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LIFESTYLE TRENDS & TOURISM

HOW CHANGING CONSUMER BEHAVIOUR IMPACTS TRAVEL TO EUROPE

CONTENTS

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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

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

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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.

No Escape is the final 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, **No Escape** is presented on its own. This brief chapter explores the future of the traveller's relationship with technology by analysing current attitudes in a world where technology is often deemed too disruptive and too prevalent – infiltrating not only workplaces, but homes and holidays as well.

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

6. NO ESCAPE

When control leads to burn-out, where do consumers turn? Is there real appetite for a return to the pre-digital age?

In this section, we will introduce two trends that explore the perennial declaration of need for a "digital detox". With strong ties to health and wellbeing but serious challenges to control, we explore underlying needs:

6.1 **The Power of Quiet**, which discusses the oft-declared wish to go "off the grid" - alongside how stated attitudes are beginning to idealise quietness, escape, solitude and peace. However, we find that actual behaviours do not necessarily follow; this results in a budding demand for the provision of opportunities for quiet which can be electively taken up.

6.2 **Casual Connectivity** looks a few steps further down the line than the anti-digital demand. It explores whether the current consumer need to detox is simply driven by the perceived lack of control over when and how they are connected digitally. This exposes a future of connectivity, where increasingly tech-dependent consumers will flock towards solutions that connect and alert them passively - using predictive analytics to detect when they need it and when to avoid bothering them.

6.1 THE POWER OF QUIET

This trend explores the infamous and oft-touted "technology overload" that results in the need to detox, get away, and escape. Some of this sentiment was captured in qualitative research, with several respondents making reference to this trend:

"For those seeking true escape, there are special vacation packages or spiritual trips available in which they can 'cut off from the world'"

SAHRISH, TORONTO

"I actually plan trips to out of range locations, such as mountain destinations like Yosemite. I also love going to my son's country club for respite as cell phones are strictly prohibited in order to maintain the old world sense of privacy and time un-intruded by text buzzes and the swoosh sound every time an email is sent."

MALE, AGE 68, USA

Jason, a thirty-something professional took his wife and son to Australia last week, where he studied at the University a long time ago. "It is the slow culture that is so opposite to Shanghai , that I wanted my wife and my boy to experience and to let them see that I can be slow too, not always as in a hurry as I am working in Shanghai."

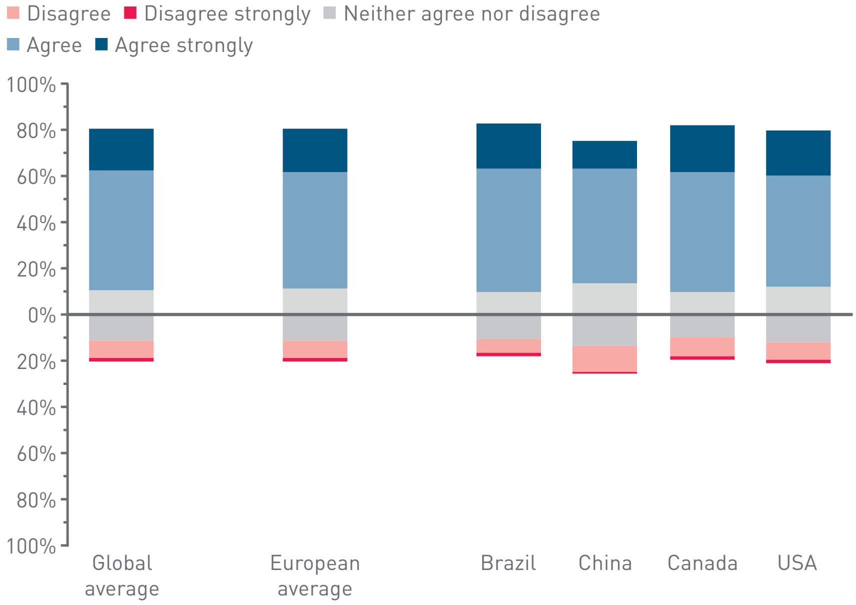
JASON, SHANGHAI

It seems that everyone has a device attached to their right hand and whenever it buzzes, it must be checked immediately. Additionally, I know a lot of teachers and am aware that in this day and age kids, while in class, think it is acceptable to pull their mobile device out and answer a text mid-lesson (meaning they do not understand technology boundaries). Even when rules are in place, the kids sneakily pull the phone out and text under the desk as if they are invisible and the teacher has no clue what's going on."

KELLY, SAN FRANCISCO

And on the surface the data seems to indicate that the idea of setting time aside for quiet moments - particularly "alone time" or time for self-care - holds widespread appeal.

"How strongly do you agree or disagree with the following statements? I make sure I regularly have some time with no commitments/nothing specific to do (e.g. no work or social commitments)" | 2015



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

ACTIONS SPEAK LOUDER THAN WORDS

Whilst agreement looks high, further analysis indicates that there is little correlation between agreeing to this statement and actual behaviour to support.

Those who strongly agree to this statement are actually far more likely to be doing a higher number of social commitments at high frequency than others. Of those who strongly agree, 1 in 4 are performing all four of the following activities at least once a week: going out shopping, eating out as an occasion, socialising out of home and socialising within the home. Of those who are apathetic or disagree, the proportion who are doing all four so frequently halves.

However, as deeper analysis in the commentary box reveals, this landscape has proven tricky for consumers to navigate. Despite high agreement levels to this statement, we do not see indication of follow-through.

CASE STUDY: Villa Stephanie at Brenners Park- Hotel & Spa

Villa Stephanie has many of the same features as other spa hotels, such as a fitness centre, sauna, pool and various massages and treatments. Its differentiating point is the opportunity to switch off completely from all things digital.

The rooms have been fitted with copper shields covered with a special coating, which blocks all high-frequency waves, such as Wi-Fi signals, disconnecting the room from electricity supply. Special cables have been used to reduce electro-magnetic fields throughout the building. This allows visitors to the hotel to 'digitally detox'.

Located in Baden-Baden, a spa town known for its famous healing waters, the spa provides other healthy options, such as a food menu, which can be adapted to any dietary requirements.

NOTEWORTHY STRATEGY?

With guests having the power to switch off signals, they can enjoy the quiet freedom of not being connected, as well as a more natural, restful sleep.

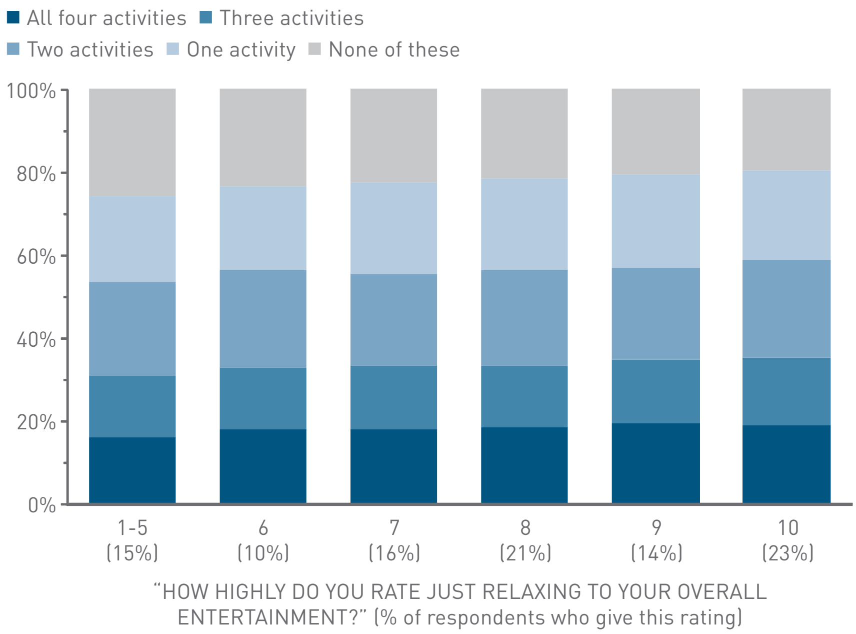
Each room contains switches to turn off individual signals, allowing visitors to choose when they want to be left in peace and which digital distractions they want to get away from. These switches facilitate the digital detox and empowers those consumers, for whom leaving digital demands at the doorstep proves a difficult task.

"In a world where people are connected practically around the clock, there is a need for places of retreat where it is possible to relax and focus on yourself. It is for these reasons that the Villa Stéphanie has been created."

FRANK MARRENBACH, MANAGING DIRECTOR OF BRENNERS PARK-HOTEL & SPA.

Similar results are revealed when looking at those who value "just relaxing" - an entertainment activity which we recall from **The End of Adventure** and which was the clear favourite across markets. The difference in the value of relaxation is not related to the number of non-relaxing activities consumers pursue at high frequency.

"How frequently do you do the following activities at least once per week? Go out shopping / Eat out as an occasion / Socialise outside of the home / Socialise inside the home" | % who do each number of activities within those who rate just relaxing as valuable to their entertainment at each score | 2015



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

NOT QUITE "JUST RELAXING"

Here, we have taken the entire global sample and grouped those who rate "just relaxing" as 1-5 in value together; this gives us a total of six groups, ranging in size from 10% to 23% (total proportion given beneath each group oin bracets).

As we can see, there is very little correlation between valuing relaxation and how many activities are pursued on a weekly basis. If anything, there is a slight correlation between those who value relaxation more highly pursing more activities by average.

From this, we can see that whilst relaxing and making time for oneself is not necessarily a widespread behaviour, it is nevertheless a clear aspiration - perhaps the former even enforcing the latter.

As with so many of the other trends we have seen, this is as much about how consumers would like to behave as it is about how they do behave, particularly in the context of what we have already seen in **Constructive Tourism** around self-improvement and health. The attitudes have formed the cornerstone of **The Power of Quiet** and the genuine value consumers are placing upon relaxation, detox and slow-down in all areas of life. At the same time, challenges from all areas are pushing consumers to do more and more with their already limited time, creating a deep sense of consistently failed aspiration that underpins this tension.

Further, when we consider the consumer's relationship with technology, this aspiration-behaviour gap provides a highly informative context. In the post-smartphone age, it makes sense that **The Power of Quiet** translates particularly heavily into consumer consciousness about their own constant technology use.

But as we have also seen across themes, devices are a particularly crucial part of the consumer experience from discovery to destination. Consumers may indicate that they would like a break from their smartphones whilst on holiday; however, paradoxically we have also seen that they are if anything more likely to use devices in situations that require planning, control or social engagement.

This begs the question: how much do consumers actually aspire to switch their phones off, and how far away is that from their current behaviour?

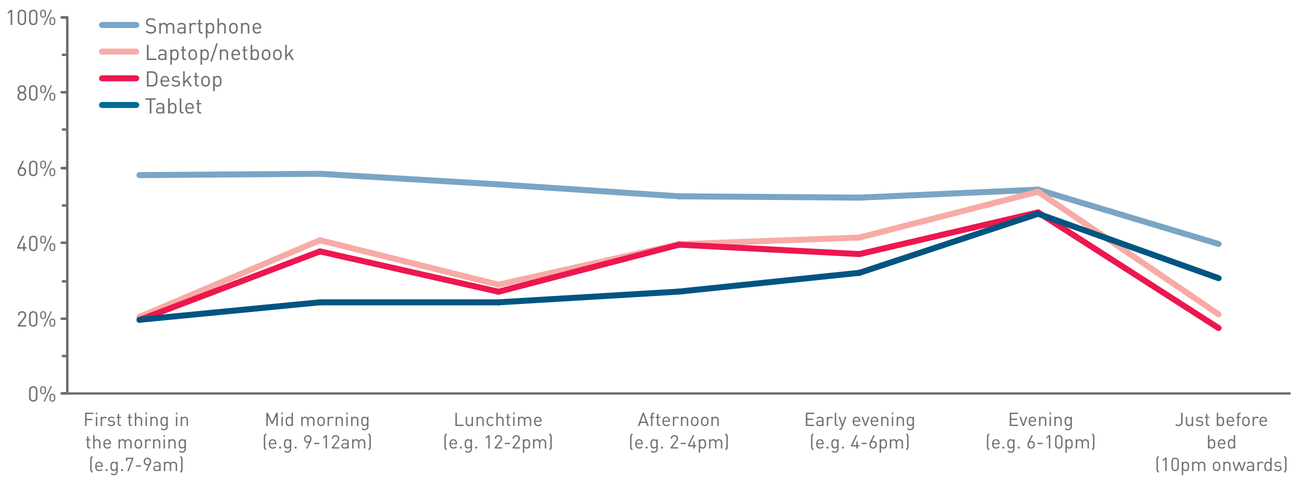
IMPLICATIONS: INSPIRATION & DISCOVERY

Realistically, only the most committed of digital detoxers will want complete disconnect from technology - we expect this to be a niche pursuit. When it comes to mainstream travel, however, consumers might appreciate opportunities for flexible yet explicitly-defined chances to put their smartphones down.

Thus, for tourist boards it will be particularly important to clearly flag the opportunity for escape that their destination could provide in the discovery phase - but also to make explicit that this is well within the consumer's own control. Equally, specific attractions, activities or events looking to capitalise on this trend, such as restaurants that ban smartphones, or accommodation that purposefully has no internet, might also do well by ensuring that consumers understand that the holiday is an opportunity for intense but ultimately temporary retreat.

It is almost impossible to quantitatively link aspiration to disconnect with frequency of using technology via self-reporting survey methods. However, a cursory look at global device use statistics gives a good initial indicator at exactly how prevalent device usage is throughout the average consumer's day:

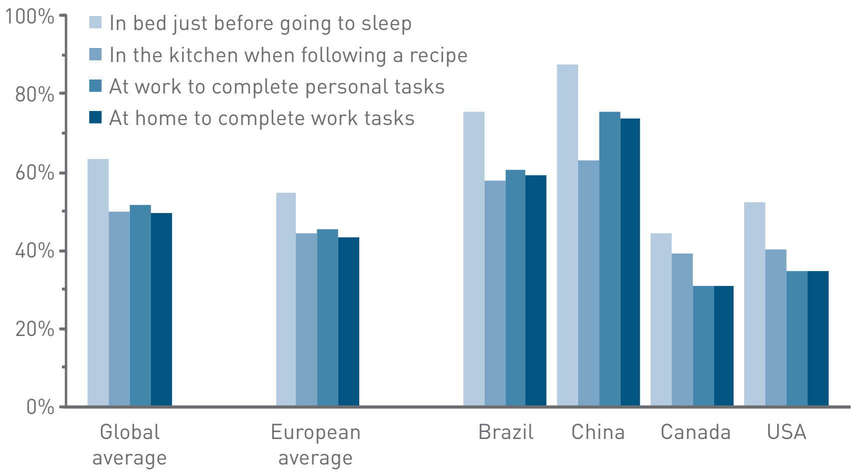
"At which times of day do you generally use the following devices?" | % who use each type of device | 2014



Source: nVision Research | Base: 1000-5000 online respondents with a smartphone, tablet, laptop and desktop per country aged 16-64 (Indonesia, Mexico & S. Africa 16-54), 2014

Other self-reporting device usage statements indicate that device usage is not only constant throughout the day; on top of this consumers stick to devices as they move from one activity to the next. Crucially, we can see how technology and potential stressors or feeling of digital overload might be strongly linked as well.

"In which of these situations do you use either a smartphone or a tablet?" | % who select each of the following | 2015



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

REGIONAL DIFFERENTIATION

Yet again, respondents from high device-owning populations are understandably more likely to be using them regularly.

Particularly interesting, however, is how even "at work to complete personal tasks" and "at home to complete work tasks" are within countries. We can see how constant use of technology is closely related to the erasure of work-life dividing lines - perhaps a good hint at why the tech-detox feeling is so strongly associated with other ideas of quiet and de-stressing.

Yet again, it is difficult to determine whether or not this behaviour and the anecdotally observable technology overload could realistically result in demand for tech-free escapism - or if this data itself proves that people are more dependent on technology than ever before.

Unsurprisingly, the answer is most likely to be mixed. Our qualitative research addresses this reveals a clear tension - but one which looks to be short term, and is unevenly spread across the board.

From the USA, Canada and China, we see evidence of desire to disconnect - but a desire which comes with a lingering feeling of compromise or wanting to have it all. Looking at the response from China, there is some indication that there may be practical barriers which prevent pursuit of quietness as the competing need for security far outweighs it:

"I think that, over the past few years, awareness about how pervasive technology is has grown [so] I do think that travelers in the US are becoming increasingly interested in taking off the grid trips to disconnect in whatever ways they can, which definitely has an impact on the kinds of trips they're seeking out and the things they want to do there. There are also a number of apps like SelfControl, which consumers employ to purposely block themselves from accessing social media and any other websites/apps."

ANNABELLE, NEW YORK CITY

"I dream of a trip where I could just not even turn my phone on for a week, but I don't think I'd be capable of actually doing that for more than, like, two days. How depressing."

FEMALE, 26, USA

"If going for escapist travel, people will be out there getting away from technology. But if you're tech savvy, it's a little more difficult to just 'turn off'."

TRAVEL AGENT, CANADA

"The last trip I took, we could barely find any Wi-Fi and it was actually incredible. It's just so much easier to disconnect when it's out of necessity."

MALE, 29, USA

"I can relax on the beach but lying there doing nothing is not fun. I need to keep busy, even if it's something as simple as playing a puzzle on my ipad!"

FEMALE, 65, RETIRED, CANADA

"Many Chinese will go on domestic trips just to disconnect from their city and digital world. However, while abroad, in order to make travellers feel confident being disconnected and enjoy the peace, I believe the key is to first make the travellers feel safe and at home, give them the feeling they can reach out for help at any moment if they wish or need."

XIAOLEI, SHANGHAI

And from other markets, we see scepticism towards the longevity of the concept or its rejection all together. Notably, respondents from Brazil outright denied the appeal of disconnecting:

"Brazilians are still fully embracing technology. I asked [a travel agent friend] about the search for destinations that promise the traveller complete isolation from technology and he told me that's almost zero."

TIAGO, SAO PAOLO

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, BRAZIL

"The more technology driven society becomes, the less likely I see escapist travel becoming popular in the coming years ... As mentioned before, most Canadian travellers like to, in fact, use technology to plan and book their trip, and sometimes use it during. It's only the eldest generation that can be said is not completely addicted to technology."

SAHRISH, TORONTO

People say they want to escape, but they don't really. The majority of Chinese people don't like being quiet and disconnected."

CARRIE, SHANGHAI

Consumers in the US are hyperaware of how reliant we are on technology for our day-to-day life and especially for traveling, but even though we complain about it, we are reluctant to disconnect. The number of people who seek to disconnect or take technology detoxes is increasing, but the follow-through in my market doesn't seem strong

ANNABELLE, NEW YORK CITY

This mix of consumer sentiments indicates that, in the short term, there is some consumer appetite for a temporary disconnect - although complete rejection of digitalisation is highly unlikely, and even less so as time goes on.

The travel industry's place in this journey is also revealed: for those consumers who do crave this short-term disconnect, it may not be such an easy feat. External support their attempt to get off the grid would not only be appreciated, but perhaps even requested.

IMPLICATIONS: IN-DESTINATION

We posit that there are consumers - particularly from North America - who will appreciate creative, well-balanced commercial propositions that allow them to escape. In this transitionary era where many have memories of a so-called "simpler time", there is a true and inevitably present mental and emotional demand for switching off, coming from a significant minority. Helping consumers, who would like to satisfy this need, is not a question of if but how.

Ultimately, enabling consumers to get away from technology will require a certain preemptive response to various consumer needs that their personal technology would otherwise address. Smartphone-based translation services could be replaced by better pre-translated information available; the compulsion to take photos via smartphone throughout a journey could be replaced by novelty disposable cameras (as seen below with London's Secret Cinema).

CASE STUDY: Secret Cinema

The Secret Cinema is a cinema hosting well-known popular films, such as Back to the Future, Dr Strangelove and The Shawshank Redemption. Every event is a fully immersive and participatory screening, making use of mixed media and featuring live performances from actors.

As the name suggests, many details of events hosted by the cinema are kept a secret until the very last moment, with ticket holders often finding out the location of the event earlier on the day of the screening. All ticket holders receive a new identity and are asked to dress up, allowing for full anonymity when participating in tasks, such as trading and bartering with others, which are the key to progressing to other sets and scenes. Thus, ticket holders do not know if they are engaging with an actor or a fellow participant and attendees becoming a part of the show.

NOTEWORTHY STRATEGY?

With the tagline 'Tell No One', the company operates a strict policy regarding media, with all mobile phones either being left at home or being handed in upon arrival. As many films shown are set in the past, the "no phone" policy enables the completely immersive experience, as nobody is continually checking their phone; it also facilitates and encourages enjoyment of what is happening in the moment, instead of being focused on technology and trying to capture the experience.

The mystery surrounding the events are not only part of the brand's identity but it also guarantees that the surprise is not ruined for others attending on different nights.

In an age of downloads, on-demand viewing and online streaming, Secret Cinema offers a uniquely disconnected experience.

"We're trying to challenge the audience and to experience something different. We don't know how they're going to behave. It also shocks me how much the audience actually want to participate and create. I think the principles of bringing films to life and allowing audiences to step inside, live and become the film are still there. However we're moving it into new areas and it's becoming more detailed and more ambitious with each project. The audience is getting to be more creative and interact on various levels."

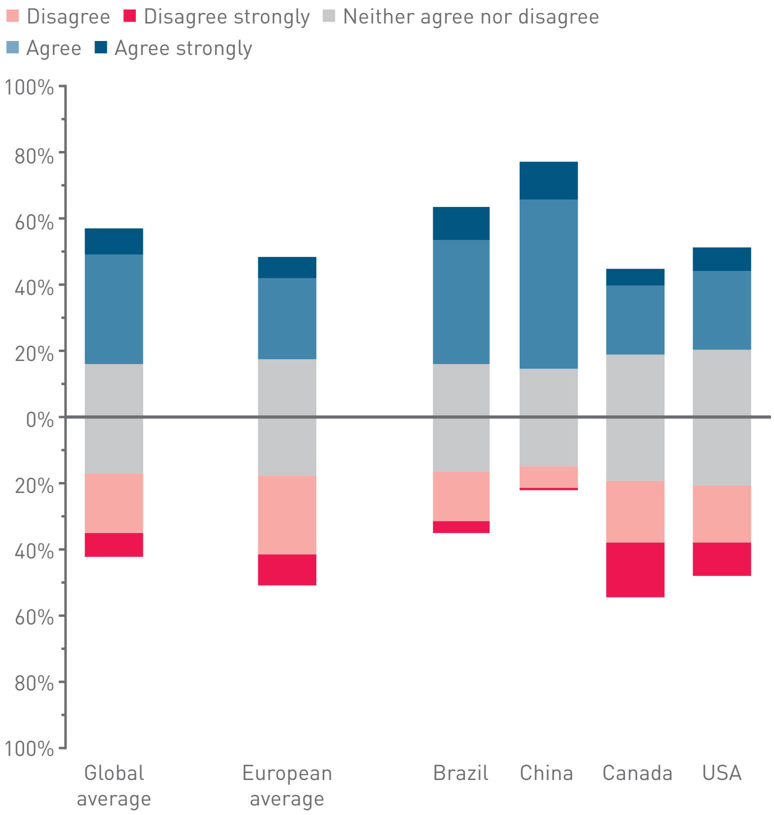
FABIEN RIGGALL, FOUNDER

6.2 CASUAL CONNECTIVITY

Acknowledging that consumers are ultimately unwilling to give technology up despite all the stress it may cause them occasionally, in this section we attempt to identify a more precise take on this underlying feeling of being overwhelmed. Rather than the demanding nature of technology being the primary stressor, however, we hold that it is the current absense of mechanisms to control and manage this pervasiveness.

We see that approximately 40% of global respondents either agree or agree strongly that they would like to be able to better control when they receive notifications. But when we look at regional differences, we find that those who feel the most out of control are not the least tech-savvy - it is in fact the exact opposite.

"How strongly do you agree or disagree with the following statements? I would like to be able to better control when I receive notifications on my mobile phone" | 2015



REGIONAL DIFFERENTIATION

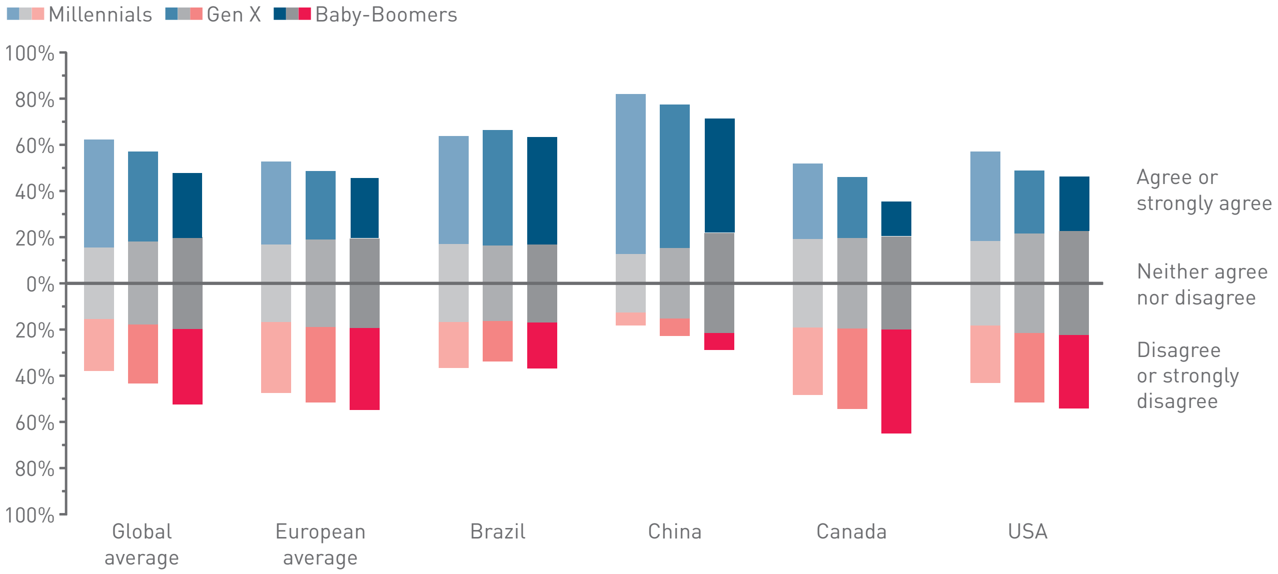
Americans and Canadians seem to be the most intrinsically satisfied with the level of notification control they have. In Canada in particular, we see an unusually large proportion who strongly disagree; as seen in the next chart, this may be due to the particularly strong sentiment held by Baby-boomers that they are firmly in control of this.

But this is particularly interesting in comparison to China, where there are few who do not feel this is a pain point - despite high levels of digital nativity. This suggests that high topline volumes of people who would like to better control notifications are not those who are less tech-savvy and thus unused to receiving them; in fact, they may be the most tech-savvy worldwide, indicating that it is at least partially a question of technology not meeting human needs.

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

When we look at age differences, we see a similar effect at play: a total polarisation, where Millennials are extremely likely to agree or agree strongly, whilst Baby-boomers are likely to disagree or disagree strongly.

"How strongly do you agree or disagree with the following statements? I would like to be able to better control when I receive notifications on my mobile phone" | 2015



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

This confirms that global weariness surrounding technology is not driven by those who remember an idealised, pre-internet, pre-smartphone past[1]; nor is it likely to be driven by those who are unfamiliar or unable to use connected technology properly. In reality, it is far more intuitive: the more one uses a smartphone, the more a smartphone will feed them notifications, and the more difficult it is to manage and control.

Thus, **Casual Connectivity** is the resulting consumer trend: the need for technology that follows life just as pervasively - but without ill-timed or inappropriate interruption.

CASE STUDY: hub Hotels app for Apple Watch

Premier Inn's tech-focused range of hotels, hub Hotels, launched an Apple Watch app to equip their guests with a new set of functionalities. The app allows consumers to check-in using their watch, as well as to use it as a room key.

The wearable also allows users to control various features of their accommodation, including lighting, heating and Smart TV. The app has a "do not disturb" button, which lights up the sign outside the door without the guest having to get up.

Users can also check the breakfast menu from the app, as well as order food from the cafe.

NOTEWORTHY STRATEGY?

The app allows travellers lodging at a hub Hotel to stay connected during their visit and provides an easy check-in process for busy business travellers.

Having an app on one's watch or phone, a device which hardly ever leaves a traveller's side, allows them to easily accessing any tools they need, such as heating or lighting, without having to move.

The app also suggests things to do in the area, places to eat and drinks and even has an augmented reality function, which helps travellers unfamiliar with the area to easily find their way

"Whether it's for business or pleasure, the way we choose to travel and experience a city is changing. Apps are already revolutionising the way we order our groceries, book taxis, and check-in at airports, it was only a matter of time before the hotel experience followed suit."

SIMON EWINS, BUSINESS DEVELOPMENT DIRECTOR FOR WHITBREAD HOTELS & RESTAURANTS, PREMIER INN'S PARENT COMPANY

1. See section 1.3 for technology use between age groups

Of course, many of the barriers to the **Casual Connectivity** future are infrastructural: our current technologies are simply not advanced enough to follow human intuition. But as tech innovations, such as wearable devices, are beginning to build a momentum and generate consumer excitement,this will soon turn into expectation - and the appetite for **Casual Connectivity** from all markets is visible through our qualitative results:

"None of those high tech [unobtrusive] services are close to coming to Brazil, but when they do, they'll be properly embraced by Brazilians."

TIAGO, SAO PAOLO

"[This trend] will further grow in the next 5-10 years, especially as these trends and integrative/non-intrusive technology ideas develop."

KELLY, SAN FRANCISCO

"Currently, digitally sharing the holiday experience is also huge, so how to balance the idea of live broadcasting / sharing with escaping connectivity would be something interesting to explore more."

XIAOLEI, SHANGHAI

"last time we travelled we went zip-lining and had a GoPro to wear on our helmets, which was so cool!"

FEMALE, 33, USA

"I think [this] is quite developed in my country, because of the ever-increasing amount of available gadgets, apps etc that attempt to seamlessly integrate tech into our lives in a less interruptive way. I suspect it will be trend that will continue to grow most, as human beings only continue to rely more and more on technology as a means of survival."

ANNABELLE, NEW YORK CITY

As this trend matures, we will ultimately see the decline of the need for retreat from the world of technology and connectivity.

IMPLICATIONS: JOURNEY

We have already seen how important technology is for travellers when they are on the way to their destinations - or when they are trying to navigate their itinerary once there.

This may be one of the best targets for casually connected services: real-time notifications nudging people at airports when boarding gates open rather than automatically alerting them an hour beforehand; maps which integrate with wearables to passively give directions to city explorers, who can then be liberated from having their noses glued to devices without fear of getting lost.

And ultimately, this area is one that shows some of the greatest levels of innovation at the moment; we are already seeing precedents in the form of smartphone boarding passes which pare down the level of interruption to normal consumer habits, or beacon services that push alerts within airports. For National Tourism Organisations and travel providers who are in a position to invest in the future, this could be a fruitful target area for innovation and collaboration.

CASE STUDY: Narrative Clip 2

The Narrative Clip 2 is a new photo-taking solution for the social traveller, who nevertheless finds constant phone or camera usage intrusive. Clipping to the wearer's body, the camera then takes photos at regular intervals which can be set by the user, allowing them to put their camera down for all but the most important moments.

Wireless uploading give users the freedom to view their images and post them on social media, whilst the interchangeable mounts allow the clip to attach to a variety of objects, even being able to a dog's collar, for a different perspective on activities.

Consumers can enjoy each and every moment, whether it be a more unassuming time or a grand adventure, with no need to pause and think about capturing it, as the device automatically captures all moments. The time lapse mode enables users to sit back and relax, whilst the Narrative Clip 2 captures an events such as an evening of beautiful sunsets or a wedding.

In the brand's own words, the camera was designed around its wearability - prioritising its small size, lightweight nature and aesthetic compatibility.

NOTEWORTHY STRATEGY?

The Narrative Clip 2 is ultimately marketed as being a casually connected tool - always there in the background, being customisable to style and lifestyle.

The device has some similarities with a GoPro, as both are durable wearable cameras. But the Narrative Clip 2 is pitched as a much more mass market -viable option, with an emphasis on being unobtrusive - not only in design, but also in the way it functions and attaches to the wearer. Rather than being a statement in itself, its proposition, marketing and strategy are all about allowing consumers to make it as much or as little of a statement as they want it to be.

"[This] is one example of a device that enables us to document our travels without being interruptive, as it's highly portable and can be worn on your clothing, automatically snapping photos at a preset pace."

ANNABELLE, TRENDSPOTTER, NYC

6.3 IMPLCATIONS FOR TOURIST BOARDS

NTOs and visitor attractions must aspire to be at the forefront of the debate about the role of technology in ordinary lives. In the short-term, this is about recognising consumer boundaries, allowing easy opt-outs from communication channels, or switching to an opt-in model. Longer term, it is about keeping up with digital innovations that will make technology more sensitive and responsive to people's lives.

SHORT-TERM: ALLOWING DOWNTIME

We recommend that:

1. NTOs need to respect some consumers' needs for privacy and downtime. Targeting information should only ever be permission-based and could include additional layers of consent e.g. how to notify, when to communicate, what to provide.

2. Visitor attractions and hotels with a distinctive "digital detox" offering need to work fast to maximise the return they enjoy from a consumer need that will not last long; however, this must of course be tailored to suit each market and age group. We hold that this aspect in particular will more likely appeal to North Americans and middle-aged to older groups.

LONGER-TERM: MAKE CONNECTIVITY CASUAL

We recommend that:

1. NTOs need to be aware of the rise of casual connectivity, both in terms of demand and supply, and the consequent decline in appeal of digital detox options. There will come a time when technology gets so much better at knowing when to interrupt us, that the need for digital detox will vanish.

2. NTOs with physical locations (eg Tourist Information Centres) should look to leverage Internet of Things connectivity and visitors' data streams to proactively offer content, advice and information without being asked.

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.

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