigo & Silva, 2022). Moreover, since wine tourism sustainability can be explored at the farm-level, the business-level, the regional-level, nationally or even globally (Montella, 2017), measuring externalities is challenging. Tallying up impacts is difficult, because, as Trigo and Silva (2022) point out, there are few conceptual frameworks to understand the diverse factors surrounding sustainable wine tourism, or what sustainable wine tourism business models look like. One workaround, as expanded on later in this paper, is to apply frameworks that can be used for diverse systems, such as the Framework for Strategic Sustainable Development, which offers a "unifying and operational definition of sustainability, and a systematic approach to planning and acting for the fulfilment of it" (Broman & Robèrt, 2017, p.3), and can be applied to any system, including businesses, to help the transition to sustainability (Broman & Robèrt, 2017).

Regardless of measurement shortcomings, as this subsection has outlined, there are actions wineries can take to grow sustainability at the business-level, community-level, and beyond (Trigo & Silva, 2022). For wineries to be sustainable businesses, however, sustainability must be built into all their structures and processes, from strategy to operations (Montella, 2017). Business model design is one way of doing this. The relationship between business model design and sustainability is explored in the next subsection of this paper.

1.3.2 Business model design and sustainability

Governments and not-for-profit organizations are well positioned to push the sustainable development agenda forward; however, private tourism enterprises should not be underestimated as actors for driving sustainable (or unsustainable) development via their business practices. Through thoughtful design and collaborative action, sustainability can be woven into tourism businesses and the tourism industry (Trigo & Silva, 2022). Wineries are well placed to drive this charge with many already boasting strong local links and business plans “far more focused on the regional development and their social and institutional relationships than other businesses in the tourism sector” (Trigo & Silva, 2022, p.2). Motivations for implementing sustainability initiatives can be internal and external, with value-based pressure from staff an example of internal motivation and visitor demand or regulatory directives examples of external drivers (Karagiannis, D., & Metaxas, T. 2020). The UNWTO acknowledges the growth opportunities and benefits companies receive from committing to sustainability and promotes the SDGs as a framework for corporate social responsibility (CSR) management (UNWTO, n.d.b; UNWTO, n.d.c.). Although, there is a business case for CSR, the return-on-investment for such initiatives is stronger when these respond to the needs of the business’ primary stakeholders (Barnett, 2021). As demand for sustainable wine and tourism grows, managers are increasingly seeing the business case for integrating sustainability into their value propositions and seek ways to do this. (Trigo & Silva, 2022). A variety of resources, including training programs, self-assessments, and certifications, *etc.* are available to tourism businesses looking become more sustainable. Examples include, B Corp Certification, which recognizes businesses with a high social and environmental performance (B Lab, n.d.); the Future-Fit Business Benchmark (F2B2), a tool to help business be part of the “transition to an environmentally restorative, socially just and economically inclusive future” (Future-Fit Foundation, 2021); and Tourism Enterprise Sustainability a website and toolbox for sustainable tourism entrepreneurship (TENS, n.d.). Some resources, like TENS, are specific to the tourism industry and others, such as B Corp and F2B2, apply to businesses generally. Particularly relevant to this paper, is the business model canvas, a tool that can be used by businesses to understand the value produced by their enterprise, the activities related to producing this value, and what this means for the sustainability of their business.

Although the term “business model” emerged in the 1950s, the concept took off in the 1990s with the rise of the Internet and wider access to information technology (Osterwalder *et al.*, 2005). Osterwalder *et al.* (2005) explain that a business model is a conceptual tool that (..) allows expressing the business logic of a specific firm” (p.17). Osterwalder was instrumental in introducing the canvas as a tool for business model design. His canvas has nine building

blocks specific to a business: key partners, key activities, key resources, value propositions, customer relationships, channels, customer segments, cost structure, and revenue streams (Osterwalder *et al.*, 2010). Increasingly popular, though not a new concept, is taking a systems approach to business modelling, which means considering the context in which the firm functions (Ackoff, 1974). Zott and Amit (2010) propose an activity systems perspective, looking at the interrelations of activities that create value within *and beyond* the firm, thereby including the activities of the firm's partners, suppliers, customers, *etc.* One step further, is considering the ecosystem in which a firm operates, including for example, the ecosystem services it relies on (Upward & Davies, 2019). As the Brundtland report makes clear, there are limits "imposed by the present state of technology and social organization on environmental resources and by the ability of the biosphere to absorb the effects of human activities" (United Nations, 1987, p.16). Recognizing that a business does not exist in a vacuum and is instead part of a broader system is foundational to sustainable business modelling because it accounts for externalities related to a firm's practices and is a step towards future-fitness (Upward & Davies, 2019). The next subsection explores a business modelling approach that attempts to do just that.

1.3.3 Flourishing Enterprise Strategy Design Method (FESDM)

The Flourishing Enterprise Strategy Design Method is a robust procedure to create a "strategic path for enterprises and their stakeholders to improve their performance financially, socially **and** environmentally" (Upward & Davies, 2019. p. 149) in an increasingly complex, volatile, uncertain, and ambiguous world. This procedure, championed by the Flourishing Enterprise Co-lab in Toronto, Canada, has at its heart the Flourishing Imperative which revolves around "sustaining the possibility for human and other life to flourish on our planet for [generations to come]. And flourishing means not only survival, but the realization of whatever we humans declare makes life meaningful—justice, freedom, and dignity." (Ehrenfeld, 2000 p.36, adapted in conversation by Upward & Davies, 2019). A key tool in the approach is the Flourishing Business Canvas (FBC), an innovation management and storytelling tool, that businesses and organizations can use to strategically plan their futures for integrated social, environmental, and financial results that will see humans and all other life on Earth flourish for generations to come. The FBC uses three contexts (*i.e.*, environment, society, and economy), four perspectives (*i.e.*, people, value, processes, outcomes) and 17 question blocks within these to help guide the user in filling out the canvas (*e.g.*, biophysical stocks, stakeholders, value co-creations, goals, *etc.*), for a total of 24 blocks (Elkington & Upward, 2016; Upward & Jones, 2016; Flourishing Business, n.d.). See Figure 2 for a visual reference to the FBC and Annex 1 for the FBC with guiding questions. Broman and Robèrt (2017) argue that planning for strategic sustainability happens at five levels, starting most broadly at the system-level and then moving

to [defining principles of] success, strategic guidelines, actions, and finally to tools. The FESDM can be used to plan for sustainability at each level, making it versatile tool that can be used by a variety of businesses (Kurucz *et al.*, 2017). Two conceptual elements foundational to understanding the FESDM, backcasting and future-fitness, are described in the next.

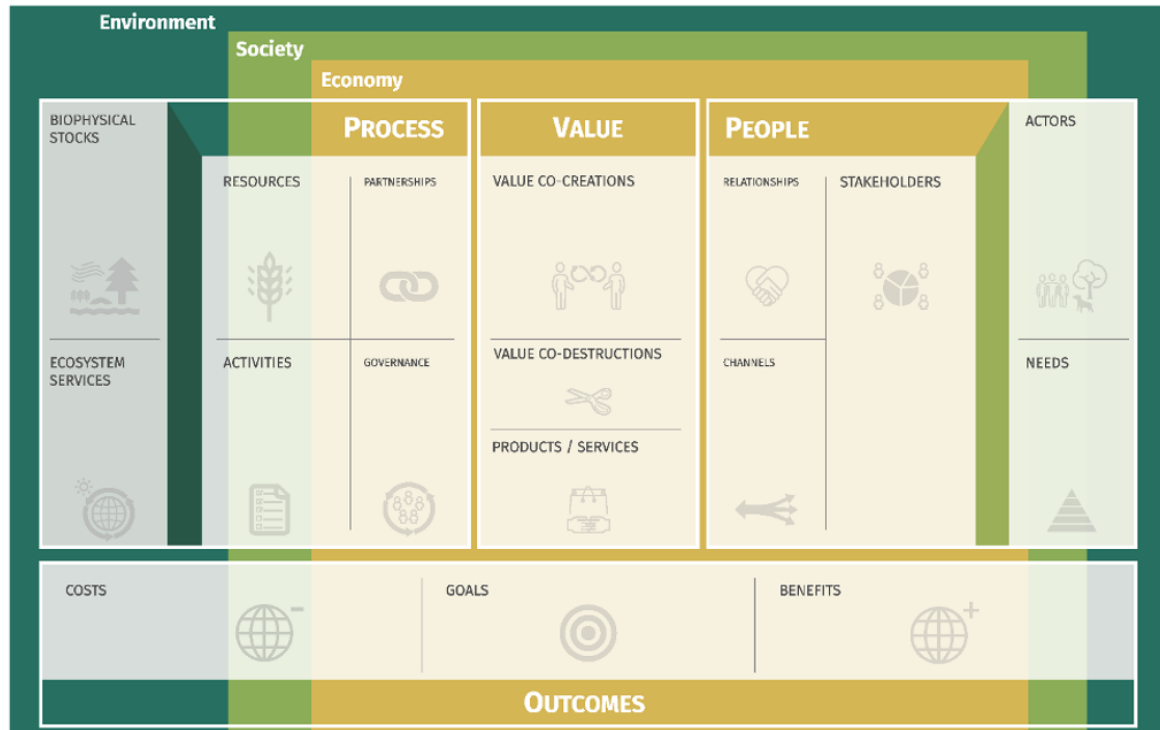


Figure 2: Flourishing Business Canvas, inclusive of contexts and perspectives. Used via Creative Commons BY-ND license. (Flourishing Business, n.d.)

1.3.4 Backcasting against principles for future-fitness

To design a truly sustainable business or merely adapt an existing business to make it *more* sustainable, it is essential to define what success looks like (Upward & Davies, 2019). By understanding what is being aimed for, it is easier to develop practical, measurable indicators, which as discussed earlier, is a challenge in measuring wine tourism sustainability (Trigo & Silva, 2022). The Framework for Strategic Sustainable Development (FSSD) responds to the need for a universal framework for understanding and measuring sustainability, and can be applied any system, including wine tourism businesses (Broman & Robèrt, 2017). For almost 30 years, the FSSD has been refined while helping “organizations in thoroughly understanding and putting themselves in context of the global sustainability challenge, and (...) move themselves strategically towards sustainability” (Broman & Robèrt, p. 1). More specifically, the FSSD helps organizations take a stepped approach to reducing their negative impacts on ecological and social systems while benefitting from innovation opportunities (Broman & Robèrt, 2017). The FSSD provides a “principled definition of sustainability useful as boundary conditions for backcasting planning and redesign for sustainability” (Broman & Robèrt, 2017,

p.10). Backcasting is a scenario analysis tool where the user defines a desired future and plans actions to move in that direction to close the gap between the present and goal future (Robinson, 1982). Backcasting has been used by organizations and firms around the world, like the Intergovernmental Panel on Climate Change and the World Council on Sustainable Development for sustainable strategic planning (Broman & Robèrt, 2017; Robinson, 2003).

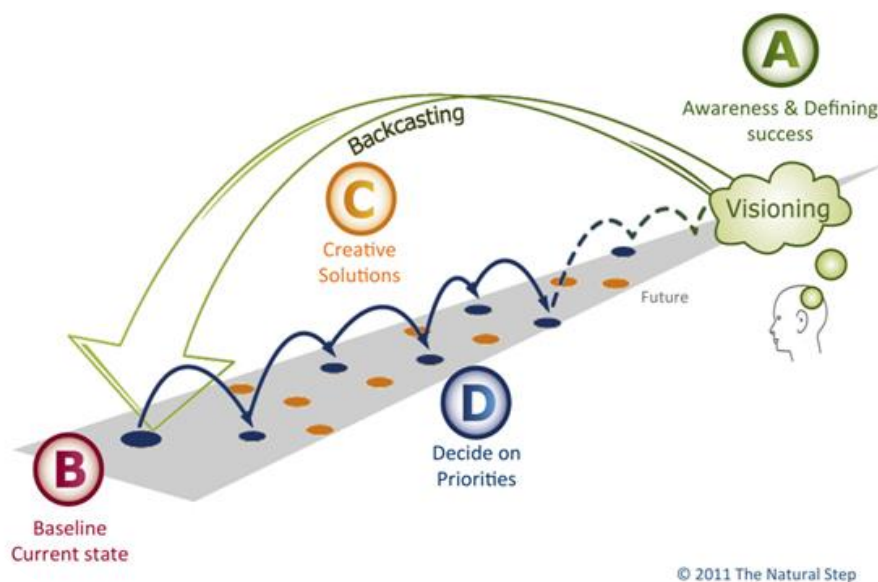


Figure 3: The Natural Step backcasting methodology. (The Natural Step, n.d.)

The rationale for backcasting stems from the fact that human predictions are constrained, and that the most likely future is not necessarily the most desirable one, especially when it comes to complex issues like sustainability (Robinson, 2003). Importantly, “backcasts are not intended to reveal what the future will likely be” (Robinson, 2003 p. 842), they are a chance to set goals and imagine what is possible. Unlike forecasting, where strategic decisions are made using projections informed by past and current states, backcasting sets a desired future and questions what the near-future can look like based on a desired future (Broman and Robèrt, 2017). To allow for futures significantly different than today, the endpoint for backcasting is set at least 25 and even 50 years away (Robinson, 2003). The Natural Step, an international non-profit organization on a mission to accelerate the transition to a sustainable society through strategic planning for businesses and organizations, uses a backcasting against principles approach based on the FSSD, to help users move to desired futures with four steps, named ABCD: 1) **A**wareness & Defining Success: creating a vision for the sustainable future of the business, 2) **B**aseline Current State: baseline mapping for gap analysis, 3) **C**reative Solutions: idea generation of potential solutions, and 4) **D**ecide on Priorities: choosing the most strategic path forward (The Natural Step, n.d.). This ABCD Backcasting Methodology is a key aspect of the FESDM (Upward & Davies, 2019). See Figure 3 for a visual representation of this backcasting methodology, which inspired the FESDM.

The changemaking power of backcasting; however, is limited by the future vision that is set. To move towards a sustainable society, it is essential that the future state be constrained by sustainability principles (Broman and Robèrt, 2017). To do so, the FSSD uses eight system conditions, namely, that in a sustainable society, nature is not subject to systematically increasing: 1) concentrations of substances extracted from the Earth's crust, 2) concentrations of substances produced as a by-product society, 3) degradation by physical means, and people are not subject to structural obstacles to 4) health 5) influence 6) competence 7) impartiality, and 8) meaning making (Broman and Robèrt, 2017). An application of this thinking is the Future-Fit Business Benchmark (F2B2), which offers an organizational benchmarking system with principles, goals, and indicators to design businesses that support a future-fit society and align with the SDGs (Future-Fit Foundation, n.d.). The Future-Fit Foundation defines a future-fitness as "operating in a way that doesn't harm people or planet" (Future-Fit Foundation, n.d.). The F2B2 recognizes planetary boundaries (Rockström *et al.*, 2009a; Rockström *et al.*, 2009b) and doughnut economics (Raworth, 2012; Raworth, 2017) in its 23 Break-Even Goals and 24 Positive Pursuits and provides a universal yardstick for assessing and comparing movement towards a sustainable society (Future-Fit Foundation, n.d.). The Break-Even Goals represent minimum performance levels businesses must meet to avoid surpassing the planet's ecological ceiling and to not fall below the social foundations necessary for human wellbeing as outlined in Raworth (2012), while the Positive Pursuits identify actions that businesses can take on to hasten progress to future-fitness. For a list of the F2B2 Break-Even Goals and Positive Pursuits, see Annex 2. The F2B2 aims to address shortcomings in existing sustainable business planning tools, namely: "(1) comparisons relative to a baseline year (e.g., the last reporting period), (2) relative to current best practice (e.g., best performers in an industry), or (3) relative to a company's own targets (e.g., to reduce CO2 emissions by 20% until 2020)" (Kurucz *et al.*, 107, p.p. 196). Conventional benchmarks that celebrate incremental and potentially ineffective progress do not consider planetary limits, and as such, do not provide businesses with the signals needed to successfully move towards sustainability, whereas the F2B2 is a benchmark based on science that shows the gap between true sustainability and the current state (Kurucz *et al.*, 2017). The FESDM uses the F2B2 Break-Even and Positive Pursuits (based on the FSSD's system conditions) as design principles to constrain the future state of a business (Upward & Davies, 2019). In other words, FESDM backcasts against the principles of future-fitness, and uses the FBC to visualize this.

Theoretical Foundations examined links between wine tourism and sustainability. Recognizing the lack of a universal framework for assessing wine tourism sustainability, this section explored the FSSD as a potential tool to do so and the FESDM as a practical approach that

can be applied by wineries. Next, this thesis applies the FESDM, via the FBST tools and methodologies, to wineries via case study interventions to begin to fill research gaps laid out in the literature review and study the value of these methods for wine tourism businesses.

2. METHODOLOGICAL APPROACH

Methodological Approach provides an overview of the research process of this master's thesis and details on data collection and analysis for each research method, which were a literature review, resource scan, and case study interventions with three wineries. Each intervention involved a half-day far-future business planning and visioning session, post-session participant questionnaires, and a facilitator reflection exercise. This section wraps up by outlining alignments between this work and Bannikin's FBST project.

The practical challenge of this thesis project is to inform the growth of the FBST project, which aims to drive sustainability in tourism via business planning. Specifically, this thesis seeks to understand how to apply the FBST tools and methodologies to wineries and support the production of an FBC reference model for wineries that Bannikin can use in future business planning workshops. It is hoped that learnings from this project will help to fill research gaps around sustainability frameworks for wine tourism. This project applied tools and processes developed for the FBST project, through interventions with three wineries in France, Spain, and Portugal. This thesis project was designed to answer one main research question: How can the FBST's business planning tools and processes be adapted for wine tourism businesses? Secondary research questions included: What sustainable wine tourism business modelling tools exist? What unique stakeholder needs and characteristics do wineries have that must be considered in wine tourism business modelling? Do the case study wineries see value in the FBST tools and processes and how likely are they to act in response to the interventions? What adaptations should Bannikin implement in the next FBST project?

2.1 Data Collection, Analysis, and Interpretation

2.1.1 Literature review

A literature review was conducted to understand the context surrounding the project, including the relationship between wine tourism and sustainability, and to contextualize the theoretical basis of business model design generally and for wine tourism specifically, with a focus on the FESDM. Specifically, this involved reviewing academic and industry texts about sustainable development and tourism, wine tourism and sustainability, sustainable business planning generally and for tourism businesses specifically, along with business model design and backcasting methodologies. The results of this work are presented in *Theoretical Background*.

2.1.2 Resource scan

An important finding from the literature review was that there are limited frameworks available to understand wine tourism sustainability. A resource scan was undertaken to understand from a practical industry perspective, the availability of sustainable business planning tools for wine tourism. The goal of this research was to see if there are resources easily available to winery managers looking to design a wine tourism business that will push the SDGs forward and contribute to a future-fit society. The resource scan used a web browser and key search terms, including “sustainable business planning wineries” and “sustainable business planning wine tourism.” Acknowledging the niche nature of wine tourism and seeing the few resources, the search also considered agritourism tools and resources using the search term “sustainable business planning agritourism.” For all three search terms, the quotation marks were dropped as no results were found with quotation marks. The first two pages of search results were considered in the analysis, producing a total of 75 unique hits, including sponsored ads, winery websites, blog articles, academic papers, master’s theses, and conference proceedings on a number of a sustainability and wine topics, courses, programs, certifications, guides, and toolkits. Discounting irrelevant sponsored adds and obvious sales pitches, 50 resources were reviewed during the resource scan. The scan specifically looked for tools and resources that could be used by wineries, such as how-to guides, toolkits, and workbooks. Of the 50 hits, 14 met this criterion. Academic articles were largely removed from during this process as they did not provide practical guides that could be applied by winery managers in business planning. Similarly, winery webpages which provided only piecemeal sustainability solutions were also discounted. During the analysis, resources were tagged as “wine/agricultural business resource,” “tourism businesses resource,” sustainability resource” or any combination these tags. For example, a report from the BC Wine Grape Council, *Sustainable Practices for BC Wineries*¹, was coded as both a “wine/agricultural business resource” and a “sustainability resource,” but since the document did not address tourism, it did not receive the “tourism business resource” tag. To inform the tagging process, the document search function was used to check for related words, such as “sustainable” and “tourism.”

2.1.3 Case Study Intervention: Selection Process and Winery Description

Case study research is a valuable and well-used methodology in tourism research (Xiao & Smith, 2006) and a key aspect of this master’s thesis. The methodology was selected because

¹*Sustainable Practices for BC Wineries:*

https://bcwgc.org/sites/default/files/Sustainable%20Wineries_Guidebook_Condensed_Feb%202016.pdf

the approach supports in-depth explorations of complex topics (Xiao & Smith, 2006). With this approach the researcher sought learnings towards a more holistic perspective (Yin, 2017). As the cases in this research project are existing businesses, the interventions have real-world applicability (Yin, 2017). It is hoped that learnings around intervention design and facilitation can be applied to Bannikin's work and to other practitioners and tourism researchers.

Table 1: Case study winery details

Case Details	Case 1	Case 2	Case 3
Name	Vignoble Rasse	Dominio del Challao	Quinta da Folgorosa
Location	Saint-Jeannet, France	Labastida, Spain	Folgorosa, Portugal
Travel time to nearby cities	Nice (30 minutes away by car)	Logroño (40 minutes away by car)	Lisbon (45 minutes away by car)
Appellation	IGP Alpes-Maritimes	DOCa Rioja	IGP Lisboa
Established in	1950s, restructured in 2014	2019	1711
Wine tourism offering details	• Tastings (individuals and groups) • Food/wine <i>apéro</i> • Retail shop • School tours	No yet offered.	• Tasting • Tour • Winemaker experience • Harvest experience • Picnic experience • Events (e.g., corporate, weddings, celebrations) • Live music in vines • Lunches & Dinners
Participant number and roles	1. Owner, agriculturalist, tourism, winemaker 2. Owner, tourism 3. Owner, agriculturalist, tourism, winemaker 4. Winemaker	1. Administration Manager 2. Intern	1. Hospitality Manager 2. Export Manager 3. Manager 4. Intern

The short lead-up and time constraints of this research combined with the limited time budgets of winery owners and staff, made case recruitment challenging. Therefore, a main selection criterion for the case wineries was availability and willingness to commit to participate across the intervention period. The researcher used personal connections and referrals to find cases interested in exploring sustainable business modelling. The recruitment and confirmation process involved: initial outreach communications to each winery describing the project, exploration of fit via messaging and calls, confirmation of participation, and decision-making around which winery representatives would participate. Although not always possible, attempts were made to include winery leadership and decision-makers in the interventions. The case study wineries included Vignoble Rasse near Nice, Dominio del Challao in Rioja Alavesa, and Quinta da Folgorosa north of Lisbon. The wineries are at different levels of wine tourism

development. Vignoble Rasse has tastings, a summer *apéro* hour, and a retail shop. Quinta da Folgorosa offers a range of visitor experiences from vineyard picnics to workshops. Dominio del Challao is in the process of planning what wine tourism could look like at the winery. See Table 1 for details of each case.

2.1.4 Case Study Intervention: Data Collection

It has been argued by Ackoff (1974) that the true benefits of planning come from the *process* of planning rather than the *plans* themselves. The interventions in this research involved working with winery representatives through a business planning process based on the FESDM. In planning, backcasting is a chance for desired futures and concepts of sustainability to emerge through “structured conversations about future options, consequences and trade-offs, that combine expert understanding with the knowledge, values, and preferences of citizens and stakeholders” (Robinson, 2003, p. 854). By making values explicit through the idealization of a desired future, these can be openly debated and improved over time (Ackoff, 1974). To foster this dialogue, lessons are pulled from Jaeger who argues that “(w)here scientific knowledge needs to be combined with moral and aesthetic judgement, a social setting that fosters nonspecialized dialogue is much more appropriate than the setting of applied science or professional consultancy” (1998, p. 198 as cited in Robinson, 2003). Recognizing this, the interventions were designed to be informal, but focussed conversations. In line with systems approaches, the facilitator was “responsible for making a concern with the whole permeate the treatment of every part” (Ackoff, 1974, p. 8). That is, pulling the system surrounding the wine tourism business to the fore.

More specifically, the interventions with each winery followed a process pulled from the FBST project, with the FESDM as a foundation. However, during the recruitment process it became clear that the winery representatives had limited time available. As such, the researcher shortened the full-day sessions designed for the FBST project to half-day sessions for the winery project. To make the most of this limited time, a decision was also made to turn these sessions into data-collection exercises, as opposed to the sessions being merely subject matter for the participants to evaluate. With this change, it became possible to also collect data to inform the development of a FBC reference model for wineries, a key task of the internship. Each intervention followed the same design, however, adjustments in timing and communications were made based on the needs of each winery. The intervention process can be broken into six steps: 1) Initial outreach and participation confirmation, 2) participant pre-work, 3) far-future business planning and visioning session, 4) post-session questionnaire, 5) facilitator reflection exercise, and 6) report back. To ensure alignment between the projects,

the same post-session questionnaire developed for the FBST project was used and translated into French, Spanish, and Portuguese. See Annex 3 for the English questionnaire. Like the FBST project, this thesis used 2045 as the far-future date from which backcasting took place. The interventions from initial outreach to report back lasted 1-3 months and took place between March and June 2023. For detailed information about each intervention step, see Table 2. Note, it is common to produce multiple FBCs for one business that can be linked, allowing the user to go into detail about various parts of the business (personal communications with Antony Upward, March 6th, 2023). For example, a winery can have three FBCs linked together to show how flourishing sustainability is woven into the agricultural, production, and tourism sides of the business. To contain the scope of this master's thesis, however, intervention conversations and the resulting FBC focussed on the tourism side of the winery business.

Table 2: Case study intervention steps, timing, and details.

Intervention Step	Timing	Details
Initial outreach and participation confirmation	1-2 months before session	Initial outreach sent to winery with description of the project, exploration of fit via messaging and video calls, confirmation of participation, decision-making around which representatives from the winery will participate.
2. Participant pre-work	2-4 weeks before session	Pre-work package sent to participants by email that included educational material to ensure participants enter session with base knowledge of future-fitness and the FESDM. The pre-work packages included links to introductory videos, results from interviews conducted by Bannikin staff with tourism futurists, and a worksheet for each business to introduce themselves in 2023. See Annex 4 for tourism futurist interview results.
3. Far-future business planning and visioning session	Day-of session	Focussing on the tourism-side of the winery, 2-4 participants from each winery were engaged in a presential half-day far-future business planning and visioning session. The session structure, based on the workshops offered in the FBST, included: • 2023 business introductions based on areas of the FBC, including stakeholders, needs, activities, goals, <i>etc.</i> • 2045 PESTLE development to help participants put themselves in 2045 and imagine political, economic, social, technological, environmental, and legal contexts surrounding tourism at their winery in the far-future, referring to tourism futurists interviews. • Discussion on 2045 future-fitness considering F2B2 Break-Even Goals tied to the winery and its stakeholders. • Reflection on the opportunities and challenges of moving towards 2045 constrained by potential context (PESTLE) and future-fitness (Break-Even Goals). • Development of headline news articles from 2045, planning steps to make that story a reality. • 2045 “why statement”/inspiring vision development. • 2045 goal statement development. • Introduction and familiarization to the FBC.

		2045 business introductions based on areas of the FBC, including stakeholders, needs, activities, etc., and comparison to 2023. The researcher facilitated each session and took notes in a Microsoft PowerPoint presentation displayed for participants to see, ensuring participant sign-off and accuracy of the notes taken. See Annex 5, for sample slides from PowerPoint template used in the sessions.
4. Post-session questionnaire	Immediately following session	A short online questionnaire was distributed to participants through a SurveyMonkey QR code at the end of each session to collect feedback on process and the likelihood of that they will implement changes based on learnings. To ensure maximize usability for Bannikin, the question set matched the one Bannikin distributed through the FBST project.
5. Facilitator reflection exercise	Throughout research and following each session	The researcher reflected on the success the case study interventions, using a reflection template produced by Bannikin as a base. In parallel to the thesis research project, the researcher also collected reflections related to interventions in the broader FBST project. See Annex 6, for a copy of the facilitator reflection template.
6. Report back	Project-wrap up	FBC reference model for wineries and other FBC materials shared with the wineries via email with option for a familiarization walk through for any interested winery representatives.

2.1.5 Case Study Intervention: Analysis and Interpretation

During the far-future business planning and visioning sessions, responses were group sourced from participants and agreed-upon in conversation. Responses from each session were given codes corresponding to the session, compiled, and translated to English. Responses were then grouped into themes. For example, 2045 challenges mentioned in the sessions included “not enough water,” “development pressure on limited farmland,” and “temperature control.” All these responses were grouped under the challenge theme “dealing with resource changes, restraints, and limitations.” These higher-level themes can more easily inform a reference model FBC relevant to diverse jurisdictions. In exercises where insights come from comparing answers rather than compiling them, analysis was done on individual responses. This was the case with the wineries’ 2045 vision statements, for example. Similarly, for the questionnaire, open responses were compiled, coded, and themed. To allow for honest responses and preserve anonymity in a small group setting, identifying demographic details were not asked of participants. For scaled answers, SurveyMonkey’s analysis function was used to calculate an average response. Due to the sensitive nature of the data and in line with Bannikin policies, anonymity of the responses for the sessions and questionnaire is preserved in the interpretation. This means that in *Results and Discussion*, identifying details are hidden. For example, one vision statement that included a place name was changed to “the region” to be more general. Data collected through the facilitator reflections in both pilots was reviewed, coded, themed, and summarized into recommendations for Bannikin’s next FBST project.

2.2 Integrations with the FBST project

This thesis research happened in parallel to the FBST project. As such, the researcher was able to reflect on the processes simultaneously, informing improved communication and facilitation in both projects. For example, during the FBST project, the researcher interviewed tourism futurists about probable directions for tourism in the next 25 years. Although not directly related to the methodology of this thesis, these conversations provided additional context to the winery pilot through a stronger understanding of the context surrounding the far-future of tourism. Results of both the winery pilot and FBST project will inform the next iteration of the FBST and ultimately, the development of a national-level sustainable business planning program for Canadian tourism businesses/organizations, and an international service stream for Bannikin. A key task of the internship with Bannikin was to develop an FBC reference model for wineries that could be used by the company in its work with tourism businesses. Bannikin is developing FBC reference models for different types of tourism business to be used as inspiring examples in its tourism business planning workshops. The production of the reference FBC model for wineries was informed by many sources. Since exercises in the winery sessions were linked to specific areas of the FBC, including vision/objective, goals, stakeholders, needs, *etc.*, it was possible for data collected during this thesis to inform the development of the FBC reference model. Other data sources included findings from the literature review, resource scan, and results from the broader FBST project, including the interviews with tourism futurists.

To summarize, the methodological approach of this thesis involved a literature review and resource scan to provide contextual background. Next, the project involved testing the FBST tools and process with three wineries. Interventions involved six steps: 1) Initial outreach and participation confirmation, 2) participant pre-work, 3) far-future business planning and visioning session, 4) post-session questionnaire, 5) facilitator reflection exercise, and 6) report back. Since the researcher also participated in the FBST project, these reflections had practical implications for the thesis internship, allowing for real-time adaptations in both projects.

3. RESULTS AND DISCUSSION

The following section shares results from the resource scan and case study interventions, including the far-future business planning and visioning sessions, post-session questionnaires, facilitator reflection exercise, and FBC reference model for wineries. To maximize relevance and applicability of the results for Bannikin, learnings from the FBST project are also considered in this section of the paper.

3.1 Resource Scan Results

The literature review uncovered several resources promoting sustainability in the wine and tourism industries including, as described earlier, reports and websites from the UNWTO, OIV, and the Porto Protocol Foundation, amongst others. However, these resources are not tools to guide sustainable wine tourism business modelling. To better understand the availability of such resources, an online resource scan was undertaken. The results of the scan show that wine tourism managers seeking tools to support sustainable businesses modelling are unlikely to find any designed for the task. The resource scan yielded 14 relevant resources tagged as “wine/agricultural business resource,” “tourism business resource,” “sustainability resource,” or any combination these. No resources received all three tags. For information on the tagging process, see *Methodological Approach*. For detailed scan results, see Table 3.

Table 3: Online scan results for sustainable wine tourism business modelling resources.

Codes	# found
Wine/agricultural business resource	2 (wine), 2 (ag)
Sustainability resource	2
Tourism business resource	-
Wine/agricultural business resource + Sustainability resource	1 (wine), 1 (ag)
Tourism business resource + Sustainability resource	5 (ag)
Wine/agricultural business resource + Tourism business resource	1 (ag)
Wine/agricultural business resource + Tourism business resource + Sustainability resource	-

The scan found courses, programs, certifications, guides, and toolkits, but none were sustainable business planning resources for wine tourism or agritourism. For example, there were checklists for improving sustainability, but no tools to build this into the structure of a business. Similarly, there were business planning tools for wineries, but these focussed on the viticultural and production sides, rather than tourism side of wineries. When considering agritourism resources, more results appeared, including government funded resource kits for farmers. One example of this is the *Guide to Successful Agritourism Enterprises*² made for Vermont farmers that was coded as “tourism business resource” and “wine/agricultural business resource.” Although, the focus was not on *sustainable* business planning, the tool could be combined with other resources, like sustainability checklists, to help a winery manager build a sustainable business plan. However, geographically specific tools like this one have limits, especially when focussed on zoning and permitting processes that vary by municipality. The results of this resource scan show a gap in sustainable business planning

² Guide to Successful Agritourism Enterprises: https://www.uvm.edu/sites/default/files/Vermont-Agritourism-Collaborative/2019_BestPracticesAgritourism-FINALDRAFT-lores.pdf

tools for wineries and other agritourism businesses. That said, there are resources available that could be combined to help achieve this goal, even if there is not a singular resource available for the task.

3.2 Far-Future Business Planning and Visioning Session Results

Results from the far-future business planning and visioning sessions provided insights into how the FBST tools and processes can be adapted to the unique stakeholder needs and characteristics wineries have for developing tourism businesses. Note, in this section, when results are discussed from the “winery perspective,” this is from the point of view of the “winery representatives” who participated in the research.

3.2.1 Context setting (2045)

Following introductions of the participants and the wineries in 2023 and based off the FESDM, initial exercises in the far-future business planning and visioning session were designed by Bannikin and Antony Upward to prime participants for creative thinking, and most importantly to get them collaboratively imagining 2045. This was done by co-developing the 2045 PESTLE (political, economic, social, technological, legal, environmental) context and discussing how the F2B2 Break-Even Goals would then relate to the winery and its stakeholders in 2045. The following 2045 PESTLE table combines feedback from the three wineries. Results from this process are shared in Table 4 below; however, a descriptive version is available in Annex 7. It is important to note that this PESTLE exercise is not intended to be a forecast, it is a collection of ideas about the possible far-future laid out by the wineries. Due to the high interconnectivity of several contextual elements (e.g., political context and legal context), there is at times overlap between the contexts in the table, however, to maintain the integrity of the results these are displayed as laid out by participants.

Table 4: Co-developed 2045 PESTLE, including responses from the three winery cases.

POLITICAL	ECONOMIC	SOCIAL
• Political instability/uncertainty • New regulatory policies	• Bigger income inequality • Shift from international to regional visitors • Labour shortages • More immigration • Nationalism and greater self-sufficiency globally • More collaboration in Europe • Shifts in consumer demand	• Changing population dynamics • Different types of jobs, changing lifestyle priorities • Changing social norms • Changing priorities and related consumer demands • Shocks to social systems

TECHNOLOGICAL	LEGAL	ENVIRONMENTAL
• Huge changes in transportation technology • Externalities and repercussions related to new developments • Increasing gap between traditional and modern wine production methods • Importance of offering wine and wine tourism at different price points	• Nationalistic/protectionist laws • Requirements for greater transparency • New regulations • More support for small businesses • More collaboration and connections between small businesses	• Even greater need to protect biodiversity, farmland • Changing travel patterns • Water shortages impact winery production but advances in technology help save water • Climate change mitigation efforts increase, and businesses make their carbon footprints public

3.2.2 Challenges and opportunities (2045)

Using the 2045 PESTLE and F2B2 Break-Even Goals to frame the conversation, the wineries engaged in an exercise to list potential challenges and opportunities of the far-future. Key challenges the wineries see themselves facing in 2045 centre on three areas: 1) dealing with resource changes, restraints, and limitations, 2) adapting to new visitor behaviours/preferences, and 3) meeting sales targets in a changing environment. When it comes to resources restraints, the wineries discussed the lack of water and development pressures on farmland as potential challenges. They expect to deal with a changing visitor landscape likely to involve two streams of service, one catering to domestic/regional visitors and another aimed at international visitors. With the potential for shocks to the tourism landscape the wineries agreed that a greater focus on the needs of domestic visitors is strategic. One winery also mentioned the importance of encouraging guests to stay longer and spend more. Discussions around navigating new regulatory environments resulting from resource limitations came up several times and was linked to the challenge of growing sales in a context of uncertainty, while facing competition from large companies. In terms of opportunities, the wineries saw that they could use elements of the 2045 tourism context to their advantage by 1) developing points of differentiation and 2) adapting to new visitor behaviours and needs. This could mean being an early adopter of sustainability projects and using this in their marketing, leaning into their roles as an agricultural sanctuary, prioritizing community connections, and fostering repeat customers, especially those who live nearby.

3.2.3 Vision and related goals (2045)

The next exercises, which directly link to areas of the FBC canvas, had participants write 2045 news headlines, develop company “why” statements to illustrate their 2045 visions, and list

related goals. To preserve the integrity and diversity of the answers, the final responses for these two activities are not compiled and are displayed separately in Table 5. Regarding 2045 social goals, several wineries spoke about investing in the local community and building beneficial partnerships. Other social goals included providing quality human connections and building a welcoming, healthy place. Economic goals included long-term profitability and making enough revenue to reinvest it in other projects. In all the sessions there was a general sense of the need for environmental sustainability, as seen in the headlines activity; however, for the goals activity, the only specific environmental goal mentioned was “environmental neutrality.” It is possible that the exercise felt repetitive to the participants, and they chose not to repeat conversations from previous exercises. Goals that crosscut social, economic, and environmental spheres, centered on quality recognition for the winery’s wine and tourism offerings, and goals to be an industry leader and changemaker. When it comes to quality recognition, conversations focussed on lists and awards. In terms of leadership, details included, becoming a training hub, offering internships and learning opportunities for local youth, and teaching visitors about sustainability.

Table 5: Session results by winery, 2045 “why statements” and news headlines

2045 News Headlines #1	2045 News Headlines #2	2045 News Headlines #3
• Production in harmony with nature; management of winery shared across family, connected to the community, using alternative methods.	• Winery awarded as best winery in the region with sustainable tourism 2045.	• 100% sustainable and self-sufficient with no waste in the whole process. • First company to sell entire production via wine tourism, direct to consumer sales.
2045 Company “Why” #1	2045 Company “Why” #2	2045 Company “Why” #3
• To be a steward for heritage and passion.	• To be a leader, set the example.	• To provide a high-quality, authentic experiences that celebrate the region delivered by committed, driven staff who are care to the vision of the company and contribute to sustainable revenue streams.

3.2.4 Stakeholders, needs, and activities

Winery stakeholders listed by participants included staff, the community, visitors/customers, and partners including tourism agencies, chefs-on-demand, and local suppliers. Some stakeholder needs mentioned included staff wanting good jobs, stability, and work-life balance; the local community wanting space to hang out, wine as a celebration of culture, and to know

that their traditions will continue; and visitors wanting good wine, value for money, authentic experiences, and to shop at businesses connected to the local area. To respond to these stakeholders needs, the wineries planned to engage in the following activities: invest in staff wellbeing through trainings *etc.*, create job security/stability by not growing too fast and setting reasonable targets, integrate the community into the business and explore new partnerships, and finally, to be honest, true, and kind to visitors.

3.3 Questionnaire Results

After each session, a questionnaire was shared with participants to understand if and how the case study wineries saw value in the FBST business planning tools and processes and how likely are they to act in response to the intervention. Of the 10 people who participated in the sessions, 8 filled in the questionnaire. Results from the questionnaire along with the facilitator reflections will inform the next iteration of the Bannikin's pilot process. When asked: "Of the exercises you completed today, which did you find to be the most useful, and why?", responses varied, but overall, the most useful aspect of the 2045 business planning and visioning session was getting participants thinking about the far-future and starting conversations between colleagues. In some cases, this session was a rare opportunity for teams to come together and discuss direction. Some respondents noted the difficulty of imagining the world and their business so far into the future. The vision-development exercise and goal setting exercise came up as particularly useful, along with hands-on activities, like developing future newspaper headlines about the business. Moving from abstract thoughts to concrete steps was considered an important part of the process, and several respondents noted they would have wanted more time to create links between their future vision where they can start today. When asked about recommendations to improve the session, suggestions included adding more practical exercises, providing industry-specific best practices, and simplifying language. Another suggestion was to create more touchpoints in between 2023 and 2045. For example, using 2035 as a midway point. Several respondents from one winery suggested elongating the session. Notably, scheduling constraints, meant that that specific workshop was shorter than the other two. When asked: "on a scale from 1-10, with 1 being not likely at all and 10 being extremely likely, how likely are you to act on what you learned today towards the future wellbeing of your business?" the average answer was 7.4.

3.4 Researcher Reflections: Approach to Challenges

Throughout the FBST and the winery pilot, and specifically after the 2045 business planning and visioning sessions, the researcher completed reflection activities. Learnings from this process largely fall into two categories: program design and facilitation strategies.

3.4.1 Program design

Time constraints and scheduling difficulties on the part of the businesses were common, underlining the importance of designing interventions that limit time investments while maximizing benefits to businesses. For example, during the winery pilot, few representatives completed the pre-work. To remedy this, the researcher requested that the final winery send the pre-work in as homework. Doing so meant that the participants were versed with the subject matter in advance and less catch up was needed on the day-of the session. Small time budgets also had implications for the recruitment process, making it essential to articulate the value the business would receive by participating and having honest conversations on time commitments required. Comparing the winery sessions to those in the broader FBST project, cutting the sessions down to half a day helped with recruitment, but compromised what could be accomplished. Most notably it removed the possibility of using a physical FBC and sticky notes which was a highlight of the broader pilot as it offered a tactile activity and a sense of accomplishment. Moreover, the shorter time block meant there was less time for set up and relationship building between the facilitator and the participants, something essential to valuable, interesting, and creative conversations.

3.4.2 Facilitation

Compared to the broader pilot, where sessions took place in third-party locations, the researcher noticed that hosting sessions on-site at the wineries resulted in distractions that interrupted the flow of the sessions. When the entire winery staff participated in the session, there was nobody to handle telephone calls or service drop-in clients, and the researcher noted several interruptions when participants handled such matters. The flow and speed of the sessions also varied depending in part on how comfortable the group was with activity-based work. Thematically, there were several facilitation challenges. Firstly, it was difficult to get participants in the headspace of 2045 and equally difficult to help them stay there. In terms of inspiring thinking, there were variations between the participants as to whether this came naturally. Considerable guidance was required on the part of researcher to help participants imagine an inspiring future. With wineries, it was a particular challenge for participants to separate the agricultural/production and tourism aspects of their businesses in the planning process. Reflecting on the broader FBST project, this difficulty was more pronounced with wineries than other tourism businesses like hotels, for example, who had an easier time separating the accommodation and food-service parts of their business. Another challenge related to facilitation was language as the sessions took place in three countries, with three official languages and an international array of participants, each with their own language preferences. Communication was therefore a team effort, and everyone worked together

3.5 Flourishing Business Canvas Reference Model



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their environments are changing continuously, no plan retains its quality over time” (Ackoff, 1974, p. 8), the reference model will continue to be evolved by Bannikin as new information is collected in the next iteration of the pilot. The reference model was produced using a diversity of inputs and in collaboration with colleagues. To start, the generic tourism business FBCs produced by Bannikin and Antony Upward for the FBST project were used as a base. These generic versions incorporated the interview responses from the far-futurists and Antony’s years of experience developing FBCs. Then, data from this master’s thesis were added, primarily from the literature review and winery sessions. For example, goals were added to the canvas, including “receive recognitions for wine and tourism offerings” and “create opportunities for human exchange and connection” based on the responses collected during the winery sessions. Similarly, from the literature the need for community connections and regional approaches were clear and integrated into the reference model. Recognizing the importance of local context in determining what sustainable tourism can look like (Poitras & Getz, 2006), the reference model is high-level. Specific sustainability initiatives, whether that’s water conservation strategies or community events, must be decided on by individual wineries based on their unique contexts. To contain the scope of the research, the reference FBC only tackles the tourism side of wineries, however, recognizing the importance of systems thinking as laid out across this paper, a recommended action for Bannikin is to develop one or more companion FBCs for the agricultural and production sides of the winery. Note, the grey sticky notes in the model represent complementary aspects of the winery business not covered in the model, for example, related to the agricultural and wine production sides of the winery.

4. CONCLUSIONS

The final chapter of this thesis, *Conclusions*, begins by presenting recommended adaptations for the next FBST pilot. Next, a summary of this thesis project is presented along with recommendations for future research. At the end, research limitations are noted.

4.1 Considerations for the Next Pilot

The findings from this thesis project provide learnings for the next iteration of the FBST project, especially when combined with reflections from the first FBST pilot that took place in parallel. Key considerations for adaptation can be grouped into 1) recognizing time as a limited resource, 2) prioritizing a sustainable far-future, and 3) getting decision-makers in the room.

4.1.1 Recognizing time as a limited resource

Small business owners and staff have a limited time budget available to them and are judicious with how they allocate it. As such, it is important to design pilot interventions to minimize time

commitments while maximizing the benefits businesses receive via participation. Priority activities should include providing space to come together with colleagues, think about the far-future, and explore immediate actions to improve the sustainability of their business. Future iterations of the pilot should use time for creative thinking and action planning. Navigating this time drought on the part of the businesses can take several approaches. It may involve better communicating the value of the pre-work so businesses *choose* to allocate time towards it. In doing so, session time can be used for what participants value most, moving from theory to action with practical exercises to develop concrete steps, while learning from industry best practices. Another adaptation is offering interventions of various lengths with options to split participation across multiple sessions, thereby ensuring the service meets the needs and availability of participants. Regarding recruitment, a recommended adaptation is placing an open call for pilot participants rather than approaching specific businesses to inspire self-identification of the most interested and willing participants. Taking this approach one step further, participation can be set up as a competition that conveys the value of the program. To make the most of the time the businesses dedicate to the program, another adaptation is to host the sessions off-site. In doing so, distraction for participants would be minimized and it would help businesses get more out of the session. Relatedly, it is also important to time the interventions strategically by offering these at quieter times of the year. For example, not working with wineries during harvest. Similarly, offering multiple timing options so businesses can decide what works best may also help. It is also worthwhile to considering what stage of the business planning cycle the firm is in to maximize impacts, meaning not starting the intervention right after the business releases a strategic plan. All things considered, for future sessions, maximizing time in-person is recommended.

4.1.2 Prioritizing a sustainable far-future

From the winery pilot and broader pilot, a tendency to prioritize immediate needs of the business over its far-future sustainability was shown. This behaviour is understandable considering the stress and speed under which many small businesses function. However, it is not a viable approach for creating systematic or strategic change. Without thinking about the far-future and planning for future fitness, the future will be determined by chance rather than purpose. Applying a systems approach to business model design can be undertaken by new and existing firms; however, adapting existing models to ensure they are future-fit is more labour-intensive (Zott and Amit, 2010). To make the program more appealing to established businesses, the next version of the pilot must clearly link far-future goals with goals today, which means spending more time working on the firm's next business models (e.g., 2025, 2035, etc.), not just the far-future model. This way the participants will see how the process

helps them now and in the future. With this change, it is hoped that the businesses will feel better equipped to act based on their learnings. The survey of winery participants showed that there is room to better prepare participants for immediate action. As such, integrating these topics directly into the sessions would be useful. A facilitation challenge in both pilots was moving participants into the headspace of 2045 and inspiring participants to think creatively about new possibilities in 2045. Reinforcing that 2045 is likely to look very different from today could help, as would sharing the positive impacts private business can have on sustainable development through best practices examples. Another approach to inspire creative thinking is to frame the activities more clearly as a challenge for moving to future-fitness rather than towards a desired far-future. If designed properly, this kind of long-term visioning has the potential to work well for wineries, especially family-owned wineries looking to create a legacy for generations to come.

4.1.3 Getting decision-makers in the room

Reflecting on the winery pilot and the FBST pilot, it was difficult to get decision-makers to the table. This challenge was exasperated as the size of the business or organization increased. The larger the staff, the more likely it became the leaders would delegate participation in the business planning and visioning session to someone else. This created a disconnect where participants then needed to convince senior staff of the value in the planning they undertook. In a few instances, Bannikin had follow-up conversations with senior leadership after the sessions to transfer knowledge and organize future interventions. However, to maximize the use of a business' limited time, having leadership participate from the start is essential. Again, small, family-run wineries with a more horizontal management structure are well placed to take advantage of this opportunity if they can set the time aside for the intervention, since the staff are often owners and decision-makers. It is recommended that this participation from leadership is set as a participation requirement for future iterations of the pilot to maximize impacts.

4.3 Looking Ahead

In 2000, Ehrenfeld argued foundationally that sustainability as a state is not achievable because it is immeasurable and presents only an *idea* of a potential future (Ehrenfeld, 2000). The FESDM addresses these concerns with the use of science-based planetary constraints and pushes the goalpost further, to not just sustain, but to design businesses as champions and actors for building a future-fit society where all life can flourish for generations to come. A far-future state is not one that will be met, it is a north star that always lives in the future, providing inspiration, while adapting direction as new information comes in, charting the best

path forward. Sustainability in wine tourism is multi-faceted, with the potential to support sociocultural, environmental, and economic wellbeing at the business- and destination-level. Business planning tools, like those used in the FBST project empower business owners and staff to build sustainability into the structure of their companies. When multiplied across a destination or region, possibilities for positive impact grow. However, at present there are scarce resources available to wine tourism managers looking to contribute to sustainable development and future-fitness. Most resources available provide piecemeal recommendations for downstream action as opposed to structural changes. The tools and methodologies produced during the FBST project fill an important gap. It is hoped that when the recommended adaptations are implemented in the next iteration of the FBST project, this will increase the impact of these interventions, including the likelihood businesses will act on the planning they do in the sessions.

4.3.1 Suggestions for Future Research

In *Theoretical Background*, this master's thesis notes the existence of few frameworks for understanding sustainability in wine tourism and a general gap in research on the topic. From the resource scan, a similar drought on the industry side is also clear. Wine tourism managers have few resources at their disposal to undertake sustainable wine tourism business planning. This thesis looked at the Framework for Strategic Sustainable Development, the Flourishing Enterprise Strategy Design Method, and backcasting methodologies to see how they could be applied to wineries. In a practical sense, the researcher's internship with Bannikin allowed for this to be tested through applying the Flourishing Tourism Strategy for Tourism project's tools and methodologies to wineries in France, Spain, and Portugal.

The main research question for this project was "how can the FBST's business planning tools and processes be adapted for wine tourism businesses?" Through a questionnaire and facilitator reflections, recommended adaptations for the next iteration of the pilot were developed to better meet the unique needs of wineries in business planning. These considerations will also inform a new international service stream for Bannikin, and the national program expected to be launched following the second piloting processes. This master's thesis and the broader FBST project provided inputs for the development of a reference model FBC for wineries. A key learning from the research is the need to produce multiple FBC canvases when working with wineries, to capture their agricultural, production, and tourism sides. It is recommended that Bannikin develop reference canvases for the agricultural and production sides of wineries for use in future sessions.

A suggested future iteration of this research is to use interactive social research methods that provide businesses with science-based models they can interact with to see how the decisions they make today influence the future, thereby giving users an opportunity to create stronger links between the far-future and the present. A similar approach was used by Robinson (2003) in public engagements to explore desired futures for a community using computer games. Recent advancements in artificial intelligence could potentially be leveraged in such a project. Another area for future research is working with businesses to source inputs for their FBCs directly from stakeholders, rather than relying on business perceptions of stakeholder needs. For example, gathering data from visitors, partners, and staff to inform areas of the canvas. This data could also inform a more robust model FBC for wineries.

4.4 Research Limitations

The research associated with this master's thesis has limitations. First, although efforts were made to keep the FBC reference model at a high level to maximize its applicability to different cases, all three case wineries are in Western Europe, so it is possible that the reference model is not entirely appropriate for other contexts, thereby limiting the generalizability of the results. Moreover, the business planning tools and resources tested were adaptations of the FBST processes, not an exact match, potentially limiting the accuracy of the findings. Finally, when it comes to data collection during the winery sessions, it is possible language barriers resulted in miscommunications between the researcher and the participants, in which case some data collected may be incomplete or inaccurate.

For those wanting to go “somewhere other than where the tide is taking [them], the interactive posture is fitting (...) and the best starting place is the design of a desired future, an ideal state [that] specifies what we should plan toward” (Ackoff, 1974 p.7)

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Annex 1 – Flourishing Business Canvas with Guiding Questions



A1

Annex 2 – Future-Fit Business Benchmark Break Even Goals and Positive Pursuits

In a Future-Fit Society...	Break-Even Goals that every business must strive to reach	SDG alignment																		
Energy is renewable and available to all	Energy is from renewable sources	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
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9	10	11	12	13	14	15	16	17												
Water is responsibly sourced and available to all	Water use is environmentally responsible and socially equitable	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
1	2	3	4	5	6	7	8	SDG												
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Natural resources are managed to safeguard communities, animals and ecosystems	Natural resources are managed to respect the welfare of ecosystems, people and animals	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
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The environment is free from pollution	Operational emissions do not harm people or the environment	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
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	Operations emit no greenhouse gases	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
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Products emit no greenhouse gases	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
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	Products do not harm people or the environment	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
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Waste does not exist	Operational waste is eliminated	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
	1	2	3	4	5	6	7	8	SDG											
9	10	11	12	13	14	15	16	17												
	Products can be repurposed	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
1	2	3	4	5	6	7	8	SDG												
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Our physical presence protects the health of ecosystems and communities	Operations do not encroach on ecosystems or communities	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
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People have the capacity and opportunity to lead fulfilling lives	Community health is safeguarded	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
	1	2	3	4	5	6	7	8	SDG											
	9	10	11	12	13	14	15	16	17											
	Employee health is safeguarded	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
	1	2	3	4	5	6	7	8	SDG											
	9	10	11	12	13	14	15	16	17											
	Employees are paid at least a living wage	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
	1	2	3	4	5	6	7	8	SDG											
9	10	11	12	13	14	15	16	17												
Employees are subject to fair employment terms	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Employees are not subject to discrimination	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Employee concerns are actively solicited, impartially judged and transparently addressed	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Product communications are honest, ethical, and promote responsible use	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Product concerns are actively solicited, impartially judged and transparently addressed	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Social norms, global governance and economic growth drive the pursuit of future-fitness	Procurement safeguards the pursuit of futurefitness	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
	1	2	3	4	5	6	7	8	SDG											
	9	10	11	12	13	14	15	16	17											
	Financial assets safeguard the pursuit of futurefitness	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
	1	2	3	4	5	6	7	8	SDG											
9	10	11	12	13	14	15	16	17												
Lobbying and advocacy safeguard the pursuit of future-fitness	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
The right tax is paid in the right place at the right time	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
	Business is conducted ethically	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												

Figure 6: Future Fit Foundation Break-Even Goals (Future-Fit Foundation, 2021).

In a Future-Fit Society...	Positive Pursuits that any business may undertake	SDG alignment																		
Energy is renewable and available to all	Others depend less on nonrenewable energy	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
	1	2	3	4	5	6	7	8	SDG											
9	10	11	12	13	14	15	16	17												
More people have access to energy	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Water is responsibly sourced and available to all	Others contribute less to water stress	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
	1	2	3	4	5	6	7	8	SDG											
9	10	11	12	13	14	15	16	17												
More people have access to clean water	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Natural resources are managed to safeguard communities, animals and ecosystems	Others depend less on inadequately managed natural resources	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
The environment is free from pollution	Others generate fewer greenhouse gas emissions	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
	1	2	3	4	5	6	7	8	SDG											
	9	10	11	12	13	14	15	16	17											
	Greenhouse gases are removed from the atmosphere	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Others generate fewer harmful emissions	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Harmful emissions are removed from the environment	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Waste does not exist	Others generate less waste	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
	1	2	3	4	5	6	7	8	SDG											
9	10	11	12	13	14	15	16	17												
Waste is reclaimed and repurposed	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Our physical presence protects the health of ecosystems and communities	Others cause less ecosystem degradation	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
	1	2	3	4	5	6	7	8	SDG											
	9	10	11	12	13	14	15	16	17											
	Ecosystems are restored	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Others cause less damage to areas of high social or cultural value	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Areas of high social or cultural value are restored	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
People have the capacity and opportunity to lead fulfilling lives	More people are healthy and safe from harm	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
	1	2	3	4	5	6	7	8	SDG											
	9	10	11	12	13	14	15	16	17											
	People’s capabilities are strengthened	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
	1	2	3	4	5	6	7	8	SDG											
9	10	11	12	13	14	15	16	17												
More people have access to economic opportunity	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Individual freedoms are upheld for more people	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Social cohesion is strengthened	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Social norms, global governance and economic growth drive the pursuit of future-fitness	Infrastructure is strengthened in pursuit of future-fitness	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
	1	2	3	4	5	6	7	8	SDG											
	9	10	11	12	13	14	15	16	17											
	Governance is strengthened in pursuit of future-fitness	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Market mechanisms are strengthened in pursuit of future-fitness	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												
Social norms increasingly support the pursuit of future-fitness	<table><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>SDG</td></tr><tr><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr></table>	1	2	3	4	5	6	7	8	SDG	9	10	11	12	13	14	15	16	17	
1	2	3	4	5	6	7	8	SDG												
9	10	11	12	13	14	15	16	17												

Figure 7: Future-Fit Foundation Positive Pursuits (Future-Fit Foundation, 2021).

Annex 3 – Post-Pilot Questionnaire

Question 1:

Of the exercises you completed today, which did you find to be the most useful, and why?

Question 2:

Do you have any recommendations for improving today's workshop? If so, please comment being as specific as possible.

Question 3:

On a scale from 1-10, with 1 being not likely at all and 10 being extremely likely, how likely are you to act on what you learned today towards the future wellbeing of your business?

Question 4:

If there is anything else you would like to comment on with respect to the workshop, please use the comment box below?

Annex 4 – Tourism Trends and Weak Signals

Table 6: Trends and probable directions for tourism

	Negative	Positive
Trends (3-5 years)	• Climate change • Ignoring destination carrying capacity • Mass tourism • Greenwashing • Lack of engagement, excluding locals from tourism development • Resident push-back to tourism • Negative public perceptions of tourism • Culture-washing, commodifying culture • Exclusion of Indigenous peoples from tourism spaces • Denial of Indigenous peoples' land rights • Human capital losses to other industries • Economic disruption and instability • Governments turning inwards • Political instability • Unreliable visitor markets (pandemic, geo-politics, etc.)	• Inclusive, community-driven tourism • Involving communities in development of tourism products and interpretation • Better community-DMO relationships • Seeing humans as part of the ecosystem • Embrace Traditional Ecological Knowledge • Pursuing ecosystem regeneration • Authenticity, truth, and integrity in tourism storytelling and product development • Collaboration and Partnerships • Advocacy to get everyone to the table • Sharing good practices and training • Social innovation • smaller tour operators that give back, with a stake in local resources • Visitor demand for positive impact • Harness digital tech to solve problems • Make tourism a viable career • Legislative frameworks with rewards/ penalties (e.g., plastics bans) • Certification and quality assurance • Baseline sustainability data collection • Canada's brand is highly regarded and aligns with visitor demand
Weak Signals (20-25 years)	• Climate change • Power of large international businesses (focus on profit over people/purpose) • Flight shaming, vilification of tourism • Increased competition for visitors	• More pressure from customers, governments for enterprises to behave responsibly • Rise of alternative tourism, localization, authenticity (demand) • Destinations seeking visitors who align with their values (supply) • Tourism as a tool to reanimate downtowns • Legislative frameworks (rewards/penalties) • Collaboration and resource sharing • Reconciliation efforts continue • Innovation for higher profit margins in tourism • Technology to fight climate change and other challenges

Note: Focus on the Canadian context, compiled from interviews with tourism futurists.

Annex 5 – Sample Slides from Winery Intervention



Purpose and Process	
10:00 – 10:15	Introductions & Background
10:15 – 10:30	What Exists Now?
11:00 – 12:00	2045: Likely & Required
12:00 – 12:15	Break 1
12:15 – 12:45	Our Desired Future
12:45 – 13:30	Far-Future Modelling Part 1
13:30 – 14:00	Planning Our Next Steps



Figure 8: Winery session agenda slide.



Exercise 1:

Introducing Your Business Now

It's 2023. Our business is called _____.

Our top stakeholders include # _____, #2 _____ and #3 _____.

Our stakeholders have different needs.

- #1 wants _____.
- #2 want _____.
- #3 wants _____.



Figure 9: Winery session 2023 introduction activity slide.

Exercise 2: Far-future Contexts (2045) What changes will impact you and your stakeholders?					
Political	Economic	Social	Technological	Legal	Environmental

Figure 10: Winery session PESTLE activity slide.

Exercise 5: Why does your winery exist?

It's 2045...why does your winery exist? What is our purpose/why/vision statement?

- ???



Figure 11: Winery session "why statement" development activity slide.

Annex 6 - Facilitator Reflection Template

General

- Overall, how did participants engage with/complete the pre-work? (Were there any exercises they had questions about?)

Participant perspectives and engagement

- What was the level of energy among participants across the session?
- Did the participants seem engaged? When and why? (*i.e.*, were there particular activities that really engaged participants, which ones less so?)
- Were parts of the session confusing for participants? (*e.g.*, exercises that required additional explanation?)
- What sentiment was shared toward the content?

Facilitators' perspectives and experience

- How was the time allocation and flow of the session?
- Were the right/needed people present in the room and were they able to engage with the materials as needed?
- Was the distribution of material and facilitation within the team spread out efficiently?
- How much support did we need to provide each other as facilitators?
- What could we have done differently to get better results for the pilot and beyond?

Annex 7 – Detailed PESTLE Results

Table 7: Detailed PESTLE activity results for winery session

POLITICAL • Political instability/ uncertainty (e.g., war, extreme political movements, shifts in the political climate) • New regulatory policies (e.g., minimum requirements for ethical/organic business practices, labeling requirements, lighter wine containers, etc.)	ECONOMIC • Bigger income inequality, making tourism even more of a privilege. • Shift from international to regional visitors • Labour shortages • More immigration required to fill gaps. • Nationalism and greater self-sufficiency globally • More collaboration within Europe • Shifts in consumer demand (e.g., for low alcohol and organic products)	SOCIAL • Changing population dynamics (e.g., declining and ageing populations) • Different types of jobs, changing lifestyle priorities (e.g., wanting more freedom, changing priorities, automation of certain jobs in tourism and agriculture) • Changing social norms (e.g., alcohol consumption is reduced, people drinking less but better-quality wine) • Changing priorities and related consumer demands (e.g., looking for more human connection, which may sometimes be delivered virtually, environmental stewardship, demand for local/regional travel and tourism options, increased demand for local wine) • Shocks to social systems (e.g., because of pollution, pandemics, etc.)
TECHNOLOGICAL • Huge changes in transportation technology (e.g., shift to electric vehicles complete for cars, bicycles, tractors, planes with a well-developed charging network, transportation faster and easier, people have tinier cars, new methods for transporting purchased wines, autonomous tractors mean task automation) • Externalities/repercussions related to new developments (e.g., waste from batteries etc.) • Increasing gap between traditional/modern wine production methods • Importance of offering wine/ tourism at different prices	LEGAL • Nationalistic/ protectionist laws • Requirements for greater transparency (e.g., nutritional information, warnings on wine labels) • New regulations (e.g., around maximum permitted alcohol volumes, limiting the use of certain resources like water usage, carbon emissions maximums, etc.) • More support for small businesses • More collaboration and connections between small businesses	ENVIRONMENTAL • Even greater need to protect biodiversity, farmland (especially close to urban areas) • Changing travel patterns (e.g., Climate change makes for hotter summers and shifts when people travel) • Water shortages impact winery production but advances in technology help save water • Climate change mitigation efforts increase, and businesses make their carbon footprints public (e.g., containers for wine changed away from glass to reduce weight)