LIFESTYLE TRENDS & TOURISM
HOW CHANGING CONSUMER BEHAVIOUR IMPACTS TRAVEL TO EUROPE
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LIFESTYLE TRENDS & TOURISM

HOW CHANGING CONSUMER BEHAVIOUR IMPACTS TRAVEL TO EUROPE


THE END OF ADVENTURE?

CONSTRUCTIVE TOURISM

SOCIAL LIVING

PERSONALITY WITHOUT PEOPLE

NO ESCAPE

Brussels, May 2016
In today’s volatile economic climate, changing consumer behaviours have an increasing impact on global commerce. The speed of consumer change, the blurring of traditional demographic boundaries, the growing power of the consumer through technology and the nature of globalisation are making trend determination and their adequate exploitation essential for success. This is particularly important in the tourism sector, where the traveller’s selection of goods and services is instrumental for living an experience. Shifts in consumers’ travel attitudes and behaviour in terms of experiences sought and responses to marketing messages will ultimately impact their travel product and destination choices.

The European Travel Commission (ETC) has a long history of gathering intelligence on Europe’s key overseas travel markets. However, travellers’ choices are changing rapidly. Acknowledging the need to capitalise on long-term behavioural and attitudinal consumer lifestyle trends, ETC commissioned Future Foundation to gather new and meaningful insights on opportunities in long-haul markets suitable for action in the European tourism sector.

This report aims to provide meaningful information to ETC members, the 32 National Tourism Organisations of Europe, and contributes to better adapting to consumer needs in long-haul markets. Results are also meant to feed into ETC’s promotion of the VisitEurope.com portal and its long-term strategy ‘Destination Europe 2020’.

Dr. Peter De Wilde
President
European Travel Commission
Consumers around the world are changing rapidly, in all kinds of ways, and the ways in which marketers attempt to communicate with them is having to change to keep up. They are, for example, becoming more and more demanding of the products and services they buy, more and more tech-enabled and more time pressured. They have less and less time in which to make decisions but higher and higher expectations that those decisions will prove to have been the right ones.

The moments when consumers have the time or inclination to engage with advertising are evolving. No longer do they only take in the home but, instead, can take place anytime or anywhere where there is a decent internet connection, placing ever greater pressure on marketers to ensure that their message is neither skipped altogether nor disregarded.

Additionally, the tools via which consumers engage with advertising and their expectations of what advertising can do for them, are placing more and more pressure on marketers to come up with innovative ways to get their messages across and an ever-increasing need to focus marketing content on the specific needs and interests of the individual, instead of marketing to segments or mass populations.

As is the case for marketers across all product sectors, national tourism organisations (NTOs) face significant challenges to their activities. NTOs within Europe have signalled their commitment to, first, understanding, and secondly, to responding to these consumer changes with new tools, messages and usage of new channels.

**Constructive Tourism** is the second of five Consumer Lifestyle Trends which together form the core of the *Lifestyle Trends & Tourism Report* – a comprehensive research project that provides a future-facing summary of the most important consumer changes impacting travel to Europe, particularly from the key markets of China, Brazil, the USA and Canada. The full report has been produced following a detailed programme of both primary and secondary research; further details of the research methodology are included in the Appendix.

Whilst the report is intended to form one cohesive body of work – including an opening chapter on contextual drivers – each individual Trend Chapter offers its own data analysis, qualitative research, case studies of how changes are being leveraged within the travel industry, and recommendations for how NTOs and destination marketers should respond.

Here, **Constructive Tourism** is presented on its own. In this chapter, we explore emerging mentalities and behaviours which are seeing tourists from around the globe attempt to integrate self-improvement into their travels – from learning new things abroad to improving their health and wellbeing.

Please note that page and heading numbers have been preserved to reflect this chapter’s original place in the full report.
3. CONSTRUCTIVE TOURISM

Given the tightly-laced control we see consumers taking on over their lives – even when on holiday – how will they balance this to avoid leisure-less lives? Are there still avenues for enjoyment, if hedonistic behaviour is no longer in vogue?

We look to see how new trends are emerging around self-improvement as a response – stemming from both a negative perception of self-fulfilment that seems to have taken over consumers around the world, but also a resounding attitude which increasingly codes constructive behaviours as genuine enjoyment. We assess five trends spread across those two areas with knock-on impact for leisure and travel:

3.1 The Leisure Upgrade, which explains how consumers are beginning to imbue their downtime with constructive activity and meaning – both to upgrade the leisure activity itself, as well as the person undertaking it:

3.1.i Cult of Creativity, which explores how attitudes towards creativity are becoming increasingly positive – as well as how behaviours are beginning to follow, with the so-called “democratisation” of creative hobbies such as photography and cooking.

3.1.ii Liquid Skills, which explores budding attitudes that have emerged from the 21st century workforce around constantly upskilling, acquiring new knowledge, and simply the idea that being able to learn itself is a skill that ought to be nurtured.

3.1.iii Dark Tourism, which explores the next level to authenticity-seeking – where consumers, particularly from the USA and Canada, are beginning to seek more well-rounded views of the places they travel.

3.2 World Wide Wellness, which explores how the concept of “wellbeing” has sprung into mainstream consciousness in the last few years – as well as how this will only continue. We explore new views of wellness that see mental and emotional wellbeing as inseparable from physical, but which are still complicated by global pressures towards appearance and beauty – and which all are housed under the same ultimate need for self-improvement:

3.2.i The Everyday Athlete, which looks at the growth of athleticism into a mainstream aspiration, rather than a niche hobby – and what consumers are doing to pursue it.

3.2.ii Great Minds, which shows how the global interest in mindfulness has spread to a resounding mentality that seeks to improve mental balance – often for holistic health, but also for improved efficiency or better emotional management as well.
3.1 THE LEISURE UPGRADE

Optimisation and control have made their way into the world of leisure beyond the planning stage and into leisure pursuits themselves – and particularly with the integration of self-improvement into entertainment. Whilst traditionally these factors may have been at odds, today they increasingly go hand-in-hand.

“How strongly do you agree or disagree with the following statements? I do not feel as though I am reaching my full potential in life” | 2015

Underlying this may be the widespread sense of discontent or lack of fulfillment; looking across the globe, we see that just over 1 in 2 agree or agree strongly that they do not feel as though they are “reaching full potential in life”. It is a very small proportion that actively disagree to this statement, averaging less than 1 in 5. And whilst this is certainly an expression of cultural aspiration, rather than widespread individual pain and true discontent, it is striking that a negative statement reflects such strong agreement nonetheless.

On top of this, we find that typical demographic indicators do not reflect as strong a difference as could be expected. There is certainly an age-related factor at play: unsurprisingly, younger consumers are more likely to agree, with 63% of Millennials either agreeing or strongly agreeing. However, it is still a majority that agree amongst Gen X, with 55% agreeing – and whilst it is a minority of 45% Baby-boomers who do the same, we see that the majority of those who disagree are aged 55+.

This attitude is far from dormant, however. We find that it manifests in goals and behaviours across the board; and broadly, we see that agreement to this statement is strongly correlated to the statement on control seen in the previous section – showing that the link between wanting to constantly appear in control is certainly related in some way to this widespread lack of fulfilment.

“"I've never taken a trip that involves self-improvement, but I probably should.”

FEMALE, 26, USA
It’s unsurprising that those who feel as though they’re not fulfilling their full potential are far more likely to be control-conscious. Globally, this represents a 15 percentage point discrepancy.

Brazil is particularly notable – given that there is a lower proportion of those who feel unfulfilled overall, it is particularly significant that 83% of the unfulfilled group try to appear in control of their lives at all times.

The Leisure Upgrade describes how this mentality will affect future leisure demands. We anticipate that the travel industry will be strongly affected by the consumer need for self-improvement and further life fulfilment – a link which is already exposed today when we examine those who have future travel plans.

An average of 2 in 3 globally who expect to take a long-haul ‘dream’ holiday or world trip in future – rising as high as 86% in Brazil and 75% in China, and as low as 50% in Canada and the USA. Amongst these, we see that the proportion of those who feel lack of fulfilment of their potential grows slightly. This shows that future travellers – rather than being a population of those who are confident in how much they are making out of life – are actually more susceptible to fulfillment insecurity.

“More people travel with other purposes than just a holiday, such as shopping, health and medical reasons, sports and activities, education or life events such as weddings and anniversary ceremonies. ... International travel has becoming part of Chinese life and the way in which they travel has changed over time: from just coming out to see the world [before] to travel with more purpose [today].”

XIAOLEI, SHANGHAI

“More people are travelling and trying new things instead of just ‘relaxing’ on vacation.”

SAHRISH, TORONTO

Do you expect to do any of the following in the future, either for the first time or again? Take a long-haul ‘dream’ holiday or world/multi-destination trip

% of those who say ‘yes’ who feel unfulfilled and fulfilled | 2015

Source: nVision Research | Base: Global average (1000-5000 online respondents per country) aged 16-64, 2015 February

GLOBAL AVERAGE

Expectant long-haul travellers – Fulfilled Potential
Expectant long-haul travellers – Unfulfilled Potential
Do not expect to travel long-haul in future

Expectant long-haul travellers – Fulfilled Potential
Expectant long-haul travellers – Unfulfilled Potential
Do not expect to travel long-haul in future

Source: nVision Research | Base: Global average (1000-5000 online respondents per country) aged 16-64, 2015 February

REGIONAL DIFFERENTIATION

Within this group of expectant long-haul travellers, we can see that the majority do not feel as though they are fulfilling their full potential in life. The proportion who feel unfulfilled is slightly higher amongst those who plan to travel than it is amongst those who do not – this is reflected consistently across all markets.

This indicates that those who travel are at least as likely – if not slightly more – to be open to combining self-improvement and travel.
More, we see that those who do not feel they are reaching their full potential genuinely value self-improvement activities as genuine entertainment; this is the core of The Leisure Upgrade.

“[Millennials] love to travel, but not just for leisure. They prioritize adventure, learning about the world and discovering new places.”

SAHRISH, TORONTO  FEMALE, 64, USA

Interestingly, the unfulfilled group are more likely to rate all activities as higher in value on the 1-10 scale than their more fulfilled counterparts – however, the relative ranking of most valued entertainment activities within each group does shift as well:

**GLOBAL TOP 10 EXTREMELY VALUED ENTERTAINMENT ACTIVITIES**

“How valuable are each of the following to you in terms of your overall entertainment? On a scale of 1 (Not at all valuable) to 10 (Extremely valuable)” | % of global average who rank each 10, ordered from highest % to lowest | 2015

<table>
<thead>
<tr>
<th>FEEL THEY ARE REACHING THEIR FULL POTENTIAL</th>
<th>DO NOT FEEL THEY ARE REACHING THEIR FULL POTENTIAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Just relaxing</td>
<td>1. Just relaxing</td>
</tr>
<tr>
<td>2. Reading for pleasure</td>
<td>2. Travelling to countries I have never been to before</td>
</tr>
<tr>
<td>3. Socialising face to face</td>
<td>3. Reading for pleasure</td>
</tr>
<tr>
<td>4. Travelling to countries I have never been to before</td>
<td>4. Socialising face to face</td>
</tr>
<tr>
<td>5. Keeping up with news and current affairs</td>
<td>5. Keeping up with news and current affairs</td>
</tr>
<tr>
<td>6. Participating in sport or going to the gym</td>
<td>6. Learning a new skill/activity</td>
</tr>
<tr>
<td>7. Learning a new skill/activity</td>
<td>7. Socialising chatting with friends and family using instant messaging</td>
</tr>
<tr>
<td>8. Socialising/chatting with friends and family using instant messaging</td>
<td>8. Participating in sport or going to the gym</td>
</tr>
<tr>
<td>9. Entertaining at home/cooking (not everyday cooking)</td>
<td>9. Entertaining at home/cooking (not everyday cooking)</td>
</tr>
<tr>
<td>10. Watching TV</td>
<td>10. Making art/photography/crafts/music</td>
</tr>
</tbody>
</table>

Source: nVision Research | Base: All smartphone owners among 1000-5000 online respondents per country aged 16-64 (Indonesia & S. Africa 16-54), 2014 February

Learning a new skill/activity rises one place – it rises above sport and exercise, despite the unfulfilled group having a slightly younger demographic skew – and making art of any kind rises into the Top 10 for this group, having not made the cut for those who are secure in their life fulfilment.

And of course, travelling to new countries makes the biggest jump up the tables – rising from the fourth most-valued entertainment activity to the second. As we have seen in The End of Adventure, travel to new countries is strongly associated with meaning and authenticity; this group of self-improvers will see travel as a world-expanding, even self-challenging opportunity.

In the following sections, we explore further how The Leisure Upgrade is manifesting in these areas of creative pursuit, upskilling, and the ongoing search for meaningful experience – particularly in travel, and all driven by an underlying drive for constant self improvement.
3.1.1 CULT OF CREATIVITY

This trend briefly explores the prevalence of creative pursuit – much of it driven by the democratisation of art-based leisure pursuits such as photography. Here, we seek to tie the link between those who travel and those who enjoy creative arts – or at least those who aspire to integrating creativity into their arsenal of hobbies.

“How valuable are each of the following to you in terms of your overall entertainment? On a scale of 1 (Not at all valuable) to 10 (Extremely valuable): Making art/photography/crafts/music” % who rank it at each 1-10 value, 2015

Across the board, around half of respondents rate creative leisure pursuits as 6-10. There are some differences between markets, but largely, it is certainly a popular hobby.

Tying it to travel, however, reveals interesting differences; amongst those who highly value travel as entertainment, there is clearly a higher proportion of those who highly rate creative pursuit. Although there are higher volumes of those who rate travel highly in China and Brazil compared to Canada and the USA, we can see that the same pattern arises between high travel-valuers and low travel-valuers: those who value travel highly are much more likely to rate creative arts highly, whilst those who value travel lower are much more likely to rate creative arts lower.

“"How valuable are each of the following to you in terms of your overall entertainment? On a scale of 1 (Not at all valuable) to 10 (Extremely valuable): Making art/photography/crafts/music” % who rate this 6-10 (Creatives) and less (Non-Creatives) | Amongst those who rate travelling to new countries 6-10 (High value in travel) and less (Low value in travel) | 2015

Source: nVision Research | Base: 1000-5000 online respondents per country aged 16-64 (Indonesia & S. Africa 16-54), 2015 February

Regional Differentiation

Creative hobbies are popular worldwide; very few have never pursued this as entertainment.

Their value is felt particularly strongly in Brazil and China in comparison to Canada, the USA and Europe. This may speak to how creative pursuits are quickly becoming high-socio currency activities in markets that are seeing significant middle class expansion; however, it could also simply be due to cultural differences in widespread prevalence of artistic pursuit in people’s everyday lives.
REGIONAL DIFFERENTIATION

If one owns a smartphone, they almost certainly use it as a camera. We see this across the world, with very marginal figures having never done so.

And if one takes photos with a smartphone, they are very likely to do so on a weekly basis or more: it is truly a global habit.

It is unsurprising that China and Brazil see the highest proportion of mobile photographers. Canada shows the lowest uptake — but even then, 2 in 5 take photos at least weekly.

CASE STUDY: VAWAA | Vacation with an Artist

Vawaa is a network of artists around the world who offer travellers multi-day all-inclusive studio experiences by inviting them into their own homes and studios.

Rather than simply being art lessons abroad, the listed artists promise an entire experience of self-discovery and cultural exchange. All artists share a specific art form which has some manner of origin in their country’s culture, such as Marie Stará’s dressmaking studio which combines modern designs with Czech folkloric prints. Some of them offer spiritual experiences, such as Alper Ackay’s “Anatolian Sacred Movements and Healing” in Istanbul (pictured above) — an invitation to learn contemporary interpretative dance that is rooted in old Turkish ritual.

NOTEWORTHY STRATEGY?

The founder, Geetika Agrawl has personally hand selected each artist which travellers can visit. This has meant that the quality of each individual’s experience, when learning a new art form, is kept at a high level. VAWAA communicate information about each individual taking the course, so both sides can receive the maximum benefit from the time spent together, with each group being tailored towards specific levels of creativity, skill and knowledge and including no more than 3 people at a time.

This small, personal experience is what makes VAWAA stand out to tourists craving artistic experiences.

“I am a designer and an avid traveller. During my travels, I like to immerse myself into the local culture, make things with my hands, and get inspired by learning something new. I noted that there were others like me expecting the same from their travels, but there was no easy way to find local artists and designers in cities they would visit. Thus the idea of ‘Vacation With An Artist’ was born.”

GEETIKA AGRAWAL, FOUNDER, VAWAA (POSTING ONLINE, 2015)

But for more intuitive evidence, we need to look no further than perhaps the most common sideline activity in travel: photography. Looking at sheer volume, we see that majorities take photos on a smartphone at frequency:

“How often do you do the following activities on your smartphone, either through a web browser or an app?” | Take photos | 2015

<table>
<thead>
<tr>
<th>Does not own a smartphone</th>
<th>Never</th>
<th>Less than once a week</th>
<th>1-3 times a week</th>
<th>Nearly every day or more</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global average</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>European average</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brazil</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>China</td>
<td></td>
<td></td>
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<tr>
<td>Canada</td>
<td></td>
<td></td>
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<tr>
<td>USA</td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Source: nVision Research | Base: 1000-5000 online respondents per country aged 16-64 (Indonesia & S. Africa 16-54), 2015 February
When we look at demographic differences, we see that there is a significant tail-off in the older generation; this is in accordance with smartphone ownership as well as natural differences in habit. Significantly, however, the proportion of millennials who take photos with a smartphone is largely consistent between markets:

"How often do you do the following activities on your smartphone, either through a web browser or an app?"

<table>
<thead>
<tr>
<th>Take photos</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Millennials</td>
<td>100%</td>
</tr>
<tr>
<td>Gen X</td>
<td>80%</td>
</tr>
<tr>
<td>Baby-Boomers</td>
<td>60%</td>
</tr>
<tr>
<td>Global average</td>
<td>40%</td>
</tr>
<tr>
<td>European average</td>
<td>20%</td>
</tr>
<tr>
<td>Brazil</td>
<td>0%</td>
</tr>
<tr>
<td>China</td>
<td>0%</td>
</tr>
<tr>
<td>Canada</td>
<td>0%</td>
</tr>
<tr>
<td>USA</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: nVision Research | Base: 1000-5000 online respondents per country aged 16-64 (Indonesia & S. Africa 16-54), 2015 February

The key here, however, is recognising that travel photography is evolving. It’s certainly true that part of travel photography comes from the ongoing need to document our lives – particularly significant happenings, such as vacations – but increasingly today, with high-quality cameras now built into every smartphone as standard, we can see that the barrier to entering the world of photography rather than documentation has gotten extremely low. Acknowledging that this self-selecting group of travellers are also more likely to have creative hobbies in the first place, it’s most likely fair to say that the constant photo-op-seeking from tourists around the world is not just context-dependent – it is truly a hobby of its own right.

And if we take into account the various tools consumers now have to make their photos even better through editing – or simply to even alter photos with their own creative touch, as with filtering – we see that the sprawling world of Instagram and beyond has truly shaped a market of mainstream amateur photographers.

Particularly for the two markets where smartphone photography is the most habit-native – Brazil and China – it will be increasingly valuable to recognise this as the creative expression it is. The constant photo-taking that tourists so often are ridiculed for ought to be treated as a more serious pursuit, and as a genuine source of enjoyment that can be interacted with.

**IMPLICATIONS: IN-DESTINATION**

The widespread success of Snapchat’s infamous geostamp filters already attest to how location and photo-editing link in a social media context. There could be room to offer photo-obsessed travellers regional filters – perhaps made available via a tourist organisation app – exclusively available to their location, to add an element of individuality and creativity to their experience.

The recent resurgence of poloroid-style photos – those which print instantaneously – could also indicate appetite in this area as well. Of course, versions of this are already common, particularly at tourist hotspots – from rollercoaster drop snaps at theme parks to men with tripods eagerly awaiting subjects around the Eiffel Tower – but currently, they lack a distinct creative flair. Innovation in quality and originality around this area could be extremely popular.

Meanwhile, the underlying theme of self-improvement is still pervasive here. As will be seen in the following section (as well as with the case study above), there are clear opportunities as well to help travellers hone their creative skills whilst travelling.
3.1.ii LIQUID SKILLS

The out-of-home leisure industry has been dominated by consumer enthusiasm for the leisure lesson for some time – from cookery classes to hot yoga, rock-climbing and beyond. This exploding industry appeals to huge swathes of consumers by having the same answer to disparate motivations: true love of learning, the need for new experiences, budding health concerns, pressure in the workforce to upskill, or even wanting to have more interesting hobbies to show off online.

And as we saw previously, “learning a new skill/activity” is an extremely highly-valued pursuit as entertainment – not just for its functional value.

“How valuable are each of the following to you in terms of your overall entertainment? On a scale of 1 (Not at all valuable) to 10 (Extremely valuable): Learning a new skill/activity” | % who rank it at each 1-10 value, 2015

Source: nVision Research | Base: 1000-5000 online respondents per country aged 16-64 (Indonesia & S. Africa 16-54), 2015 February

We see that learning new skills is extremely valuable in Brazil and China in particular. In China, where there is a long-standing culture that prioritises learning as self-development across socio-economic class and age groups, there could potentially be a strong opportunity. Brazilian travellers are also seen through our qualitative research to be extremely maximising – particularly as travel to Europe is so costly – and meanwhile respond very positively to the prospect of leisure learning.

“[Liquid Skills] already exists in many Chinese consumers’ weekend activities, especially those people with children. But I think [this] will still increase over the coming 5-10 years.”

XIAOLEI, SHANGHAI

“Brazilian travellers themselves have access to a growing number of travel agencies offering their clients the possibility of a vacation time combined with light studies. There’s also this school abroad called EF Education First which works as a travel agency and offers art-related courses (painting, photography, fashion and such) in their schools abroad as a way to attract tourists interested in getting more from their vacation time.”

TIAGO, SAO PAOLO

REGIONAL DIFFERENTIATION

Skills acquisition is valued highly across the world as entertainment – but no where more so than China. Arguably less of a trend than a long-standing staple of Eastern culture, this activity was not rated 1 of 10 by a single respondent; meanwhile, of those who rate it 6 or above, a quarter of them have given it the maximum value score of 10.

And whilst a full quarter of Chinese Millennials are rating this 10 out of 10, 15% of Chinese Baby-boomers are doing the same – which, for perspective, not only surpasses the global average Baby-boomer proportion (8%), but even the global average Millennial proportion (14%) as well.
“Thousand Lake Island has its natural beauty and no other lake can compare, but I believe the nowadays people wants more than just seeing the lake. We are building a horse racing park to allow people to learn a skill while spending time on the beautiful site... People come with a constructive purpose and go home with a better self.”

MALE, 50S, PROJECT DEVELOPER OF THOUSAND LAKE ISLAND, CHINA

“Travel has always been seen as an escape from the gruelling American work life and I think this still prevails, but perhaps the growth of the fun work culture changes the way people perceive their time off.”

ANNABELLE, NYC

“Those who take work on vacation with them probably travel more because they never really take vacation. Working remotely allows some to travel the world while dialing in every day from their office’s 9am-5pm.”

KELLY, SAN FRANCISCO

“Travelling for work is still on the rise. Schools travelling on field trips abroad are still relevant. Students studying abroad is also an increasing and popular trend.”

TRAVEL AGENT, CANADA

“I love to travel to get away from work, but sometimes, work ends up following me there!”

MALE, 45, CANADA

From the USA and Canada, we see that evolving workplace pressures and requirements could be driving Liquid Skills as well. As work-life separation thins in these markets, we see that consumers are eager to pursue career advancement as part of identity fulfillment. From qualitative research, we can see that work is certainly joining many travellers on their holidays from these markets; meanwhile, shifting perceptions of the role of work in identity means that work and play are no longer mutually exclusive.

IMPLICATIONS: INSPIRATION & DISCOVERY

Particularly when it comes to marketing campaigns, travel tends to align itself within leisure-relevant spaces to access consumers – or to emphasise leisure and relaxation when it does appear in work-relevant spaces such as on commuter trains. However, increasingly, there may be opportunity to position future campaigns as career-friendly; if currently, sunny beach getaway billboards sit next to local evening course advertisements on the train, there is no reason why a combination of the two couldn’t be effective in tapping into this market.

But as with creativity, we see that those who travel are again naturally inclined to rate learning new skills as more important to their entertainment. Here, the proportional differences are even more staggering; with the exception of China, which we already know to be a market which highly values skills acquisition as entertainment, we see extremely strong disparities between those who value travel more and those who value travel less. Particularly in the USA and Canada – the markets that have the most statistically even samples of low travel-valuers and high travel-valuers in the first place – we see extremely significant differences in attitudes towards leisure learning.

“There are many new courses [that interest me] that are designed for teaching skills and provoking the creativity: how to make jewellery, arts/crafts, knitting, etc.”

FEMALE, 37, BRAZIL
"I think it’s inevitable that if you take up a new activity and you enjoy it, you want to improve at it. I have a friend who started African dancing lessons and is sticking it, going weekly, and looking to learn other aspects about the culture around it, so it’s more than just a physical activity for her."

MALE, 27, BRAZIL

"[The trend is active] within the US travel sector... Rather than being content with the usual tourist spots, the US travel market understands that people want to go that little bit further and see destinations 'like a local', learning new things any maybe even picking up new skills."

ANNABELLE, NYC

"Tour companies have activities set up based around those niche market trends. Current touring aspects give you a mix of both leisure and constructive tourism. In Vietnam, many packages offer traditional cooking classes and visits to local villages to see how they produced traditional clothing."

TRAVEL AGENT, CANADA

"When people vacation, they don’t have inhibitions, so they love to do things they wouldn’t normally do at home. This could be something fun like learning to rock climbing or even something adventurous like exploring and learning about ancient civilizations."

SAHRISH, TORONTO

Normally, people will simply avoid choosing those places they are not interested in [as travel destinations]. But [more and more] they pick a place where they can learn or upgrade a specific skill.

CARRIE, SHANGHAI
**IMPLICATIONS: IN-DESTINATION**

Proposition development here may not need rethinking so much as repackaging, given the wealth of museums, education institutes, and high-level tours alike, Europe has plenty of pre-existing opportunities that could be reimagined using skills-acquisition language to add a sense of novelty, value or local authenticity.

The key is to emphasise skills rather than simply knowledge. Sometimes, it will be about building propositions that offer the chance to learn genuinely actionable skills – but other times, it may simply being about reminding the latent market of leisure learners of the individual personal development they stand to gain. Travellers who respond less effectively to invitations to learn about local history could respond far more positively to invitations to broaden their horizons, deepen their understanding, or add sophistication and worldliness to their identity.

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**CASE STUDY: Ritz-Carlton “Do Good Feel Good”**

Ritz-Carlton in Washington DC offered guests the rewarding opportunity to take part in their Do Good Feel Good scheme, in collaboration with the “community kitchen” DC Central Kitchen.

The DC Central Kitchen provides meals for low income and at risk neighbours, using recycled foods; it acts as a hub providing meals for nearby homeless shelters, non-profit organisations and transitional homes. Guests who participate in the initiative, receive a behind the scenes tour of the kitchens operations, with opportunities to volunteer afterwards. Reservation to volunteer normally must be reserved months in advance.

The package includes an elegant room for a night, breakfast for two in the hotel’s restaurant, transport to and from DC Central Kitchen and access to the luxury sports club. A donation was also made in the guests name from Ritz-Carlton to the kitchen.

**NOTEWORTHY STRATEGY?**

The opportunity to volunteer and give back to the community, whilst travelling, is a unique chance to learn. Here we see a brand cleverly identify what is at the core of the leisure learning trend for many – wanting meaningful experience – and taking the opportunity to build a further layer into it.

By focusing on one specific charity, visitors know their efforts are making a difference, and can see this effort making a difference when they volunteer in award winning charity work.

It is also appeals as a ‘staycation’, for those nearer the Washington DC area as it provides a quick, guilt free, getaway, which benefits the community.

Some travellers like their whole trip to be centred on giving back to the community and learning, which this scheme facilitates.

“We believe that this package will be a wonderful option for families or couples who are looking for a unique end-of-summer or early fall getaway. It gives guests an exclusive opportunity to get involved in the community by helping others in need – an act that is always extremely rewarding in itself – while also pampering guests with luxurious amenities, such as chauffeured transportation and decadent breakfasts in bed.”

ELIZABETH MULLINS, VICE PRESIDENT AND AREA GENERAL MANAGER AT RITZ-CARLTON WASHINGTON (SPEAKING TO LUXURY DAILY, JULY 2014)
3.1.iii DARK TOURISM

Appreciating that there has always been appetite for looking at the darker side of history in tourism – one needs to look no further than destinations such as concentration camps, war memorials and so on – this trend describes subtle shifts in this appetite. We have placed it within Constructive Tourism because the shift amounts to just that: moving from the consumer’s curiosity for the darker side of history to a much more complex search for authentic representation, critical assessment whilst abroad and ultimately self-development in this search for truth and meaning.

Of course, this is a relatively niche trend – and indeed, it certainly does not hold universal appeal. We can see below that appetite for visiting historic Dark Tourism sites is moderate to healthy in most markets at best – and in the case of Brazil, provokes a strong negative reaction. Positivity from the Chinese market may need to be taken with a grain of salt as well, as some qualitative accounts have contradicted this.

“How strongly do you agree or disagree with the following statements? I am interested in visiting sites associated with historical tragedies whilst on holiday (e.g. sites of battlefields, prisons, slavery etc)” | % who agree strongly or agree | 2014

Unsurprisingly, there is an associated age effect even within those countries that are more receptive to the idea. Particularly in Canada, the USA and Europe, we can see that Millennials are far more likely to agree or strongly agree; meanwhile, Gen X and Baby-Boomers are both more likely to show apathy as well as more likely to show disagreement.

FOCUS ON: BRAZIL

Despite a healthy overall global interest in Dark Tourism, Brazil is a stand-out exception – over 1 in 4 strongly disagree, with a clear majority disagreeing overall.

Brazilian Millennials are somewhat closer to global total average – but even this youngest group reflect only 33% total agreement, 14 percentage points below the global average of all ages. Meanwhile, it’s 2 in 3 Gen X and almost 3 in 4 Baby-Boomers in Brazil who disagree or strongly disagree. Other demographic factors such as income and gender also reveal marginal differences.

“Dark Tourism hasn’t been embraced by Brazilians themselves and it’s usually just foreigners visiting the slum. Apart from the sporadic interest in knowing the sights and places in which wars were fought long ago, Brazilians won’t really seek out places with a dark history.”

TIAGO, SAO PAOLO

“Chinese tourists always are glad to follow auspicious things, so dark tourism is not the trend, at least I can’t see this happening yet in the next 10 years.”

CARRIE, SHANGHAI
Unsurprisingly, there is an associated age effect even within those countries that are more receptive to the idea. Particularly in Canada, the USA and Europe, we can see that Millennials are far more likely to agree or strongly agree; meanwhile, Gen X and Baby-Boomers are both more likely to show apathy as well as more likely to show disagreement.

“How strongly do you agree or disagree with the following statements? I am interested in visiting sites associated with historical tragedies whilst on holiday (e.g. sites of battlefields, prisons, slavery etc)” | % who agree/strongly agree, neither agree nor disagree, and disagree/strongly disagree | 2014

In looking for what drives this desire amongst those who do have it, a sense of authenticity may be the answer. We can see that consumer sentiment towards brands already holds that brands ought to be transparent about their own flaws; given that destinations are brands of their own, there is a natural parallel here.

“How strongly do you agree or disagree with the following statements? Companies should acknowledge negative comments/posts that people make about them on social networking sites” | 2015

Source: nVision Research | Base: 1000-5000 online respondents per country aged 16-64 (Indonesia, Mexico & S. Africa 16-54), 2014

Source: nVision Research | Base: 1000-2000 online respondents per country aged 16+ (China 16-64), 2015 September
Local to Europe, one need look no further than last year’s controversy over the rebuilding of the Prussian royal palace in Germany as the Humboldt Forum – and its commitment to addressing Germany’s colonial history and atrocities committed in Africa and Asia. Part of Dark Tourism is thus increasingly understood as a search for truth; as this grows, consumers may increasingly jump at the opportunity to discover darker sides of destinations simply due to their perception of darkness as authenticity.

“More people want to discover the authentic side of the destinations they visit [Dark Tourism] instead of the regular tourist attractions that the government want them to see. ... Unless there’s an issue of security, this trend will only grow as travellers continue to want to expand their knowledge of the world.”

SAHRISH, TORONTO

“Ground Zero is a good example of a very popular Dark Tourism spot in the USA, as is Alcatraz in San Francisco. It seems to be very active domestically.”

ANNABELLE, NYC

“Dark Tourism: you want to see every aspect of the place you visit.”

MALE, 45, CANADA

However, another part may be the feeling of perspective broadening that is associated with looking at the darker side of things. As affluence rises, there is a growing sense of gaining value through not being blind to the hardship of others – past or present – and whilst this is still in early stages, it may prove to be a driver for consumers in the future.

“With the desire for more than just seeing places and spending time together, people utilise their vacation time constructively more and more often. ... [Complex values] have been the principles of my travel philosophy and my family’s as well. Throughout the years while my kids were growing up, we purposely travelled to many poor places to let the children see a holistic picture of the world to make sure they understand different aspects of humanity.”

XIAOLEI, SHANGHAI

IMPLICATIONS: INSPIRATION & DISCOVERY

Given that the search for Dark Tourism amounts to another search for authenticity and self-development, using this lens to market classically “dark” destinations could be beneficial; emphasising not only the historical import of places like Auschwitz or Anne Frank’s House, but the perspective it could offer visitors.

Meanwhile, there are ways to add this “gritty” sense of authenticity to existing propositions that previously would not fall into the Dark Tourism remit – such as in the case study below from Prague. This could also provide an opportunity for critical reflection with regard to destinations’ own identities and histories - with benefits not only for tourists, but locals as well.
CASE STUDY: Homeless Tours around Prague

Pragulic is a social enterprise, aiming to change the way the homeless side of Prague is viewed and change the public opinion of the homeless. The initiative also gives the homeless a job, helping them to return to ordinary social life.

The tours provide glimpses at places visited by the poor and homeless, receiving a well-rounded tour of the city.

Half the proceeds of each tour go to the guides, and the rest goes to keeping the project running. As the guides design the tours themselves, they often include personal locations, such as a forgotten plaque commemorating the death of 8 homeless people and two dogs in 2010.

NOTEWORTHY STRATEGY?

The tour exposes tourists to a world they usually keep at a distance, and also helps the guides earn an income, and share their stories, often restoring dignity and self-value.

The unique guides show visitors and locals the city from a different perspective. They share their funny, entertaining and sometimes dangerous stories. Tourists enjoy discovering the ‘other’ authentic side of Prague, and what life is like living on the streets, as well as the difficulties people have faced, something not all tourists see.

This is a very natural job for them – they know the places. It’s a kind of therapy from them.”

TEREZA JUREČKOVÁ, ONE OF THREE CO-FOUNDERS OF PRAGULIC

“It’s similar to watching a movie. I was surprised how a person with such a difficult history can think in such a calm way. I was thinking a lot after the tour, about raising my kids, about the risk of finding myself in a similar situation.”

MAREK DARGAJ, TOUR PARTICIPANT

“I’m showing people the other face of Prague, dark places of prostitutes, pimps, gangs of thieves, drug dealers, junkies and everything that normal tourists rarely see. I didn’t choose to be homeless.

When being on the street, being a prostitute, you lose your dignity. Keeping at least some dignity is crucial. I like people’s interest, the questions they ask. I want to help people understand what life on the street is like.”

KARIM, HOMELESS TOUR GUIDE

“Nobody will employ someone who is homeless. But I’m trying to do the best I can. I don’t steal, I don’t cheat people, I don’t abuse welfare benefits. The tours are great. They are a chance for me to explain myself better.” After losing his job in TV news production and going through an acrimonious divorce, Badalec ended up jobless and homeless around a decade ago. He tried finding work, but to no avail.”

HONZA BADALEC, HOMELESS TOUR GUIDE
### 3.2 WORLD WIDE WELLNESS

In this section, we look at the other side of self-improvement: the bodily side. Here, we explore the intertwining of fitness, mental health, sport, beauty and leisure under the loosely united heading of “wellbeing” - an increasingly diffusive concept in the minds of consumers.

Consumer attitudes towards health, after all, are nearly universal and as we can see below, health is one of the primary targets for self-improvement and personal development. For around 2 in 5 globally, a health-related life priority is ranked above all other contenders such as personal finances as something to manage better. Both control-seeking and potential-fulfilling tendencies previously explored are clearly at play here.

“If you could better manage any of the following things in your life which would you choose? Please rank your top three options, as well as any others you would choose.” | % who select any physical or mental-health related option for each rank (see footnote for details) | 2015

<table>
<thead>
<tr>
<th>Option</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>My weight</td>
<td>80%</td>
</tr>
<tr>
<td>My mood/emotions</td>
<td>60%</td>
</tr>
<tr>
<td>The amount of sleep I get</td>
<td>40%</td>
</tr>
<tr>
<td>My stress levels</td>
<td>20%</td>
</tr>
<tr>
<td>My alcohol consumption</td>
<td>0%</td>
</tr>
</tbody>
</table>

*Source: nVision Research | Base: 1000-5000 online respondents per country aged 16-64 (Indonesia & S. Africa 16-54), 2015 February*

Full list of options available in The End of Adventure (page 9) | Physical health options include: my weight, my alcohol consumption, the amount of sleep I get | Mental health options include: my stress levels, my mood / emotions | If respondent selected multiple health-related options, the highest-rank was counted

### REGIONAL DIFFERENTIATION

To no surprise, health-related priorities are extremely important to people across the globe - around half of respondents worldwide will have selected something health-related as their top priority for things to better manage. It is less than 15% everywhere who do not choose any health-related priority in their top three.

There is little fluctuation demographically. 42% of Global Millennials rank a health-related option first priority, which rises to 45% of Gen X and 51% of Baby-Boomers.

"If you could better manage any of the following things in your life which would you choose? Please rank your top three and then indicate any others that you would also choose.” | Of those who have ranked a health-related option first priority, % who say they need to manage each option | Global Average 2015

<table>
<thead>
<tr>
<th>Option</th>
<th>% who say they need to manage</th>
</tr>
</thead>
<tbody>
<tr>
<td>My weight</td>
<td>100%</td>
</tr>
<tr>
<td>My mood/emotions</td>
<td>80%</td>
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<tr>
<td>The amount of sleep I get</td>
<td>60%</td>
</tr>
<tr>
<td>My stress levels</td>
<td>40%</td>
</tr>
<tr>
<td>My alcohol consumption</td>
<td>20%</td>
</tr>
</tbody>
</table>

When we look closer at those who prioritise a health-related issue as their top management priority, we see that there is a fair amount of representation around non-physical concerns. Weight is the primary target for top-priority management at 31%; given how much it overlaps with conceptions of appearance as well as health, this is to be expected.

However, 26% of this group select mood and emotion. Combined with those who select stress levels, we see that they make up almost 1 in 2 of those who place health as top priority.

*Source: nVision Research | Base: Global average (1000-5000 online respondents per country) aged 16-64, 2015 February*
A large part of this has to do with evolving consumer attitudes around stress. We see that majorities across the world perceive their stress to be a consistent staple of their lives - despite a strongly-worded question around feeling stressed “most of the time”, there is notably strong agreement. Of the four focus markets, this resonates the least with Brazil and the most with Canada - the latter country in which 1 in 10 strongly agree that they feel stressed most of the time.

**REGIONAL DIFFERENTIATION**

Individuals around the world seem indiscriminately stressed - with almost a third worldwide claiming to feel stressed most of the time. We can see that whether or not this global perception actually represents a real shift in stress levels, it is a clear concern for many.

Recalling how many wish to better manage their mental health, this clearly goes hand in hand.

But amongst those who do not feel they are fulfilling their full potential, it is even stronger.

The difference between global fulfilled and unfulfilled respondents represents an almost twofold proportional difference. In Canada, as mentioned above, this effect is actually even more dramatic. For whatever reason, almost 2 in 5 of fulfillment-seeking Canadians claim to also feel stressed a majority of the time.

Perhaps it is then understandable that we see a refocusing of health onto issues such as stress. In the last year, we have seen the global trend of mindfulness explode; meanwhile, in the tangential food industry, we are beginning to see the appearance of “mood foods” claiming to help manage stress as well.

Unsurprisingly, suppliers within the industry have responded to this trend as well. Across the world, new examples of wellbeing-integrated travel have popped up. It is notable how mainstream much of this pitch has become: rather than being either the esoteric yoga retreats or the perfunctory chain hotel gyms of yesterday, today’s health-oriented industry offerings are located in extremely well-trodden ground despite having extremely health-focused offerings.
CASE STUDY: EVEN Hotels

EVEN Hotels are a range of hotels, all currently in USA, which focus on holistic wellness and keeping guests active, happy and healthy whilst travelling.

The range of hotels, created by InterContinental Hotels Group (IHG), aims to facilitate visitors to continue leading a balanced healthy life when travelling.

Their four goals are for their visitors to be active, eat well, rest well and accomplish more during their stay at an EVEN hotel. The restaurant and market, Cork and Kale, caters to all dietary requirements with nutritional, fresh and healthy meals. The rooms are all minimalist, with small workout spaces in each one including yoga mats and other exercise equipment.

NOTEWORTHY STRATEGY?

EVEN Hotels provides its guests with a holistic approach to wellbeing, facilitating easier healthy lifestyle choices. Natural elements of wood, sand, rock and living plants have been used to build the hotels, greeting guests on arrival.

Hypoallergenic linen, natural lighting, antibacterial wipes, promote rest, while the ample desk space, social spaces and high speed Wi-Fi facilitate hard work.

Travellers are also supported through the website wellwellwell.com, a travel site that provides useful health and wellness tips, such as how to rest, eat and exercise whilst away.

“There really wasn’t a holistic wellness brand in the hospitality space, so we asked how do we create that, and our solution is EVEN Hotels.

There’s a lot of tools and websites that address wellness overall, and a lot of tools and sites that address travel, but we didn’t feel there was a lot out there about wellness travel to help people keep that healthy balance when they’re travelling. It’s very much about providing positive options of encouragement, motivation and support.”

ADAM GLICKMAN, HEAD OF EVEN HOTELS, JUNE 2014

Of course, there are other consumer factors at play aside from global stress. The other main driver behind this mentality trend is the rise of personal health technology.

Never before have consumers been able to monitor their health with such precision, to plan their diets with bespoke apps and count calories with barcode scanners. As with many trends in the consumer landscape, we see that the smartphone has truly changed everything - bringing each and every consumer their own pocket personal trainer.

We see that particularly in Brazil and China, where technological advancement has occurred at a much quicker pace in recent years, there is serious appetite for predictive health services; across the world, this holds appeal for those who do not feel they are fulfilling their full potential. Given how we have already explored how important travel is to this group of self-improvers, it is to be fully expected that they will lead tomorrow’s forerunning health tourism trends.
The introduction of personal technology into personal healthcare has blurred the line between health and optimisation — particularly as conversation around preventative healthcare has exploded in recent years.

We expect that in the future consumers will not only attempt to stay healthy by preventing disease and disorder, but by actually seeking to optimise their bodies and minds above and beyond the baseline.

For now, however, we simply see growing attention towards health-related concerns. The increased availability of tools to help consumers track and improve their health has resulted in a natural increase in awareness of it. This is further strengthened by the link between the pursuit of good health and holistic self-improvement.

We see this throughout our qualitative research — where we consistently have uncovered a complexity of consumer needs and narratives that reference how much self-improvement and healthy living have blended together into concepts of meaningful or purposeful travel:

"How interested would you be in any of the following services? A service that helped me to understand the potential impact of my current diet on my future health" | % who are very or quite interested | 2015

<table>
<thead>
<tr>
<th>Region</th>
<th>Global average</th>
<th>European average</th>
<th>Brazil</th>
<th>China</th>
<th>Canada</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unfulfilled</td>
<td>100%</td>
<td>80%</td>
<td>60%</td>
<td>40%</td>
<td>20%</td>
<td>0%</td>
</tr>
<tr>
<td>Fulfilled</td>
<td>0%</td>
<td>20%</td>
<td>40%</td>
<td>60%</td>
<td>80%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Source: nVision Research | Base: Global average (1000-5000 online respondents per country) aged 16-64, 2015 February

The introduction of personal technology into personal healthcare has blurred the line between health and optimisation — particularly as conversation around preventative healthcare has exploded in recent years.

We expect that in the future consumers will not only attempt to stay healthy by preventing disease and disorder, but by actually seeking to optimise their bodies and minds above and beyond the baseline.

**IMPLICATIONS: INSPIRATION & DISCOVERY**

Striking the balance between marketing holidays as healthy without becoming too niche need not be difficult; the key is to bear in mind is narratives of self-improvement, self-restoration and self-optimisation.

More importantly, however, is that those who are looking to de-stress are not necessarily looking to do so by lying on the beach anymore. With World Wide Wellness in place, the remedy for stress has actually become an increase in activity; consumers wanting to take a proactive handle on their general wellbeing will be looking for things to do to change gear, and alter the pace or rhythm of life. And even for those who are still seeking a destination to just relax in, there will still be a sense of purposeful action — actively retreating, restoring, becoming more mindful.

For now, however, we simply see growing attention towards health-related concerns. The increased availability of tools to help consumers track and improve their health has resulted in a natural increase in awareness of it. This is further strengthened by the link between the pursuit of good health and holistic self-improvement.

We see this throughout our qualitative research — where we consistently have uncovered a complexity of consumer needs and narratives that reference how much self-improvement and healthy living have blended together into concepts of meaningful or purposeful travel:

"This has definitely grown and one part of that growth I am particularly susceptible to is the idea of self-improvement through travel and adventure which has been largely popularized by the media and such books / motion pictures as Under the Tuscan Sun and Eat, Pray, Love. I lived in Australia for a year and a friend came to visit and booked a side trip to Bali, simply to infuse her vacation with a week of solitude and chance for growth."

KELLY, SAN FRANCISCO

"I am looking for a travel experience that is enjoyable, active and somewhat broadens my horizons. I want to feel better when I get home than when I left — physically, intellectually and emotionally. I want to get exercise, see new things, learn new things, eat new things and return home with to some degree an altered perspective."

CONSTANCE, BEST WESTERN FRANCHISE OWNER, NAPA VALLEY USA

"Resort developers I am working with [I am an architect] are starting to look into more environmentally sensible destination/venues such as tree houses, wood houses, boat houses, tent houses etc. instead of the typical 5-star large modern hotel. Within those venues, activities are also ... more related to nature, education and health and wellbeing."

XIAOLEI, SHANGHAI

This is the crux of how health and travel will come to meet — two pursuits that already have a long history together in the form of medical tourism, escapist retreats, and similar. The following trends aim to explore how health tourism is expanding its purview to respond to the consumer’s hunger for new ways to self-improve. This has never before been easier, with perceptions and definitions of health now encompassing an increasingly broad range of travel-friendly concepts: mental and emotional wellbeing, spiritual growth, adventure, athleticism and more.
3.2.i THE EVERYDAY ATHLETE

For the last decade, crisis cries around globally unprecedented levels of sedentary behaviour have permeated consumer consciousness around health. Between rises in both prevalence of desk jobs and volume of processed foods worldwide, by the early 2000s, the consumer population had never felt more anti-athletic.

Whether the health-consciousness we are seeing represents a true mass market bounce-back towards healthier behaviour or is simply a media-driven phenomenon, we find that the mass affluent consumer today has unprecedented levels of aspiration towards being athletic.

"How strongly do you agree or disagree with the following statements? Keeping physically fit and active is important to my identity" | 2015

![Graph showing the percentage of respondents agreement levels globally, by region and country.]

Source: nVision Research | Base: 1000-5000 online respondents per country aged 16-64 (Indonesia & S. Africa 16-54), 2015 February

Meanwhile, consciousness around appearance has not waned – certainly not amongst those active on social media, who not only contend with media-driven standards of appearance but also collective peer-driven ones. We find that the proportion who wish to better manage either weight or appearance is extremely high.

"If you could better manage any of the following things in your life which would you choose? Please rank your top three options, as well as any others you would choose." | % who select “my weight” or “my appearance” for each rank (see footnote for details) | 2015

![Graph showing the percentage of respondents who selected “my weight” or “my appearance” for each rank.]

Source: nVision Research | Base: 1000-5000 online respondents per country aged 16-64 (Indonesia & S. Africa 16-54), 2015 February

Full list of options available in The End of Adventure (page 9). If respondent selected multiple health-related options, the highest-rank was counted.

REGIONAL DIFFERENTIATION

Exercise and physical fitness is important for large swathes of the population.

Of course, given social expectation around fitness, it’s unsurprising to see such a high volume of combined agreement. More significant may be those who strongly agree - approximately 20% on average. These are likely to be the truly committed; that proportion who will likely lead this trend. They will be very open to holiday options that emphasise fitness - and at 1 in 5, this is a significant market.

Meanwhile, consciousness around appearance has not waned - certainly not amongst those active on social media, who not only contend with media-driven standards of appearance but also collective peer-driven ones. We find that the proportion who wish to better manage either weight or appearance is extremely high.

If you could better manage any of the following things in your life which would you choose? Please rank your top three options, as well as any others you would choose." | % who select “my weight” or “my appearance” for each rank (see footnote for details) | 2015

REGIONAL DIFFERENTIATION

Weight and appearance management is a significant top priority for the three Atlantic markets, particularly America - but much less so for China.

Importantly, this should not be attributed to simply being a product of regional struggles with obesity – not least due to obesity recently becoming a true epidemic in China as well. A deeper dive into this data shows that of those who would like to better manage weight, there is only slight overrepresentation of respondents who are overweight or obese.

Meanwhile, analysing this group by behaviour reveals that significant proportions are those who are regularly exercising.
But beyond the basic fact that consumers today seem to have more pressures than ever making them body-conscious, there is deeper insight when it comes to the blending of fitness, beauty and health. As appearance-consciousness is so tied up in identity, we see mindsets towards health and fitness taking a similar shape to mindsets towards control: consumers today do not only want to be healthy, but they want to appear healthy as well.

“How strongly do you agree or disagree with the following statements? Keeping physically fit and active is important to my identity” | 2015

It goes without saying that in the current climate of control and self-improvement, it is unlikely that we will see such volumes of consumers who wish to truly “let go” whilst on holiday; but more than this, we see that consumers may pursue athletic holidays not only in pursuit of having the appearance of an athlete’s body, but the appearance of an athlete’s identity as well.

IMPLICATIONS: INSPIRATION & DISCOVERY

Marketing destinations based on the opportunity to be active should not be regarded as alienating to those who wouldn’t necessarily pursue a sport-driven holiday - due to the aspiration surrounding fitness, it’s likely that associating activities and destinations with exercise and health culture will still be appealing to large majorities.

There is also the 1 in 5 for whom keeping physically fit and active is extremely important; not all of this group will necessarily have considered combining their love of fitness with adventure, exploration and simply getting away. Finding ways to identify and target these individuals could lead to them considering destinations that they normally would not.

Of course, there are more structural factors that enable The Everyday Athlete as well. A clear story that we see in both our qualitative and quantitative findings is the demographic shift of older consumers beginning to pursue unprecedentedly active leisure, contributing not only to the increase of aspirational athleticism, but to an increase in real athleticism as well.

In many Western markets, the compression of morbidity - the extended number of actively healthy years the average person has within an ageing population - has certainly contributed to this sense of re-energised athleticism. In markets such as China, where older populations have long been health-oriented due to cultural habit, we see them now ageing into firmly middle-class affluence with which to pursue athleticism in more complex ways than before. But regardless where we are, we are seeing a slightly older population than we are used to pursuing fitness.

“My husband and I retired three years ago and we spent a year getting increasingly bored and lazy, so we decided to run a half marathon in every state. Since last March we have run 26 half marathons and we like to spend 10–14 days in each state to have time to explore and enjoy the surroundings. I had never run a half marathon before I retired and I am happy I now have time to both exercise and travel.”

FEMALE, 64, USA
“Which of these best describes how often you do each of the following activities? Play sport / do exercise” | % who do this at each frequency | 2015

<table>
<thead>
<tr>
<th></th>
<th>Never</th>
<th>At least daily or more</th>
<th>Between weekly and daily</th>
<th>Less than weekly</th>
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</thead>
<tbody>
<tr>
<td>Global average</td>
<td>100%</td>
<td>80%</td>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>European average</td>
<td>100%</td>
<td>80%</td>
<td>60%</td>
<td>40%</td>
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<tr>
<td>Brazil</td>
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<td>China</td>
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<td>USA</td>
<td>100%</td>
<td>80%</td>
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</table>

**REGIONAL DIFFERENCES**

For anyone who has visited China and seen the local evening phenomenon of retirees synchronised-dancing to popular music in public squares and parks - or more traditionally, doing tai chi in the early morning - it will be no surprise to see that 41% of the Boomer population exercises at least every day if not multiple times a day.

But whilst other countries may not have quite as active an older population, we still see relatively little difference between age groups - particularly between Gen X and Baby-Boomers.

**CASE STUDY: Equinox hotels**

Luxury fitness brand Equinox plan on opening their first fitness focused hotel by 2018 in New York. The hotel will feature a 60,000 sq ft gym, the companies’ biggest gym to date, as well as outdoor and indoor pools. There are plans to eventually open around 75 hotels worldwide.

The company aims to attract many of its regular consumers, who have an interest in health and wellness and who don’t want to give up their normal fitness routine whilst travelling, as well as business travellers who want to stay fit. These consumers have been willing to pay premium prices for upscale gyms and exercise clothes, which the company thinks will translate into them being willing to pay for a fitness hotel.

“We are appealing to the discriminating consumer who lives an active lifestyle and wants to have that as a hotel experience,” said Equinox Chief Executive Harvey Spevak.

**NOTEWORTHY STRATEGY?**

This is the first time a fitness brand has decided to launch a hotel line, signalling a change in both the health and travel industries. Many high paying guests now expect health facilities, especially when travelling for business.

Guests will be able to receive in-room and personalised one on one coaching. All the gyms within or nearby the hotels will be open to guests and to Equinox gym members, as the company want to encourage community spirit and motivation amongst all its users.

“We are appealing to the discriminating consumer who lives an active lifestyle and wants to have that as a hotel experience.”

**MARK MOBIUS, FRANKLIN TEMPLETON INVESTMENTS SPEAKING TO THE WALL STREET JOURNAL, APRIL 2015**

“It’s a deciding factor for me. If a hotel has a tiny gym, I look elsewhere.”

**HARVEY SPEVAK, EQUINOX CHIEF EXECUTIVE SPEAKING TO THE WALL STREET JOURNAL, APRIL 2015**
Finally, we look at the connection with travellers. Our data confirms that there is also a natural bond - we see a strong correlation between valuing travel and valuing fitness:

"How strongly do you agree or disagree with the following statements? Keeping physically fit and active is important to my identity" | % within those who rate travel as valuable to their entertainment at each score (see axis label) | 2015

The Everyday Athlete & Travel

Here, we have taken the entire global sample and grouped those who rate travel to new countries 1-2 and 3-4 together; this gives us two groups that are both made up of approximately 1 in 10 of respondents (volume of total given beneath each group).

Despite the differences in volume across ratings groups, we still see a steady trend across the sample which indicates that those who value travel more strongly are also highly correlated to regarding fitness as important to their identity.

Qualitative research also shows anecdotal confirmation. Particularly from the US, we discovered an extremely strong response; however, indications remained across markets.

"I visited Norway during the Golden Week holiday to learn professional hiking and mountaineering with [my] husband."
FEMALE, 35, CHINA

"I recently started climbing because some of my friends do it and always invited me. After going a few times, I’ve really enjoyed and certainly want to do it more."
MALE, 28, BRAZIL

"We’ve seen places offering healthy ... activities such as yoga to achieve peace and relaxation."
FEMALE, 65, CANADA

"We’ve seen places offering healthy ... activities such as yoga to achieve peace and relaxation."
FEMALE, 65, CANADA

"The Chinese are very health-conscious so the key for the development of this trend is to convince them that [products / services] are genuinely better for them."
XIAOLEI, SHANGHAI

"We love going on excursions and trying new activities. On a recent trip to Mexico, for example, we discovered new caves and even went swimming in an underground river which we rappelled down 60 feet to!"
FEMALE, 26, CANADA

Focus on: USA

Qualitative research results from our Americans in particular revealed evidence of two crucial aspects: doing exercise or sport whilst on holiday as opposed to relaxing, as well as travelling to sporting events and melding them with holidays.
Regardless of market, the most important factor in capitalising on this trend will be to ensure that physical activities are meaningful – getting to the heart of the consumer mentality beneath that looks for all-encompassing self-improvement. This trend is particularly effective in combination with other trends: as a way to provide a one-off experience, a sense of adventure, to build a new skill and so on.

3.2.ii MASTERING THE MIND

The final trend in this section addresses the global rise of mindfulness as the newest, biggest health pursuit. Particularly given its highly personal - for some even spiritual - undertones, it is perhaps the leading health trend that ties together ideas of holistic health improvement, control over all aspects of the self, and the ultimate search for meaning and fulfillment.

“The [wellness] travellers’ behaviour is more focused on the solo-experience, may look for spiritual attractions or taking self-guided hikes and tours to experience a place on their own as for this traveller, it is more about the journey than the destination.”

KELLY, SAN FRANCISCO

We look at the global uptake of mindfulness, as well as existing interest:

"Which of these things have you done already and which are you interested in doing in the future? Practiced meditation or mindfulness." | % who select each option | 2015

- I have done this
- I have not done this, but am interested in doing it in the future
- I have not done this and am not interested in doing this

Global Average
- 80%
- 60%
- 40%
- 20%
- 0%

European Average
- 60%
- 40%
- 20%
- 0%

Brazil
- 40%
- 60%
- 20%
- 0%

China
- 40%
- 60%
- 20%
- 0%

Canada
- 40%
- 60%
- 20%
- 0%

USA
- 40%
- 60%
- 20%
- 0%

REGIONAL DIFFERENTIATION

Overall, there is healthy interest in mindfulness - we expect these proportions to grow in future, as it continues to make its way into the global mainstream.

Notably, the proportion of those who have done it does not change across markets. Interest levels, however, are different; they are highest in China, perhaps due to the relative cultural nativity of the practice.

Source: nVision Research | Base: 1000-5000 online respondents per country aged 16-64 (Indonesia & S. Africa 16-54), 2015 February

“Americans are very into sporting culture and spend their leisure time attracting sport games on the weekends, or visiting amusement parks. I think this also applies to vacation - a lot of Americans prioritize fun vacations where they can visit theme parks or do activities.”

ANNABELLE, NEW YORK CITY

“Another travel trend I’ve noticed is fitness. ... There is a very popular half marathon series that encourages people to travel, called Destination Races. Destination Races is a half marathon series that holds events in wine countries around the States. I have done 3 and noticed that a large majority of runners travel to participate.”

KELLY, SAN FRANCISCO
Across the board, it is around 1 in 5 who have already tried it; it is a further 1 to 2 in 5 who are interested, depending on the market.

In tandem, we also see that significant global minorities agree that they "find it hard to clear [their] mind of thoughts and concentrate on the present". Whilst it is not a mainstream pain point, it could prove to be a future-facing one - particularly as lives get more demanding, and focus becomes inevitably more fragmented by mobile living.

"How strongly do you agree or disagree with the following statements? I find it hard to clear my mind of thoughts and concentrate on the present" | 2015

![Regional differentiation chart](chart.png)

Source: nVision Research | Base: Global average (1000-5000 online respondents per country) aged 16-64, 2015 February

Mindful travel may also emerge as the new way to pursue relaxation travel - without impinging upon the sense of letting go or missing out on the opportunity to do more.

"As my kids gets older, those trips where you can go to a silent retreat or just meditate for a week become more and more appealing!"

FEMALE, 33, USA

**IMPLICATIONS: IN-DESTINATION**

If consumers are indeed finding it difficult to concentrate on the present, this could contribute to travellers not enjoying their holidays as much as they potentially could. Having seen the propensity to book or cancel last-minute, micro-manage all aspects, and constantly look for better, this is likely to be unsurprising.

Given the latent interest in mindfulness, holiday-providers could provide opportunities for consumers to take moments to unwind and focus - whether if it is through explicit invitations to try out mindfulness (as seen with British Airways, below) or smaller cues built into existing propositions.
CASE STUDY: British Airways & Mindfulness Institute

British Airways offer help and tips to overcome pre- or in-flight anxieties. As part of this service, in collaboration with the Mindfulness Institute, they have introduced an in-flight meditation program.

They have created 3 video tutorials by mindfulness instructor Mark Coleman, which aim to soothe nervous passengers by teaching them simple techniques to remain calm, while they wait to board the plane, during the flight and when they have to disembark the plane. All videos are available to watch onboard the plane.

The airline also offers tips for a more relaxing journey, such as comfortable clothing, moderating alcohol and coffee, taking naps and stretching during the flight.

The airline also offer health and wellbeing advice on their website and in their in-flight magazine.

NOTeworthy Strategy?

The key to mindfulness is learning to accept whatever is happening in the current moment.

This strategy helps people feel more comfortable when flying, and might influence travellers’ choice of airline in the future, as well as targeting those consumers who already have an interest in mindfulness.

“At British Airways we design the flying experience to maximize our customers’ time, whether they want to work, rest or be entertained. Introducing mindfulness practices allows customers and our employees to be at their best and be ready for the next part of their journey.”

SEAN DOYLE, AMERICAS EXECUTIVE VICE PRESIDENT, BRITISH AIRWAYS APRIL 2015

“Mindfulness has been shown to lower stress and reduce its effects on the brain, improve both mental and physical well-being, help you sleep, think more clearly, reduce inflammation through the body and much more. By incorporating the techniques outlined in the mindfulness videos customers can begin practicing mindfulness from when they arrive at the airport and throughout their journey. The practices will help travellers experience calm and focused travel, even when there is a lot of activity going on,” British Airways’ mindfulness consultant Mark Coleman told Mashable.

MARK COLEMAN, FOUNDER OF THE MINDFULNESS INSTITUTE SPEAKING TO MASHABLE, APRIL 2015

This is a somewhat younger trend: Millennials are more likely to find it difficult to clear their minds, as well as more likely to be interested in practicing mindfulness.

“How strongly do you agree or disagree with the following statements? I find it hard to clear my mind of thoughts and concentrate on the present” | Global Average 2015

Source: nVision Research | Base: 1000-5000 online respondents per country aged 16-64 (Indonesia & S. Africa 16-54), 2015 February
However, the strongest dividing factor is not demographic but attitudinal - bringing us back to the global cohort of those who do not feel they are fulfilling their full potential. The difference here is truly huge, with over half of the global unfulfilled either agreeing or strongly agreeing to finding it hard to clear their minds; in those who do not feel this lack of fulfilment as strongly, it drops to 1 in 5.

"How strongly do you agree or disagree with the following statements? I find it hard to clear my mind of thoughts and concentrate on the present" | 2015

REGIONAL DIFFERENTIATION

With the exception of China, the disparity between segments here is genuinely remarkable. Bearing in mind that the statement on fulfilment yields roughly equal proportions of society worldwide, this particular factor marks one of the most salient dividing features.

"Which of these things have you done already and which are you interested in doing in the future? Practiced meditation or mindfulness" | 2015

As the movement grows in popularity, so may the belief that pursuing mindfulness is not only a route to relaxation, but genuine self-improvement - allowing consumers to become more effective and more in control. We expect future travellers to seek the integration of mindfulness into their holidays, or even to be inspired into travel in pursuit of it.
3.3 CONSTRUCTIVE TOURISM: RECOMMENDATIONS FOR TOURIST BOARDS

NTOs must recognise the changing nature of travel, in that travellers are looking for more from their time away from home. This can mean both offering opportunities for learning and challenge or providing vacation choices with wellness benefits.

1. PROVIDE ADDITIONAL BENEFITS: OFFER LEARNING AND CHALLENGE

NTOs must recognise the more active and participatory nature of future travellers. While, non-purposeful, relaxing vacations will still be a feature of the future travel landscape, more and more visitors will want to come back from their trips with new skills or knowledge.

More specifically we recommend that:

a) NTOs and visitor attractions should look to implement in-market Augmented Reality solutions to improve the quality and depth of the visitor experience they offer. Some examples of this have already been discussed in the earlier sections. Tools such as the Time Traveler iTunes and Android phone app will offer those visitors who wish to immerse themselves deeper in their destination the chance to overlay data, commentary and insights right on top of the world they are looking at directly.

b) NTOs need to leverage an untapped resource: the expertise of local citizens to provide a more authentic, less sanitised experience of life in their country or city. Again, solutions already exist in this space. Services such as withlocals.com and eatwith.com put visitors directly in touch with local residents to spend time with them, eat with them and learn from them. Launched in 2013, Eatwith connects travellers with locals who invite them to their homes to experience a locally-made meal at a small cost. Travellers who sign up to the website can search for dinner hosts not only based on location but also by meal and specified price. All hosts are asked to provide a short bio, allowing travellers to get a better idea of who they will be dining with.

c) NTOs must fight the natural inclination to showcase only the best of their country. They should look to tell more varied, nuanced and potentially challenging or discomforting stories to visitors who are now sophisticated enough to cope with this approach.

2. PROVIDE ADDITIONAL BENEFITS: WELLNESS

NTOs must recognise that wellness is becoming so engrained in the lives of people around the world that they will increasingly want to include wellness offerings within their travel.

More specifically we recommend that:

a) Each NTO needs to establish a clear view on what type of wellness tourism is most appropriate for its market.

b) Aside from destinations with a clear USP in this area (e.g. spa towns), all NTOs should look to incorporate wellness versions into their standard offerings. For example:

1. For the Everyday Athlete, examples of some ways which may appeal to the physically fit can include cycle and walking versions of city bus tours, as well as promoting the pedestrianisation of city centres

2. For Great Minds, partnering with hotels and spas to offer calming end-of-day experiences to help visitors de-stress after a busy day of sightseeing

3. More broadly, ensuring food offerings include healthy options

c) Holidays represent occasions when people have more time and inclination to walk than they usually do and NTOs should look to champion walking as a cheap, healthy and more engaging way for visitors to experience their city or region. Providing walking maps, with timed and graded itineraries for walkers of differing ages and/or physical abilities is one possibility. High tech options also exist. While not specifically in the travel and tourism sector, the app Stepjockey1 is a good demonstration of how such good behaviours can be incentivised and turned into a game appealing to consumers’ innate sense of competitiveness, with themselves and with others. The service offers customised stickers showing the step count and calories burned by walking up the stairs in office buildings, or leisure venues.

APPENDIX

RESEARCH METHODOLOGY

Quantitative:

• Our original research covers over 25 global markets, with UK, US, Europe, and Global subscriptions. The research featured in this report primarily comes from two global waves of research conducted in February and September of 2015.
  o In the February wave, 27 countries were sampled; the smaller September wave sampled 7.
  o All samples are nationally representative using latest census data.
  o For generational age breaks, the following definitions are used:
    • Millennials (sometimes called Generation Y): born after 1981
    • Generation X: born 1961-1981
    • Baby-Boomers: 1945-1960

• This report features considerable further analysis of the data, revealing attitudinal and behavioural correlations across and between markets. All data analysis was performed in-house by our Data Team.

Qualitative:

• We have access to a network of 200+ Trendspotters and experts across the world. This piece features quotes from our own bank of qualitative research, as well as research that the European Travel Commission specially commissioned for the purposes of the report.
  o The commissioned work features two core trendspotters from each of the four key inbound markets: Brazil, China, Canada and the USA. These trendspotters reached out to a wide variety of further participants from their networks, seeking diverse demographics and perspectives.
  o Core trendspotter quotes are presented with their name and city of residence. Networked trendspotter quotes are presented with their gender, age, country and occasionally occupation where relevant.
  o All other quotes come from our own proprietary research and are cited as such.

• We also have an Innovation Scanning programme to identify the most innovative industry case studies whose offerings index highly against the demand seen in our trends, from multi-national corporations to tech start-ups.

ABOUT FUTURE FOUNDATION

Who are we?

Future Foundation is a global trends agency based in London, New York and Stockholm. We are the number one independent global consumer trends and insight firm working with smart businesses who are:

• Overloaded with information but lacking clear, actionable and commercial insights
• Concerned they are at risk from competitor innovation
• Unsure where to move next in an uncertain market (or geographic) landscape

We transform strategy, marketing, research, service, innovation, customer analysis and training to strengthen businesses to not just understand the changing world around them but thrive in it.
Our content & services

Future Foundation highlights the real truth behind the changes happening and does not simply produce trends for trends’ sake. Whether it is using our team, proprietary tools or global research – we create a genuine partnership with your business, empowering both individuals and companies to move forward with confidence. Our services include:

- **Consumer Trends** – 60 key and emerging Trends with cross-sector relevance.
- **Examples of innovations** – 1000s of examples from a wide range of products, services, sectors.
- **Economic Reports** – compelling summaries and detailed regional / sector projections.
- **Trends workshops** – exercises yielding our experience of future-focussed workshop techniques.
- **Conferences & Events** – our latest thinking presented powerfully and concisely.