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LIFESTYLE TRENDS & TOURISM

HOW CHANGING CONSUMER BEHAVIOUR IMPACTS TRAVEL TO EUROPE

CONTENTS

LIFESTYLE TRENDS & TOURISM

HOW CHANGING CONSUMER BEHAVIOUR IMPACTS TRAVEL TO EUROPE

A report produced by the
European Travel Commission
and Future Foundation,
in a series of five
trends-based sections.

THE END OF ADVENTURE?
CONSTRUCTIVE TOURISM
SOCIAL LIVING
PERSONALITY WITHOUT PEOPLE
NO ESCAPE

Brussels, May 2016

Lifestyle Trends & Tourism – How changing consumer behaviour impacts travel to Europe

Data sources: This report is based on research conducted by Future Foundation (www.futurefoundation.net) and should be interpreted by users according to their needs

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FOREWORD

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

INTRODUCTION

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.

Social Living is the third 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, **Social Living** is presented on its own. In this chapter, we attempt to break new ground past the obvious – exploring not only the oft-discussed prevalence of peer reviews and online travel communities, but also the emerging mentalities behind these behaviours such as the glamourisation of the grassroots and the demystification of strangers.

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

4. SOCIAL LIVING

How do consumers today socialise, in the post-digital age? How are attitudes towards peers - both those within existing networks as well as strangers outside of them - changing? And in the noisy world of social media, where does the strongest influence lie?

We explore the social side of consumers in two broad areas - first through the lens of their own social habits in a networked world, and then through how they relate to peers. This uncovers three trends in the two categories:

4.1 **Performative Leisure**, which lays the baseline for the ongoing consumer need for social currency on the internet - driving behavioural habits that make *performing* a convincing identity online extremely important, but increasingly nuanced as the social media world matures:

4.1.i **Consumer Capital**, which explores how consumers are using their own social media activity in exchange for rewards from brands online - whether if those are brand-led incentives or peer-driven ones.

4.1.ii **Timehopping**, an extremely emergent trend which explores how consumers are beginning to treat the maturing social media landscape as digital successors to the photo album - but also the challenge that this poses in balancing what is public and what is private.

4.2 **Peer Power**, which explores social perceptions of the idea of "peer" in a world where start-ups and entrepreneurial culture is increasingly glamorous - and what affect this has on the consumer perceptions of authenticity and trust. We also explore a knock-on trend from this:

4.2.i **Connected Communities**, which explores how both social media and the normalisation of peer-to-peer service has contributed to the de-mystification of "strangers" a connected world. This results in new opportunities for social connection, but also newly expanded networks for influence and discovery.

4.1 PERFORMATIVE LEISURE

"Social Living is almost the same as word of mouth for the digital age."

SAHRISH, TORONTO

"People now share their travels on WeChat everyday. Almost at any given day, I am able to 'travel' with my friends around world through their posts. People also subscribe to travel-related WeChat sites. [So] travel is no longer viewed as luxury, but a necessity of lifestyle."

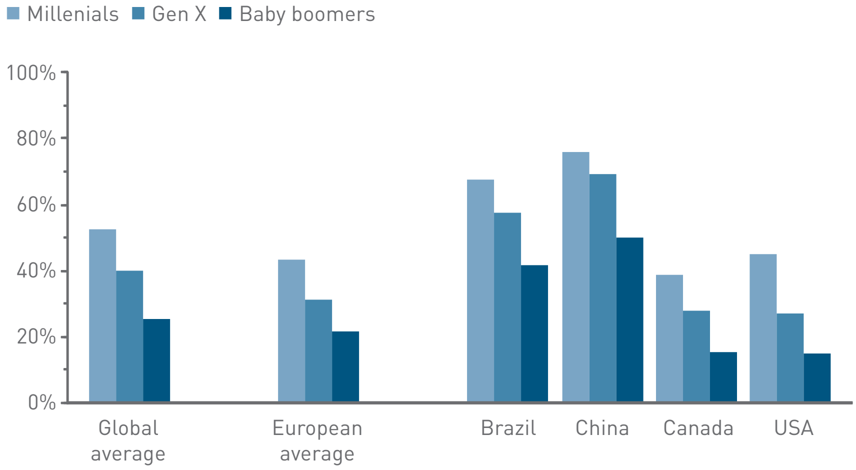
XIAOLEI, SHANGHAI

"Seeing people visit places on social media or hearing them talk about it makes you feel a sort of peer pressure to also holiday there!"

FEMALE, 26, HR MANAGER, CANADA

Over the last decade, brand forays into social media and the social lives of consumers have been well-documented. From the standpoint of consumer needs and attitudes, receiving influence and guidance from social media networks is no longer a trend; it is a truism.

Influenced by social media | "I ask my contacts on social networking sites for advice on products and services I am considering buying" and "I use social networking sites to pass on recommendations of products and services to friends and family" | % who agree to either statement | 2015



REGIONAL DIFFERENTIATION

In China, recommendation culture is particularly strong due to existing infrastructure within local social networks; WeChat, for example, allows brands to give their customers shareable marketing material to pass on to friends and family in exchange for reward points.

Notably, disparity between the youngest and oldest consumers is high everywhere. It is evident that Millennials are the most readily involved in the world of social media influence.

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

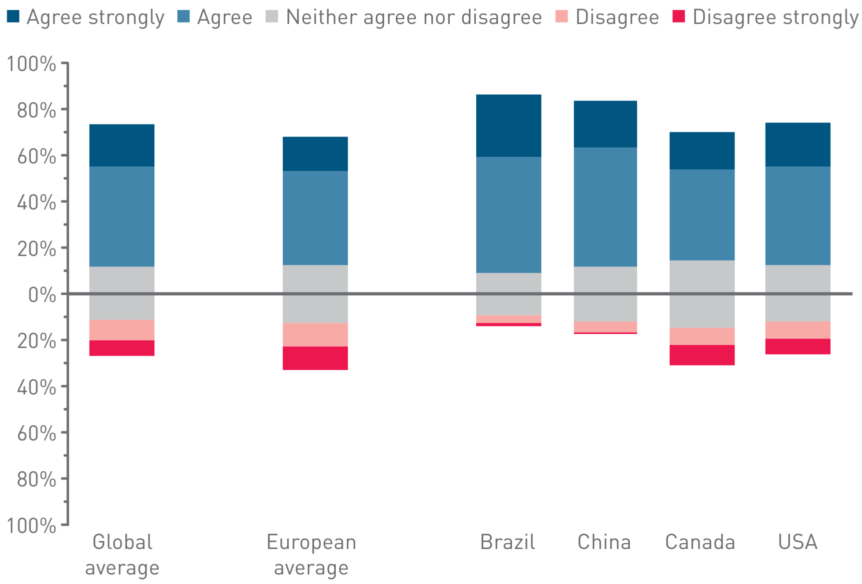
This section of the report does not seek to labour the idea that travellers will be inspired by trips their peers are posting photos of online, or to prove that recommendations from peers are particularly influential; rather, we take these to be known factors about consumers' social lives today, and instead delve deeper into why social networks are such strong motivators for consumers.

Much of how these axes of influence and inspiration have evolved come down to **Performative Leisure** - the byproduct mentality of the constant dialogue consumers face with and between their peers in online social spaces. It is a mentality that drives consumers to look for shareability in their holdiays alongside authenticity; one that drives them to interact with brands online with specific aims; one which puts social networkers in a constant mentality of social capital maximisation that they must balance with preexisting social needs.

Because fundamentally, social recognition is a natural human need. On a basic level, wanting acknowledgement from peers online does not come from a different place to wanting the same in person – the latter of which is something which has existed since the dawn of civilisation.

However, online, this recognition is public – which introduces the dynamic of gaining acknowledgements from friends and family into the world of the wider public eye. It is thus no wonder that we see agreement across the board regardless of market that there is a strong consumer priority placed in online social acknowledgement.

"How strongly do you agree or disagree with the following statements? I like it when people acknowledge my posts / photos / comments on social networking sites" | 2015



REGIONAL DIFFERENTIATION

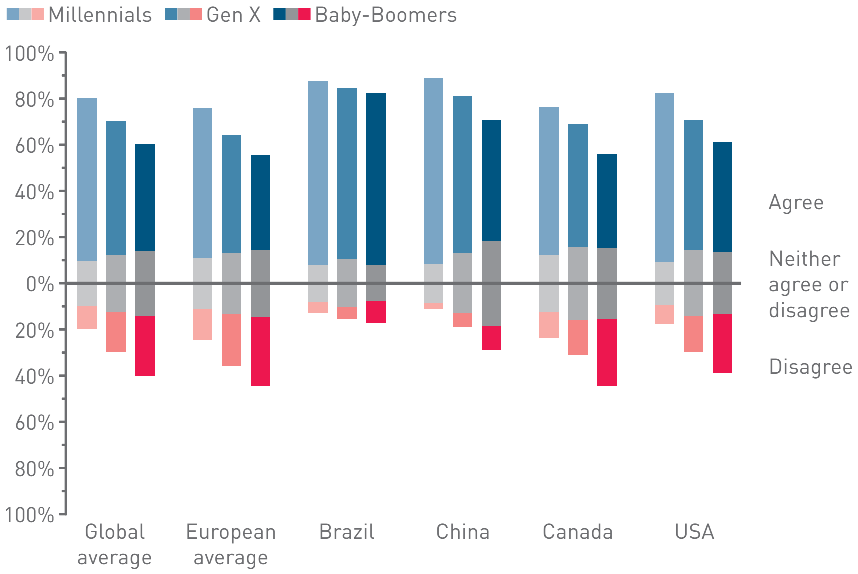
We see extremely little regional differentiation - particularly when we consider that social media participation levels differ significantly between markets.

In China and Brazil, not only is there extremely strong agreement, but also very low disagreement. Disagreement to this particular statement is likely to indicate that the respondent feels friction from a privacy standpoint; it is worth noting that online privacy is likely to be less of an issue for these markets.

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

And of course, it comes as very little surprise that this sentiment is even stronger amongst younger consumers - many of whom will have grown up with social media as a primary social outlet for them.

"How strongly do you agree or disagree with the following statements? I like it when people acknowledge my posts / photos / comments on social networking sites" | 2015



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

REGIONAL DIFFERENTIATION

Particularly in Brazil, we see that older consumers regard online acknowledgement as extremely important in comparison to their Baby-Boomer peers across the globe. Chinese Baby-Boomers show weaker agreement, but also do not tend to disagree.

However, even in Canada, we see that 2 in 5 Baby-Boomers agree that social media acknowledgement is a positive. Given that this includes those who may not be social media users, this is still fairly strong.

Quantitative research findings remind us that this particular social phenomenon is extremely relevant to travel - as travel is one of the most obvious lifestyle activities to share, and one which has an associated culture of online boasting that is identified in multiple markets:

"Brazillians still very much like to share instantly what they're doing, especially when they're on vacation abroad. So what's the use of isolating yourself on an amazing island that has no Wi-Fi to Instagram to your friends how amazing that island is?"

GABRIEL, TRAVEL AGENT

"This is embarrassing and terrible to admit, but I don't think I could stand a trip where I couldn't at least find SOME internet to upload my photos. I'm guilty of selfies."

FEMALE, 26, USA

"Performative Leisure ... is dominant in Canadian culture. ... People are living vicariously through friends' status updates. This [Millennial] age bracket likes to take adventurous vacations, taking snaps while taking part in exciting excursions. They also like to stay the most luxurious destinations they can afford, and definitely like to show off that part of their trip online."

SAHRISH, CANADA

"Performative Leisure is the strongest one of these trends in China as that type of behaviour is being developed through WeChat. I can see this phenomenon grow further over the next decade."

XIAOLEI, SHANGHAI

"when choosing and booking our travel, we seek out places that can keep us connected (Wi-Fi) and will enable us to portray ourselves as living the lives we want to live."

ANNABELLE, NEW YORK CITY

"Performative Leisure extends from vacation into 365 days a year for some people, boasting online about the restaurants they choose, the bars and clubs they decide to go to at night, showing the amount of weight they've lost on a diet regime, to their travel destinations and activities they do on their trips."

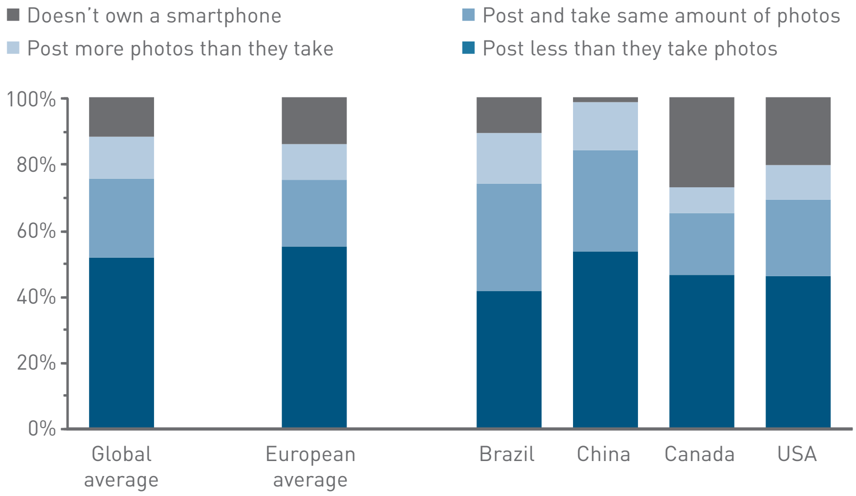
KELLY, SAN FRANCISCO

There is an extremely strong sense from the qualitative work that there is indeed an aspect of social media sharing which is "performed". Given what we have already understood about the consumer need to control the future – as well as the worldwide sense of unfulfilled potential, particularly amongst social media –prone demographics such as Millennials – it is unsurprising that these factors have combined to create the requirement for having socially-conscious, constantly performed personas online.

Travel is one of the primary targets for this type of performed sharing. Particularly as social media is so image-based, we see that holidays and the inevitable photographs that come of them are particularly poised to fulfil the need for shareable moments; and as we have just seen in **Cult of Creativity** in the previous section, amateur travel photography is rampant across markets.

When we examine photo-taking habits more closely, we find that consumers universally are more likely to take more photos than they upload or share – evidence of self-consciousness, or the desire to avoid "oversharing".

"How often do you do the following activities on your smartphone, either through a web browser or an app?" | post/share photos on a social networking site | take photos | % selecting each option | 2015



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

DEEPER DIVE

We asked our global respondents how frequently they did each of the activities on their smartphone; the analysis displayed here shows how often consumers are taking photos relative to their own frequency of posting or sharing photos.

This means that many of those who fall into the group who post or share less than they take photos may never post or share photos at all. Meanwhile, for the smaller group of those who post or share more often than they take photos, this should be understood to be those who re-share existing photos on social media.

This fascinating effect is poignant perhaps because it feels very self-evident; it would feel inappropriate to constantly inundate a public space with every holiday snap. Yet at the same time, we must also remember that there is still the strong need for acknowledgement or even showing off as well – which drives consumers to still post curated versions of their activities.

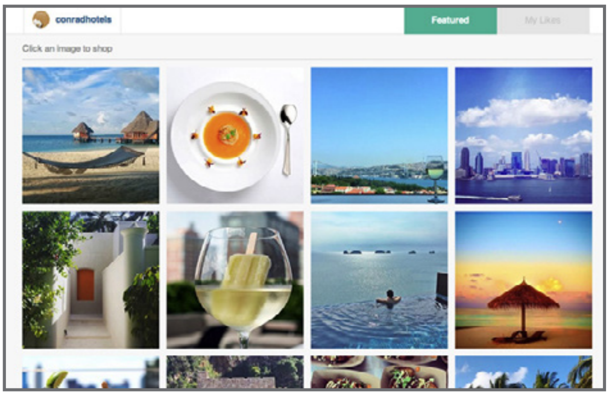
IMPLICATIONS: INSPIRATION & DISCOVERY

There is no longer any doubt: destinations can and must explicitly market their own photogenic-ness for this crowd of eager social media users.

But attractions, activities or even accommodation providers can do very much the same. The rise of the boutique hotel in tandem with the rise of Instagram; meanwhile, much of the long-standing appeal of extreme or unusual activities is how well they are preserved in photographs as unique experiences - and of course how positive a reception they garner from online peers too. Marketing of any aspect of travel may remind consumers how impressive their potential choice of holiday or activity will look; or alternatively, how gritty and authentic it could appear as well.

CASE STUDY: Conrad Hotels Instagram booking

Hotel chain Condra hotels, allows users to book a room at any of its 24 hotels around the worlds, using Instagram. The scheme was introduced by the hotel chains parent company, Hilton Hotels, in conjunction with social media company Like2Buy.



Users have to click on a link on the company's Instagram profile, where they are taken to a separate website, which contain the Instagram photos with links to purchase a room in the corresponding hotel. This microsite and its images lead the consumer to information about the property, TripAdvisor reviews and a booking widget.

NOTEWORTHY STRATEGY?

This method of purchasing acknowledges the changing digital environment and the importance of photogenic imagery when choosing a holiday destination. Quite literally, the hotel group has marketed based on the promise of shareability - and used this as a platform to collapse the inspiration-to-booking journey.

The point of Instagram is to inspire. The Like2Buy technology seamlessly connects you to the booking widget of that property. It's instant gratification for someone looking to truly be inspired to travel.

For us, the real tipping point [for participating in the program] is that Instagram has dramatically surged forward as a preferred platform. We can put up pictures and engage our guests, but how can we bring this full circle, motivate potential guests, 'provide the dream' and facilitate an exchange to excite them to think about booking at one of our properties."

STUART FOSTER, VICE PRESIDENT OF MARKETING AT CONRAD HOTELS AND RESORTS SPEAKING TO USA TODAY, FEB 2015

Performative Leisure is thus a closely partnered theme to the previous two sections of this report. It reminds travel providers and National Tourism Organisations that any experience on offer not only needs to be authentic or adventurous, self-improving or growth-inspiring; crucially, those very traits must be tangible enough to be shared easily in high quality online.

Because crucially, we see from our qualitative research that this consumer need is a driver not only for social media behaviours whilst travelling, but for choice of destination and activity even before travelling as well:

"I think traveler attitudes are definitely impacted by Social Living. People are more likely to book accommodation that fits their desired aesthetic and are more inclined to travel somewhere that might look enviable on their social media accounts."

ANNABELLE, NEW YORK CITY

"I made the decision to move from New York City to Los Angeles. I didn't want to do this the normal way so I decided to bike the 3,000 miles+ across the country. This took two months and not a day went by that I didn't post at least three times. Usually my posts showed where I started, where I ended and what I ate in between... And any other fascinating things along the way. I was by myself for all of those miles and I didn't mind it but I also wanted to share this journey with my family and friends. I understand that there is a danger of "over-posting" but this was more than a trip for me, it was the experience of a lifetime and I wanted to share it."

FEMALE, AGE 39, USA

"Performative leisure would effect accommodation (adventure or brag factor) and destinations boasting extremes in fun, intelligence and sophistication."

KELLY, SAN FRANCISCO

The consumer need for online social capital is a powerful forse. Nevertheless, it is becoming even more complex – particularly as brands enter the foray, attempting to capitalise on peer influence – and also as consumer social media habits themselves continue to evolve. We explore these themes further whilst bearing **Performative Leisure** constantly in mind in the following trends.

IMPLICATIONS: IN-DESTINATION

This social need does not detract from the need for authenticity or any other core travel factor, of course – in fact, there is a strong bond between the need to share experiences and the need for authenticity. Intuitively, we understand that a share-wary consumer will be loathe to clutter their own feed with the marketing material of others, or with anything that looks too pristine; complexities in consumer mentality such as this ought to be embraced.

Travel providers can better enable the successful sharing of holiday experiences by building in photogenic, shareable moments into attractions – and remembering not to necessarily feel a pressing need to tarnish the authenticity of the moment with calls for consumers to make sure to tag or re-tweet. Instead, the "content media" consumers are effectively creating must speak for itself; brands can be sure that if successful, consumers will be happy to pass on details or advice on the source.

4.1.i CONSUMER CAPITAL

This trend comes at the dawn of consumer awareness of their own value to brands when it comes to social media. After several years of public discourse on the phenomenon of "viral" media, of the brand's position in a consumer-led social space, and of the rising power of peer-driven online services, we are soon entering an era where the mainstream consumer is well-aware of how valuable they can potentially be to brands attempting to be successful online – and as a result, will look to capitalise on it.

Particularly from our qualitative respondents west of the Atlantic, we see fluent dialogue that depicts acute awareness of the variety of ways brands are behaving online – and how consumers are responding in turn to capitalise on the situation, from making complaints to becoming brand ambassadors.

"The usefulness and necessity of social media has continued to rise. Consumers are using it more and more to not only document their travels, but also to source information about where to stay. Brands have capitalized upon this and begun to use social media as a means of reaching their customers, and making it easy to establish a solid relationship with them."

ANNABELLE, NEW YORK CITY

"People with a somewhat significant presence on social networks (be it accidental or carefully planned) are constantly approached by brands to help them expose specific products/services to specific groups of people. Advertising agencies are constantly running after users with more than, say, 5k Twitter/YouTube/Instagram/whatever followers to propose partnerships in which the user exposes the brand within his/her particular way of introducing a message to better disguise the paid content (whether through cash or with products/ services from said brand). Politicians do this as well. They track down their organic supporters and turn them into paid supporters so they can boost their campaign/mandate on social media."

TIAGO, SAO PAOLO

"I've had friends tell me that if you ever have a problem on a flight, tweet at the airline or email them and they might offer you something. It seems like it's easier to get their attention online."

FEMALE, 33, USA

"Companies will showcase particular destinations that their employees have been to. Tour companies will showcase Instagram photos travelers have taken with their permission via their own social channel."

TRAVEL AGENT, CANADA

"Millennials are all online, so sometimes it's the only way to get to them, to offer special deals [on social media]."

SAHRISH, TORONTO

This will soon result in a wider consumer mentality that is becoming more savvy to how they can gain benefit from online actions.

But sharing and ambassadorship are only part of the consumer awareness of their own value; increasingly, they are aware of a different type of exchange of online capital: personal data. This sits in a social media space nevertheless, as awareness of targeted advertising and Big Data algorithms rises – consumers will become increasingly aware of how their day-to-day social media activity itself is valuable intel for brands looking to either push their marketing or develop their products better.

CASE STUDY: Virgin Atlantic's 'Let It Fly'

Virgin Atlantic's 'Let It Fly' campaign encouraged travellers to follow their dreams and inspirations.

Part of the campaign included a website where consumers were invited to pack a virtual suitcase for their dream holiday. Virgin Atlantic created a bespoke itinerary for what they thought the individuals dream destination would be, based on the items they had included in their virtual suitcase. By picking destinations based on what a consumer would like to pack, changed the way travellers might think about their next destination, allowing them to consider options they might have previously not considered.

A personalised film was created for each potential traveller, based on a destination, including a restaurant, a specific dish and ideas how to spend an afternoon and an evening in their destination. Live tweets, images and weather updates from popular attractions and local venues were included, with the end of the video displaying city guides, and the option to book flights.

In addition to a TV ad, the campaign included print, digital, outdoor and social media, which were created by Adam&EveDDB.

NOTEWORTHY STRATEGY?

Consumers were entered into a competition to win flights to their suggested destination by sharing their suitcase on social media; a simple enough strategy.

Yet unlike other "Share to Win" campaigns, this one gained particular traction with younger audiences because it offered two crucial things: turning the mechanism of sharing into an act of individual expression that did not impinge upon consumer curation of their profile; and offering a reward that was directly relevant to the input each individual consumer contributed. This made it a resounding success story for post-sweepstake "gamification".

"By creating this online tool, we're looking to inspire our customers to discover our destinations in a fun and engaging way. We're aiming to bring our new campaign "Let it fly" to life by encouraging people to share their dream destination and also offering the chance to win flights."

HAMISH RICKMAN, HEAD OF BRAND ENGAGEMENT AT VIRGIN ATLANTIC SPEAKING TO DIGITAL AGENCY NETWORK, MAY 2015

"We're really excited about what we've worked with Virgin Atlantic to create; a truly innovative, dynamic experience that will serve as a longstanding inspiration tool on VA's website showcasing what 'Let it fly' can mean for any individual. It shows how the brand idea can carry seamlessly into interactive experiences."

ALEX HESZ, DIRECTOR OF DIGITAL, ADAM&EVEDDB SPEAKING TO DIGITAL AGENCY NETWORK, MAY 2015

They will also become more aware of the benefits it could bring them as consumers – making them more flexible to options such as sharing data or personal information. Indeed, we see that especially amongst consumers hailing from outside of Europe, reservations around personal data sharing are particularly low; meanwhile, there is latent interest in relinquishing privacy in return for monetary benefit.

But perhaps the most interesting is how much interest there is in releasing more subtle personal details such as likes and interests – details which might be found on a social media profile – or even personal plans in return for tailored support.

"For which, if any, of the following reasons would you be happy to give permission to a company to use your personal data?" | % selecting each option | 2014

	France	Germany	Italy	Spain	Sweden	India	China	Brazil
So that they can provide special offers / discounts relevant to things I like	41.2%	33.0%	54.4%	42.4%	41.7%	52.9%	53.9%	54.5%
So that they can provide me with personal recommendations for products I might like to buy	15.3%	15.8%	17.4%	24.1%	18.6%	44.3%	41.0%	34.1%
So that they can provide me with helpful advice and tips relevant to me personally	18.0%	16.3%	18.6%	21.8%	15.8%	43.7%	39.0%	30.0%
So that they can learn from my previous purchases /...and better tailor their services to me as a result	13.4%	12.1%	17.9%	14.7%	12.8%	38.2%	46.9%	33.3%
So that they can provide me with funny or amusing content	6.2%	3.4%	7.0%	9.6%	8.6%	18.5%	31.3%	13.7%
None of these	44.3%	51.9%	22.1%	38.1%	49.0%	12.4%	7.8%	19.8%

Source: nVision Research | Base: 1000 online respondents per country aged 16-64 (Brazil, Italy, Spain 16-54 / China, India 16-44), 2014 September

Never forgetting the performative tendencies previously explored, we see that the biggest barrier to public brand advocacy for many consumers tomorrow may no longer be a question of privacy, but of appropriateness and applicability; in other words, whether it clashes with or contributes to their online social image.

The travel industry is responsible for leading much of the innovation in this **Consumer Capital** space. Whilst it is still early days for the more data-led aspects of this trend, travel players have led much of the existing foundations such as collaborating with "Instagram celebrity" consumers to create a mutually beneficial relationship: where the star consumer's profile is elevated by sponsorship (either explicitly or discreetly); and where destinations, hotels or other industry institutions are able to boost consumer awareness in a social setting through this peer level of endorsement.

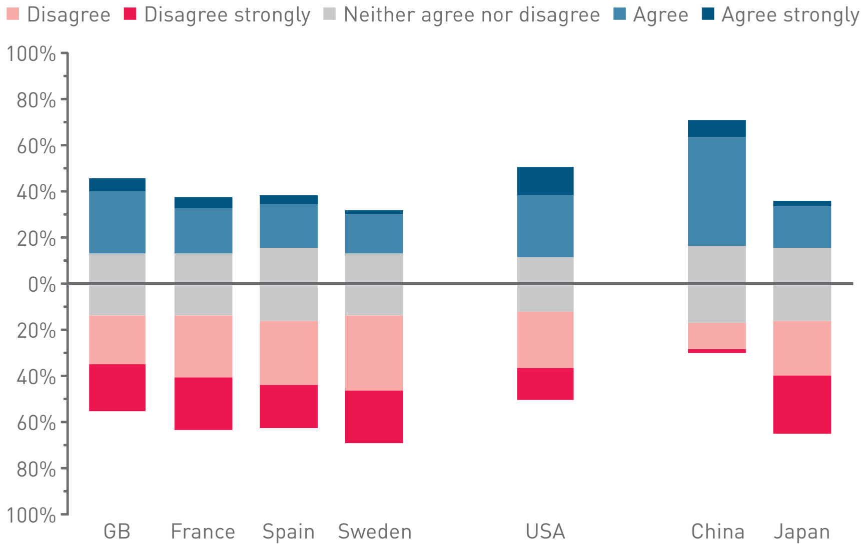
Further innovation may come out of the travel industry as well – particularly as there is a natural cycle of consumer travel-sharing and peer-led inspiration that consumers will allow brands to capitalise on in exchange for benefits. These benefits in turn will become increasingly complex; social currency will of course remain coveted by consumers, but in a world where not everyone can be an Instagram celebrity overnight simply due to a bit of brand recognition, personalised services may become a surprisingly strong pull.

4.1.ii TIMEHOPPING

In **Performative Leisure**, we already examined how consumers are carefully curating their timelines and profiles to display the best public image of themselves. But in the emergent trend **Timehopping**, we also take into account how this is beginning to come into conflict with a separate natural instinct that is slowly becoming a recognisable social media activity: the need to keep a record of one's own personal history.

A survey of several global markets does indicate that any movement of keeping record onto social media is still limited at present; whilst it is strong in China and the USA, there is significant disagreement in most markets:

"How strongly do you agree or disagree with the following statements? I use social network posts to keep a record of the most important moments in my life" | Among social networkers | 2015



DEEPER DIVE

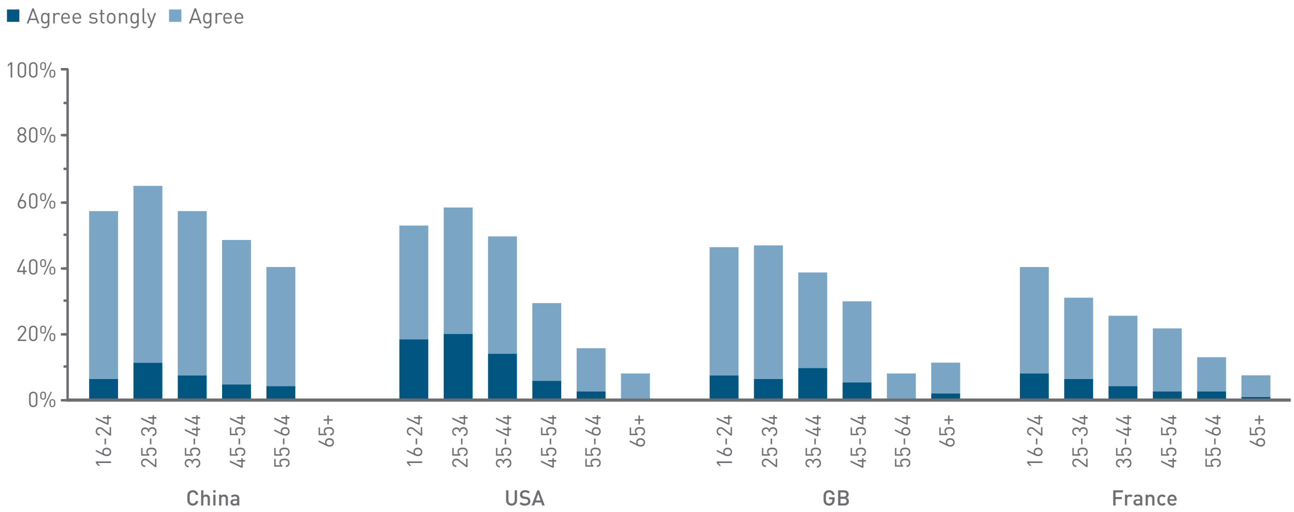
There is a strong global contingent of those who strongly disagree - implying that not only is recording important life moments not within their natural habits, but perhaps even something that they actively avoid or reject.

As we will see below, this is most likely to come from older consumers. Nevertheless, it is important to acknowledge that this trend is still a nascent consumer mentality.

Source: nVision Research | Base: 1000-2000 online respondents among social networkers per country aged 16-64 (Indonesia & S. Africa 16-54), 2015 September

However, looking deeper into a few of the markets displayed above, we see that there is significant difference by age group – and that unsurprisingly, stronger agreement comes from younger consumers.

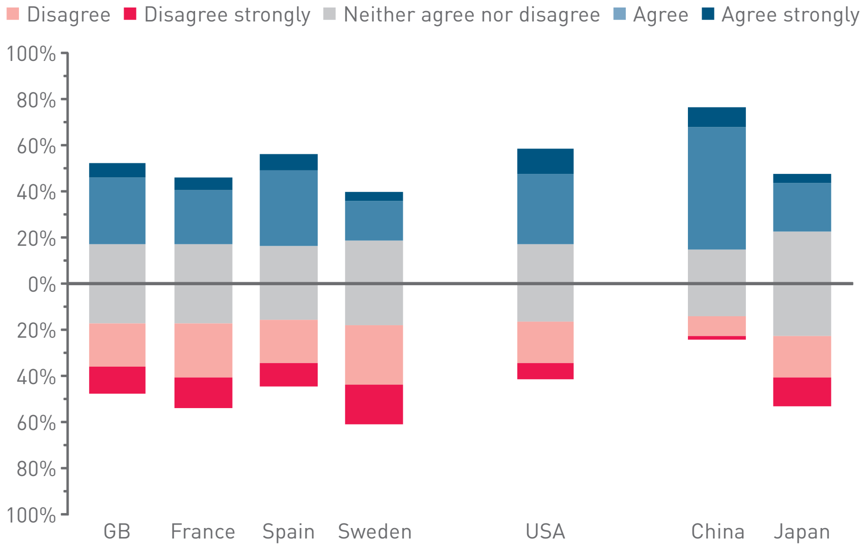
"How strongly do you agree or disagree with the following statements? I use social network posts to keep a record of the most important moments in my life" | % of social networkers who agree strongly or agree | 2015



Source: nVision Research | Base: 1000-2000 online respondents among social networkers per country aged 16+ (China 16-64), 2015 September

This suggests that social media profiles may well be the personal archives of tomorrow. We see a similar budding sentiment when directly asking about photos as well:

"How strongly do you agree or disagree with the following statements? Social networks are a better way to collect photos from the past than physical photo albums" | Among social networkers | 2015



Source: nVision Research | Base: 1000-2000 online respondents among social networkers per country aged 16-64 (Indonesia & S. Africa 16-54), 2015 September

DEEPER DIVE

It is important to note that amongst those who disagree, there is a strong proportion of those who disagree strongly; however, this is not the case with those who agree and agree strongly.

This could imply that of those who disagree, there is likely sentimental attachment involved; meanwhile for those who agree, there may simply be a lack of sentimentality combined with pragmatism.

Timehopping addresses those consumers who are using social media to keep a personal record, and who are using Facebook, WeChat and Instagram profiles worldwide to carefully collect what once would have gone into attic-dwelling photo albums: if the public online space of social networks becomes the primary repository for important memories, what happens when those memories are somewhat more private? And perhaps somewhat more lightly: what challenges arise when the internal consumer archivist must combat the internal consumer curator in those cases where a genuinely enjoyable moment to remember may not have been photogenic enough to post?

Of course, as those who grew up with Facebook profiles from childhood will discover, there is another aspect of retrospectively being embarrassed by past posts or photos; we may be entering an era where the ability to untag or hide is not sufficient, yet deleting online objects outright would be akin to burning old diaries - painful to do no matter how embarrasing the contents. The trend name **Timehopping** refers to the subsequent dance that consumers are beginning to perform – making present decisions based on the longevity of their future value, altering past records based on present anxieties, and so on.

For travel providers, who play such an important role in contributing to consumer memories worldwide - and who benefit so strongly from being memorable - this issue may become a shared tension. Accepting that consumer posts are an extremely powerful source of inspiration within peer groups, there is a potential threat of these items being obscured: deleted retrospectively, not posted at all, or simply buried under the long landscape of other posts and photos making up these long consumer archives.

IMPLICATIONS: IN-DESTINATION

To some extent, this trend simply takes the pressures of **Performative Leisure** to another level; the most straightforward solution to the "archivist" and "curator" tension is simply to constantly have beautifully photogenic, consistently shareable life moments that last for all time. Accordingly, there will no doubt be in-destination innovations to cater to this mounting need – a particularly drastic example being El Camino, below.

But a much more basic step may be simply to realign hygiene factors to consumer need in this space; rather than attempting to make every moment in equal parts memorable and shareable, also spending effort on simply minimising the absolute negatives that would result in automatic vetoing. European destinations may already have an edge on this with their strict rules on cultural preservation that already remove many potential eyesores from key areas. But other simple steps could be viable: from advising local providers on better lighting options for their attractions, to providing cloud-driven photo services rather than print-based ones.

CASE STUDY: El Camino

El Camino is a Latin American travel service which offers journeys with your own personal group photographer, to help you have records of special holiday moments without having to worry about recording them.

The company organises group trps of 10-12 people and has personal contact with each individual traveller pre-travel to make sure they all get the best experience possible. They currently run trips to Mexico City, Columbia, Nicaragua, and Trinidad and Tobago.

Every morning, holidayers receive 20 photographs of them enjoying the holiday frmo the previous day, all of which are ready to upload onto social media profiles. Travellers also receive additional photographs 3 weeks after the trip ends.

The trip is designed to visit hidden, local attractions, all of which provide picture perfect opportunities.

NOTEWORTHY STRATEGY?

Part of El Camino's strategy is that they facilitate you to be able to leave your phone and your selfie stick at home and enjoy being in the moment whilst travelling. They want you to be able to be completely involved in the experiences, not being focused on capturing it.

Being able to effortlessly post updates as daily images, as somebody is taking them for you, enables travellers to relax, enjoying every moment of their trip, knowing they will receive photographs which will last for years on social media

"I was in a water taxi and noticed that the boat was filled with tourists and we all had our iPhones out. We were all looking through these screens at volcanoes. Mobile technology is fantastic—I have no judgment—but it was just an 'aha' moment where I realized travel is different now.

That's what travel is about. It's not about capturing that perfect photo for Instagram, it's about being in the moment."

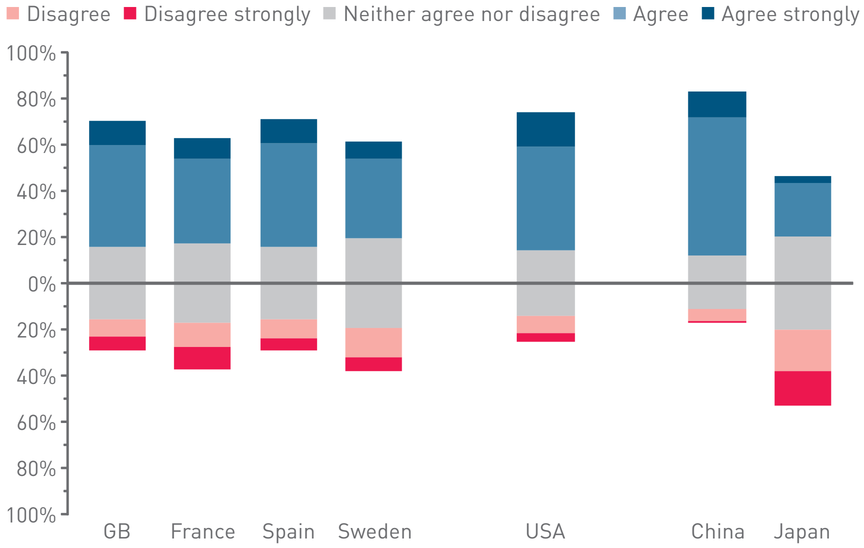
KATALINA MAYORGA, CO-FOUNDER
SPEAKING TO AFAR, MAY 2015

"We all live in an image-driven world. When we were first talking about this, we liked the idea of remembering what pure experiences look like: that you can unplug, that you don't need to see the world through your iPhone. But at the same time we all want to share our experience on social media."

MARIANNA JAMADI, CO-FOUNDER
SPEAKING TO AFAR, MAY 2015

Because ultimately, one of the most meaningful roles of travel providers today is being able to help populate photo albums worldwide – and to provide consumers with valuable experiences that they can indeed look back on fondly. This is a final consumer desire in this space that, unlike the others, does not know the bounds of physical or digital; we see that social networks as a medium are no barrier to the positive sentiment of looking through old memories.

“How strongly do you agree or disagree with the following statements? I like it when people re-share old photos on social networking sites” | Among social networkers | 2015



Source: nVision Research | Base: 1000-2000 online respondents among social networkers per country aged 16-64 (Indonesia & S. Africa 16-54), 2015 September

REGIONAL DIFFERENTIATION

The nostalgia gained by consumers is worldwide - even amongst those countries such as Sweden and France which have proven their social media cynicism in other areas.

Given the emotional importance of feelings like nostalgia to travel, it is important that consumers are able to preserve their memories without tension - as clearly, consumers in a variety of regions do see value in it.

There may be demand for creativity from the industry in overcoming some of these modern tensions. Whilst this is again an emergent trend, it could be an interesting, emotional, and ultimately effective space or marketeers in the travel industry to play in.

IMPLICATIONS: JOURNEY & TRAVELLING

The journey home is a crucial point in the traveller’s holiday where many of the freshly-formed memories are just beginning to settle – and of course, where travellers have to face the bittersweet prospect of returning to their busy daily lives.

Many innovations that help travellers better preserve their memories must of course happen during the trip itself - a particularly drastic example of which we can see with El Camino, above - but others can be as simple as offering time or space at the close of journey to recap and upload. There is still no clear direction for this trend, and it may be the case that this tension fades over time; but for now, there is a space where travel providers may be able to tap into the **Timehopping** mentality and get consumers excited about how nostalgic they will feel in future looking back.

4.2 PEER POWER

This section of the report examines **Social Living** from the angle of community: how consumers are forming communities today, but more importantly how they are beginning to perceive communitarian values. We find that consumer mentalities towards the concept of “peer” are indeed evolving – and particularly when it comes to trust.

We know that online peer groups are highly influential to consumers, whether it be their own personal networks or the wider world of consumer reviewers, travel bloggers and similar. The fundamental driver behind this is simply that these sources are often more relateable; consumers can seek out “someone like me” and be inspired on their own terms. A second factor, however, is trust and authenticity; quite simply, there is not the same suspicion of ulterior motive with peer endorsement as there is with brand advertisement.

Hints of this are clearly visible in the nuances of our qualitative results; there is a strong belief that peer sources are both more relevant and more authentic:

"Travellers fall back on how they use social media as inspiration. If a traveller who is thinking about coming to the Olympic games in Rio de Janeiro starts following social networks of people living in Rio, the traveller will have a better idea of what they'll see whilst in the city. So they'll follow users connected to sports and lifestyle to have a better idea of where to hang out to see and enjoy exactly what they came here for. Which will influence the location they'll choose to stay and the kind of place they want to be hosted in."

TIAGO, SAO PAOLO

"I think Peer Power is most developed in China, because of the vastly increasing use of social media networks for the sharing of experiences / asking for advice. People share their travel experiences online and others' posts can share as inspiration."

XIAOLEI, SHANGHAI

"I really love how people share their experiences on Facebook. If you think about it, I am 63 and I have a handful of friends that are in the same age range, have the same hobbies and are in the same socioeconomic divisions. When Facebook tells me that they have gone somewhere I am sure that I will like the place as well and it gives me a good lead for my next vacation (and also holds the potential for receiving many personal recommendations from friends who have found tried and true gems in the destination."

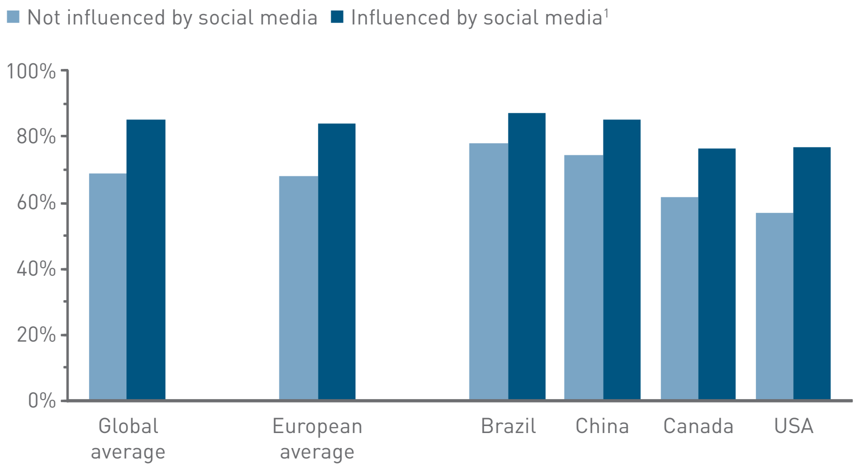
FEMALE, 63, USA

"**FIT (free independent tourist) travels have been popular for a long time** which is much more customised than tours operated by travel agencies which are not at all relaxing."

CARRIE

We also see a clear association in our quantitative data between those who are seeking out non-networked peer guidance (such as reviews) and those who are using social media as a resource for influence:

"Which of the following activities have you done in the last 6 months via any device?" | Read a review online posted by other consumers | 2015



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

METHODOLOGY

Here, we look at the well-known behaviour of reading consumer reviews - not to establish an already-established behaviour, but to examine its relationship to social media use.

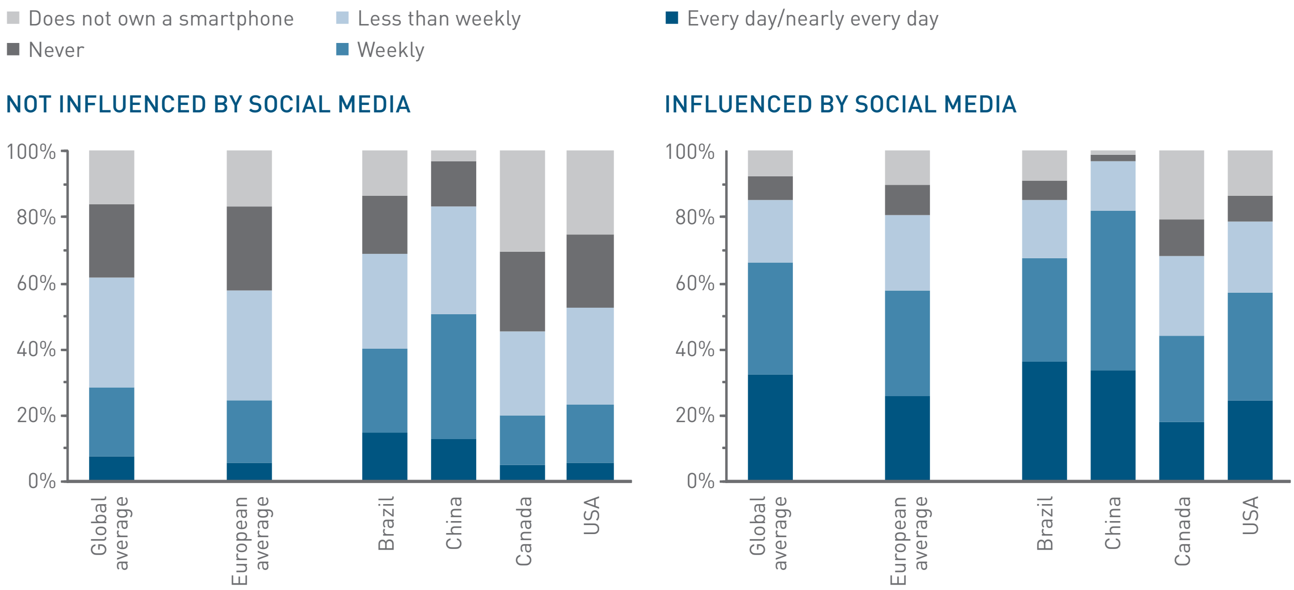
Using the analysis done earlier in this chapter at the beginning of Social Living to look at those who either use social media for giving recommendations or asking for advice, we look at how social media influence creates a wider assumption of trust in non-networked peers.

1. See page 99 for full chart of this group

Overall, those who look for advice on social media are more likely to look for peer-level endorsements in other parts of the online world; this is significant because it suggests that the behavioural habit of social media activity drives a deeper mentality which has led to the overwhelming trust in peers we see today.

Of course, a significant part of this correlation comes down to device ownership and and internet usage. However, this alone does not explain more granular correlations in behaviour – we see that there is not only wider uptake of reviews overall within those influenced by social media, but that this group is practicing peer-resourced decision-making more often:

"How often do you do the following activities on your smartphone, either through a web browser or an app?" | Read product reviews/compare prices for a product or service | among social networkers | 2015



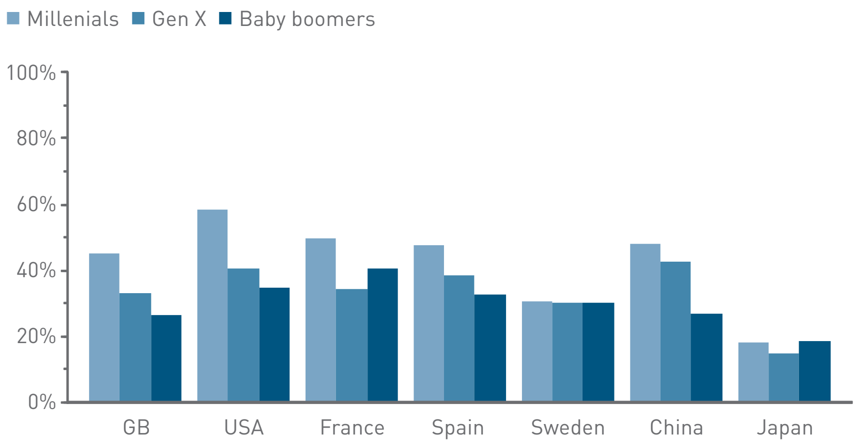
Source: nVision Research | Base: 1000-5000 among social networkers online respondents per country aged 16-64 (Indonesia & S. Africa 16-54), 2015 February

But beyond habit, we find that today, trust in peers is a culture unto itself. Moving on from the well-established realm of consumer reviews, we look at how the recent global movement which idealises and admires startup culture, crowdsourcing and other peer-driven innovations - and how trust in peers is being further energised by this.

We first look at agreement levels to two statements: "I prefer buying from startups or small businesses rather than from large corporations where possible", and "I would rather work for a startup than a big business". For each statement, between just under 3 in 10 across the eight sample countries agree.

When we look at the total group of consumers who have agreed to either or both of these statements, we see an eight-country average population of 36%; amongst Millennials, it is 45%.

How strongly do you agree or disagree with the following statements? | "I prefer buying from startups/small businesses rather than from large corporations where possible" and "I would rather work for a startup than a big business" | % who agree to either statement | 2015



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

REGIONAL DIFFERENTIATION

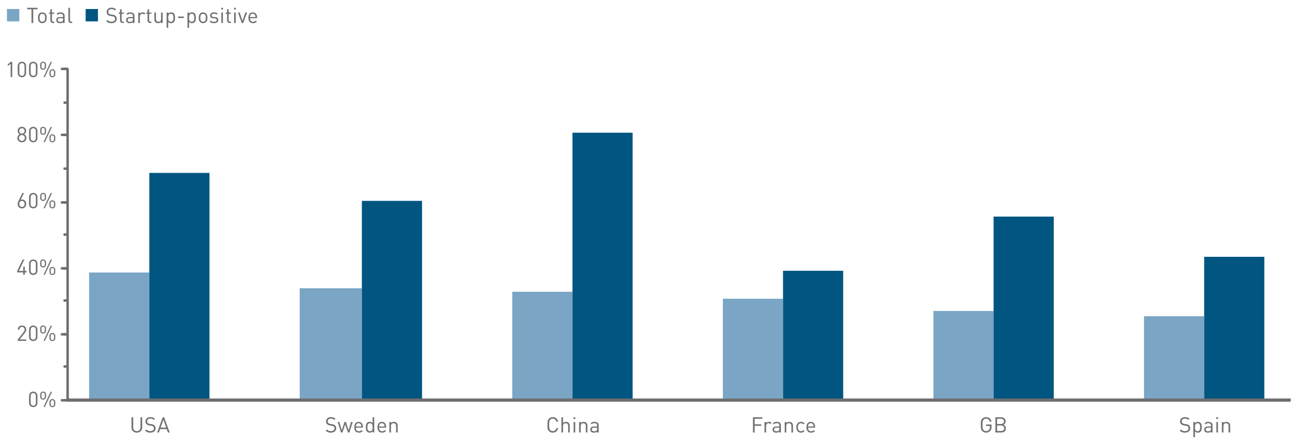
Startup-idealising culture is particularly strong in Millennials, in comparison to their older peers.

Unsurprisingly, it is in America where agreement amongst Millennials exceeds 50%; but strong agreement nevertheless exists across Western Europe and in China.

This global glamorisation of startups and peer-driven services is very important for travel providers – but not simply because many of those services will often constitute challengers and competitors within the industry. Rather, it is important because it opens an avenue of consumer attitude that brands can finally begin to approach in their own right; brands can borrow the existing trust in peers by fashioning themselves as more peer-driven, startup-friendly or even simply entrepreneurial than traditional institutions.

We see that this significant minority of those who feel positive sentiment towards startups are more likely to declare interest in supporting peer investment; although it is a small sample of individuals, we suggest that this is an exaggeration of a more nuanced portrait across markets:

"In the future how interested would you be in using a service that could do any of the following? A service that allowed you to lend money to individuals/small businesses for an interest rate/fee" | % who are very interested or quite interested | 2015



Source: nVision Research | Base: 1000-2000 online respondents per country aged 16+ (China 16-64), 2015 September
Note: Japan not shown due to low sample of startup-positive sentiment

We can see that, irrespective of the true volume of this market, there is clearly a correlation between the culture of startup admiration and interest in supporting peer-led business through real monetary investment. Taken as an indicator of mentality rather than a measure of volume, we can see that the ongoing trend of startup glamourisation is highly likely to drive greater attraction to services which are perceived as innovative, entrepreneurial, or even nontraditional.

This helps explain the appeal behind services which, for all intents and purposes, are large corporations masquerading in startup clothing; services such as Uber, Airbnb or even Facebook. It is the marketing justification for the countless in-house incubators that large corporations are housing – as funding in-house entrepreneurialism not only keeps innovation and talent close, but makes the wider brand appear to be fueled by a much more peer-driven ethos.

It also answers for the success of initiatives that simply reach out to consumers and ask them to make choices and decisions in a decidedly crowdsourced, Kickstarter-esque fashion; a prime example of this in the travel industry is Visit Britain's Chinese naming initiative online as seen in the below case study. Another example comes from Travel Starter, who specialise in crowdfunding services for the tourism sector.

CASE STUDY: Visit Britain's "GREAT Names for Great Britain"

Visit Britain launched their GREAT Names social media campaign aimed at Chinese users of platforms Weibo and WeChat in late 2014, with the help of Ogilvy & Mather.

Idiomatic British names are something difficult to be translated into Mandarin, so this campaign invited people to come up with alternative names for British landmarks and attractions, which are more descriptive and understandable. This campaign is in line with the Chinese traditional of giving more literal names to food, places and celebrities.

Some examples of the new names included Wall of Eternity for Hadrian's Wall, Custom-Made Rich People Street for Saville Row, The Needles of Isle of Wight for Poseidon's Trident.

NOTEWORTHY STRATEGY?

The Chinese public were invited to vote, comment and suggest names for various locations around Britain. This turned the campaign into a competition, with the best suggestions for each location being made official. This utilised the collective powers of ones peers and social media contacts

More than 13,000 names were suggested for over 00 different tourist destinations. The campaign was seen over 300 million times on Chinese social media, with 27 million Chinese watching the launch video.

The favourite names are now used on signs, websites and on Google Maps, to make it easier to visit Britain for those consumers who are not fluent.

The campaign helped to bridge the emotional gap between China and Britain, by using the Chinese language.

"The names of places, people, and events get people talking in China more so than in many other cultures. And at the same time we noticed that many British points of interest are let down by lack of a decent Chinese name. So, we thought, why not invite Chinese people to give them a Chinese name?

Potential tourists, in thinking up names for these attractions, will develop a deep understanding of Britain as a destination and develop a strong affinity to its points of interest. This is the power of a truly social idea,"

GRAHAM FINK, CHIEF CREATIVE OFFICER, GREATER CHINA, OGILVY & MATHER DEC 2014

"Chinese consumers are at the very heart of this campaign, so it was important to give them the opportunity to create history and build an affinity with Britain they've never had before. We made sure the campaign was fully integrated around a strong social idea that will connect the Chinese with Britain and get the whole country talking."

JOSS CROFT, MARKETING DIRECTOR OF VISITBRITAIN DEC 2014

Travel providers who are concerned with the threat of peer-to-peer services in any aspect of the industry – from transportation to accommodation – should be aware of the underlying consumer attitudes afoot. What is truly being demanded is a sense of validated aspiration that comes from selecting a trusted, non-corporate brand; tomorrow, we will see medium-size brands continue to innovate in the Peer Power space by turning this mentality around to their advantage.

IMPLICATIONS: INSPIRATION & DISCOVERY

Not every National Tourist Organisation may be allowed to have the Chinese Internet name their country's main attractions – and of course, there are plenty of well-known examples of crowdsourcing of a similar fashion gone terribly wrong.

But peer-positive sentimentality does not need to be quite so literal; a similar effect could be replicated simply through clear, explicit and well-marketed outreach to grassroots contributors in any fashion. Particularly when it comes to inspiration, we already see that brands and organisations alike will showcase collections of Instagrams of their products or destinations on their own websites. This could be explored further, and would be particularly effective at the point of inspiration where a measure of aspiration can be a strong determinant.

4.2.i CONNECTED COMMUNITIES

This trend is also energised by the same global factors that are propelling **Peer Power** - but here we examine the specific willingness consumers have to engage with strangers. Because whilst our global cohort of travellers have been shown to be extraordinarily risk-averse in attitude, certain behaviours feel almost like exceptions: the prevalence of Airbnb on both the guest and host side, the success of online hashtag-driven meetups, the ongoing staying power of hostels.

Part of this has to do with the simple fact that the online world has demystified much which was foreign about strangers. Today, the common consumer knows that their peer group abroad is more like them than not; meanwhile, services that continue to play on the verification and authenticity elements of peer-to-peer trust have refined a sense of security. In other words: consumers may be risk-averse, but interaction with strangers simply is not perceived to be intrinsically risky with the correct measures in place.

This may partially explain the broad mix of attitudes towards solo travel we see. For some, it is enabled by the fact that social media contacts from home are always a tap away; for others, it is enabled by the promise of kind strangers to meet abroad. Qualitative research reveals that at least online, few have qualms with consulting people they do not know personally – and that this sometimes does indeed extend into real-world meeting as well:

"Face to face social interaction is more important and inviting than relationships through social media. Travelling helps make friends who you end up bonding with and see more often."

FEMALE, 26, HR MANAGER, CANADA

"This theme is less established in China yet. [But] I do have an example [from] myself making a true friend through Instagram. We invited each other to visit one and other if we happen to be in each other's city."

XIAOLEI, SHANGHAI

"Those on their own also see social media as a friend and even an interactive travel journal on the road (social media becomes your travel companion)."

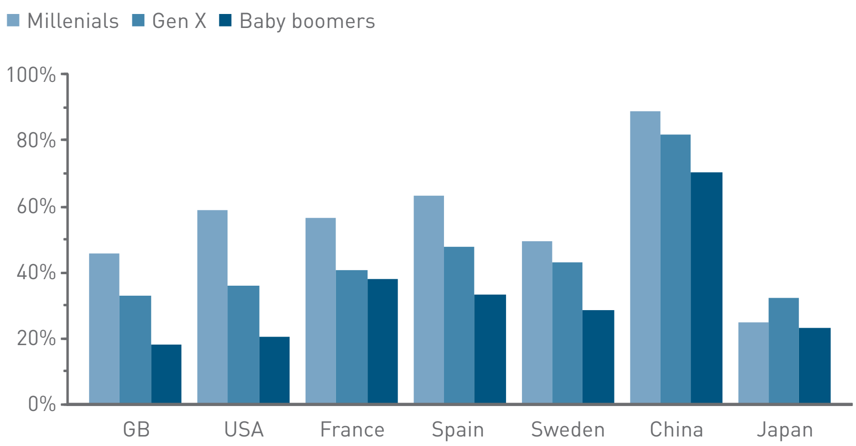
KELLY SAN FRANCISCO

"Brazilians going abroad will use social media channels to get to know more about where they heading to, so they'll follow local brands and people to see what they're saying about the destination and what they can do there for fun. It's a good way to get off the classical tourist route, but not too far off; to experience what the locals experience, but only things that can be palatable to the foreigner's taste as well."

TIAGO, SAO PAOLO

We can see this particularly in younger consumers, from quantitative findings. As above, we looked at the wider cohort who expressed interest in either or both of two questions asking about "a peer-to-peer lending service for household items" and "a ride share carpooling service" - both services dependent on engaging with a peer stranger for mutual benefit.

% who have used or are interested in a peer-to-peer household item lending service or a rideshare carpooling service | 2015



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

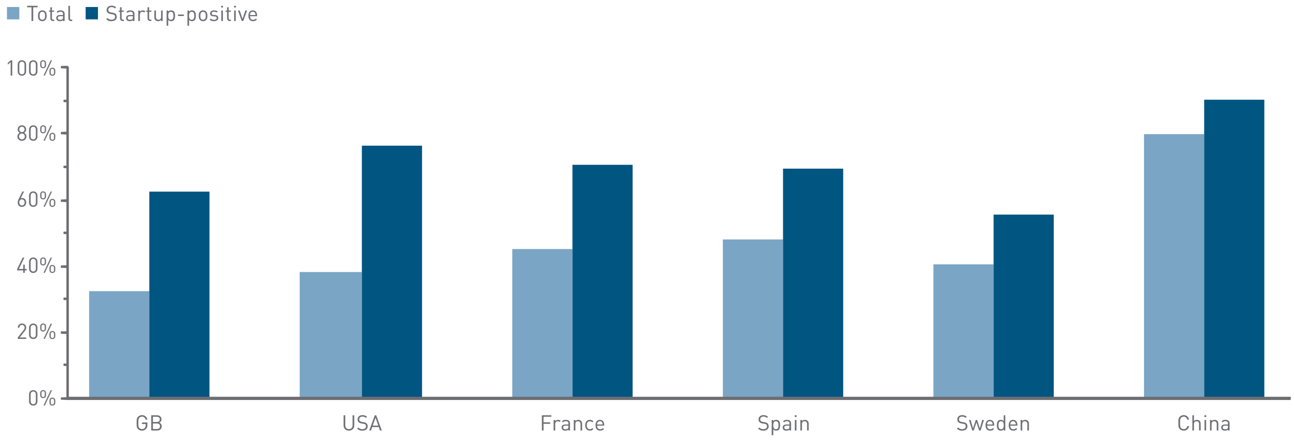
REGIONAL DIFFERENTIATION

Figures are high in China due to the popularity of ride sharing services such as DiDi taxi - a precursor to Uber Pool.

But across markets, high interest and uptake levels can be seen in Millennials in particular; Japan is the only exception. This belies a particular youthful attitude that is stereotypical of the Millennial generation: a market openness towards this level of shared service with peer strangers.

This is of course closely related to **Peer Power** above; accordingly, we see a similar correlation between those who have startup-positive attitudes and those who are interested in peer-to-peer services.

% who have used or are interested in a peer-to-peer household item lending service or a rideshare carpooling service | 2015



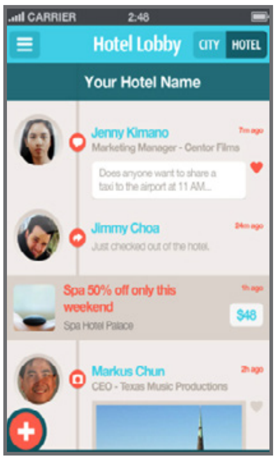
Source: nVision Research | Base: 1000-2000 online respondents per country aged 16+ (China 16-64), 2015 September
Note: Japan not shown due to low sample of sstartup-positive sentiment

We see this as particularly important to highlight for the travel industry as it opens up a large span of opportunities for travel providers to embed meaning into experiences whilst capitalizing on the peer-based trust and authenticity we have already examined.

CASE STUDY: LobbyFriend

The self declared 'first temporary social network app' LobbyFriend, received renewed attention in 2015 after a partnership with various US hotels.

Lobbyfriedn creates chat rooms for guests who are staying at the same hotel at the same time. The idea is to connect lone guests, especially business travellers, who would like to socialise with like minded people when travelling on their own. It can also connect guests at conferences of events in an informal setting. As the app is run by the hotels, when a guest checks out, they are removed from the system.



NOTEWORTHY STRATEGY?

Guests can see if other visitors would like to share a taxi, have a drink in the bar, or just share experiences and tips. Lobbyfriend provides a temporary network, connecting people who are in the same location.

Strangers can become a friend for a short period of time, facilitated by technology, new opportunities for expanding networks and discovery

"The option to meet up with people around common interests makes sense. And it gives hotels a way to communicate more directly with onsite guests for special offers and upsells. In that sense, it can compete with a hotel's own app, but not every hotel has one, and not every guest will want to use it even if they do.'

Guests can find someone with common interests to find a meal, watch a game, have a drink. ... And yes, a temporary social network can be used to form a temporary dating relationship, which is certainly going to appeal to some people as well.''

DOUGLAS RICE, CEO OF HOTEL TECHNOLOGY NEXT GENERATION SPEAKING TO USA TODAY, JAN 2015

"The cool thing about the Lobby Stream is that in terms of the interacting with guests and staff, anything goes . . . guests can ask questions, which will be automatically answered by the hotel concierge. They can also post a message telling other guests about a cool meeting spot. The app is not meant for people to get to know everything about you -- it's meant for people to not feel like they are alone in the hotel. We want guests to remember the hotel and city they are in so that they come back again."

JASON AYOUB, CO-FOUNDER SPEAKING TO IBTIMES, MARCH 2012

Real face-to-face peer contact is an excellent intersection of so many crucial consumer needs in travel: authenticity, adventure, spontaneity, learning, shareability and ultimately something to remember. We know that consumers are already facilitating their own connections to local communities abroad; if National Tourism Organisations were able to coordinate similar connections and communities, initial engagement and resulting satisfaction could rise.

Of course, this is not universal; China, in particular, may be a poor market for this particular attempt. But with social media finally in a mature enough stage for this to be logistically possible, careful positioning could lead to a warm response from travellers hailing from other markets.

At the very least, travel industry providers need not fear that consumer risk-aversion will lead to insularity; rather, we see that for the social media consumer, there is significant comfort that online verification genuinely affords.

IMPLICATIONS: JOURNEY & TRAVELLING

Journeys often contain social loose ends; whether it is a layover, a plane ride, or even a tube journey.

National Tourism Organisations and other transportation-related bodies could look into building flexibility into services that could allow for consumers to seek brief encounters with strangers as much or as little as they chose: asking solo airplane travellers their conversation level preferences when they book, so that they can be seated with like-minded solo travellers; marking out social or conversational train carriages in a similar manner to quiet carriages.

4.3 SOCIAL LIVING: IMPLICATIONS FOR TOURIST BOARDS

We recognise that many NTOs are clearly already active in the social media space, leveraging the connecting power of existing social networks both globally and locally; indeed, the travel industry as a whole has been very responsive to social media marketing trends in the past decade.

We therefore emphasise that this spirit should be continued, and that NTOs remain at the cutting-edge of engaging the social lives of consumers worldwide. This is particularly as the fragmentation of platforms and networks escalates; we see this happening already across the diverse territory of Europe itself, but this is amplified when taken across the globe, where many of the home-grown social media channels that consumers depend on may be entirely unheard of in Europe.

Two key areas of focus for further action both shorter-term and longer-term should be around enabling travellers to maximise what they share on social media and how they share it, as well as around how to incentives consumers to open up their social media streams to marketers such as NTOs.

MAXIMISING SOCIAL SHARING

Support and infrastructure to allow consumers to share their experience to the highest quality will continue to be of utmost importance. In the near future, however, consumers will begin to diversify their suite of shareable media. This is already seeing a shift towards the sharing and recording of digital objects more complex than simply images and text; for example, we have already seen video-sharing and livestreaming such as GoPro play a huge role for travel engagement. Meanwhile, Timehopping reveals that social channels are becoming the new photo album, further putting pressure on consumers to have high-quality records of high-quality moments. Clearly, this offers NTOs opportunities to become part of that behaviour – they should explore the option of helping visitors to create, host and share content that will create unique and long-lasting memories of their trips.

Meanwhile, a different form of maximising will be by providing opportunities for peer-to-peer experiences; this has the known value of facilitating the expansion of networks between travellers and locals, which encourages global networks of engagement and even repeat visits. But for the foreseeable short-term future, it also has the factor of being quite simply what consumers themselves deem to be socially valued and thus very shareable. In order to capitalise on the peer power trend, NTOs will not only need to collaborate more closely with grassroots local suppliers, and recruiting local volunteers as “real” voices - but also to do all of those things more visibly. Through explicit highlighting of these collaborations, NTOs may be better able to capitalise on the ongoing global love of “authentic peer-to-peer” culture.

In the long-term future, travellers could well be sharing their biometric reads from a great holiday - showing spikes of dopamine and adrenaline to ‘prove’ what a great time they had - or a VR recording they took themselves. NTOs will need to keep abreast of the latest developments in social networking, as new platforms emerge (or as existing platforms develop increased functionality – for example Twitter acquiring Periscope, a livestreaming app, and Facebook following suit soon after with Facebook Live). All will offer more automated and more in-depth, immersive and more authentic sharing options.

2. INCENTIVISING SOCIAL SHARING

It is unthinkable that NTOs will not want to access the detailed digital footprints of both visitors and potential visitors to their country – but the level of detail available to NTOs is determined by how much consumers are sharing in the first place. As we have seen, this is not simply a question of data privacy, despite how it is typically framed; there are clear social and personal pressures that are constraining consumers from their ceiling of social media usage.

In the longer-term future, however, consumers themselves will become increasingly aware of the value inherent in their personal details as well as their willingness to generate content. They will need to be convinced that this exchange is in their favour. Tools will emerge to allow consumers to control and limit access to their social networking profiles – and in the long-term, where we predict that concerns purely about data privacy will diminish, it is the social sense of privacy and self-consciousness that will cause hindrance. To counteract this, NTOs will need to incentivise sharing and openness by:

1. Offering financial rewards for shared data

2. Creating appealing, personalised services using publicly-available social media data to show consumers where the advantage lies for them

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.

European Travel Commission