

### DRIVERS OF CHANGING CONSUMER LIFESTYLES

Demographic Change	Economic Change	Technological Change	Global Climate Change
The proportion of the world population of the world aged 55+ years will grow from 17% of the total population now to 22% in 2030.	The developing world is accounting for an ever larger share of global GDP, in what is being termed a rebalancing of global power.	New technologies such as Wearables and Biometrics, Augmented and Virtual Reality, Beacons and Location-based services, Cashless Payments, Real-time language translation, and Drones will have a great impact on travel over the coming decades.	The average temperature is projected to be 3°C to 6°C higher by the end of the century

THE DEATH OF RISK

**Cruise control**

57% agree "I try to appear in control of my life at all times".

**Mobile control**

57% manage their personal life using notes, alerts, reminders, calendars, etc., on their smartphones at least once a week.

**THE END OF ADVENTURE**

New behaviours around tracking and planning are changing the way in which attitudes about risk and reward are formulated and driving a rise in risk-aversion

**Last Minute Living**

22% agree "I often find myself cancelling plans at the last minute"

**Surprise Me!**

55% would be interested in a service that detected their location and suggested interesting things to spontaneously see and do in the nearby area.

ADVENTURE RELOADED

THE LEISURE UPGRADE

**Cult of Creativity**

61% who take photos on their smartphone 1-3 times a week or more.

**Dark Tourism**

47% agree "I am interested in visiting sites associated with historical tragedies while on holiday".

**Liquid Skills**

52% who describe learning a new skill or activity as valuable to their overall entertainment.

**CONSTRUCTIVE TOURISM**

Consumers around the world are increasingly redefining constructive behaviours as genuine enjoyment. We assess six trends spread across two main themes that show how this is developing.

**Everyday Athlete**

65% agree "Keeping physically fit and active is important to my identity".

**Great Minds**

58% who have practiced mindfulness or meditation or are interested in doing so.

WORLD WIDE WELLNESS

PERFORMATIVE LEISURE

**Consumer Capital**

47% who would give permission to companies to use their data to get special offers or discounts.

**Timehopping**

33% who use social networks to keep a record of the most important moments in their life.

**SOCIAL LIVING**

Consumers today socialise online and look to friends, family and contacts to provide unbiased recommendations and advice. We assess three key social trends in two categories

**Connected Communities**

40% who have used or are interested in a peer-to-peer household item lending service or a rideshare carpooling service.

PEER POWER

DEPOP!

**Cashless Society**

38% agree "I would like to be able to pay for things online with just one click".

**PERSONALITY WITHOUT PEOPLE**

The consumer appetite for online remote services or in-person automation is warming – but slowly. We still see an underlying need for emotional understanding and security alongside the growing need for efficiency and immediacy based around three trends in two areas.

**Emojinal Intelligence**

43% agree "Companies should acknowledge positive comments/posts that people make about them on social networking sites.

**Conversational Commerce**

24% who say that instant messaging and socialising face to face are important to their overall entertainment.

COMPUTERES LEARN HUMAN

**The Power of Quiet**

69% agree "I make sure I regularly have some time with no commitments/ nothing specific to do, e.g. no work or social commitments".

**NO ESCAPE**

The consumer desire for a "digital detox" will undergo profound change over the coming decades. With strong ties to health and wellbeing but serious challenges to control, we explore underlying needs.

**Casual Connectivity**

41% agree "I would like to be able to better control when I receive notifications on my mobile phone".