The Future Travel Journey
Trends for Tourism Product Development
Introduction by VisitEngland

I am delighted to introduce VisitEngland’s new report, “The Future Travel Journey”

The three-year £40million Discover England fund, announced by Government in 2015, is intended to ensure that England stays competitive in the rapidly growing global tourism industry, by offering world-class English tourism products to the right customers at the right time.

Product development is a long-term process, and the products supported by the Fund will continue to serve visitors into the next decade and beyond. For this reason, it is vital that we understand consumer needs and the factors affecting these, not only as they are today, but as they will be in the years to come.

In order to do this, we have commissioned the Foresight Factory, a leading trends consultancy, to help us identify the trends that will influence consumer travel behaviour in future. They have drawn on their own data and interviews with experts and trendspotters in the UK and overseas to produce this new report.

The report looks at some of the macro trends affecting consumer behaviour before going on to consider specific trends relating to four key areas – inspiration and pre-planning; the booking process; connected travel, and evolving travel needs. In each section, you will find an explanation of the trends, the data that supports them, and some real life examples of how different organisations are taking advantage of the opportunities they offer.

We have also separately produced a presentation toolkit, which can be downloaded from our website (visitbritain.org/product-development-research) so that you can use this information in your own workshops and presentations.

We hope that you find this report both useful and inspiring for your own product development work, in 2017 and beyond.
Introduction

In 2015, Government announced the three-year £40 million Discover England Fund, a project aimed at delivering world-class English tourism products in order to grow inbound international travel to England.

Tourism is a booming industry in England in terms of job development and economic growth alike, with record tourism spend documented in recent years for both domestic and international travellers. However, there is still significant potential for future growth, not just in the capital but also in England’s regions, where of the £19.7bn spent in England in 2016 by international visitors, regional spend accounts for less than 40% of the total – especially in a context of travellers becoming more sophisticated in their demands, and expecting a more versatile tourism offer at their destination of choice.

While the scope for new tourism products that can drive international travellers to the other regions of England is considerable, their success will strongly depend on how well they fit in with current and in particular future consumer demands, attitudes and behaviours. In this report – which is based on trends expertise, robust data, real-life case studies, as well as opinions from tourism experts and traveller insights – we will outline the most important consumer trends to watch and highlight key nuances between demographic groups, which tourism products need to integrate into their design and development to be successful.

The trends we have selected are already relevant today but most importantly, will have a significant impact on how consumers will approach the travel journey in the next 5-10 years.

After the report opening with a snapshot of the changing traveller landscape based on key structural societal shifts, we have organised the trends covered by how we expect the consumer would organise their journey; starting with inspiration and pre-planning, before moving on to the booking process, how travellers stay connected on their trip, and how their needs are evolving and affecting the tourism experiences on offer. For each section, we have outlined key implications and action points for English tourism products against the 5-10 year horizon.

Please note that we have also developed a toolkit to go with this report. This document includes presentation-version slides of the report, cards with future-proofing questions and more useful features to use trends effectively in the development of your tourism product.

Additional insights

Expert Interviews

We spoke to 4 industry experts to discuss the trends covered in this report.

- Robert Sinclair-Barnes, Strategic Marketing Director At Amadeus IT Group
- Nick Larson, Head Of Platform At Timelooper
- Jo Reid, MD At Calvium
- Ian Yeoman, Tourism Futurist

Trendspotter Interviews

Foresight Factory maintains a network of trendspotters around the world, who serve as cultural observers and provide insights on consumer trends in their particular markets. When building this report, we consulted the network to achieve a better understanding of local nuances and bring the trends to life.
A Changing Landscape...

Before we move on to outlining the consumer trends that will affect the development of tourism products in the next 5-10 years, we believe it is helpful to outline the context of the market in which consumers find themselves and the societal shifts that will occur.

Economy

In the light of the recent downturn and sustained economic turbulence, it can be easy to lose sight of the longer term trend that has seen global affluence rise at an incredible rate in the post-war era. The middle-class will continue to grow in size across the world, leading to higher demand for tourism from middle class consumers.

Globalisation

Global access to international media, food and brands has driven cultural and commercial change. Consumer choice has exploded as the world has become one huge bazaar where anything can be marketed, bought or sold online, without borders or limits. Inspiration and trendsetters are international and inspire travel to the source of foreign cultural influences and products. In this global context, national protectionism has gained political traction and some western countries perceive a crisis of identity in a homogenous western society – but identifying distinctive qualities and experiences tied to a destination make it stand out in the milieu.

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When travelling, I like to immerse myself in the culture and feel like a local

% who agree or agree strongly | 2016

Decisions and Influences Research, VB/Ipsos 2016 | Base: 8400
Connectivity

Connectivity is a significant factor in the process of consumers deciding where to take a holiday. According to The Office for National Statistics, out of the top 10 countries with the most inbound passengers into the UK in 2015, 8 are European.

Geographical proximity is the main factor for the number of European visitors to the UK and connectivity is key when considering inbound visitors from long-haul destinations. The UK has more than twice as much seat capacity on direct flights from the US than any other long haul market – and the US is also the UK’s second biggest tourism market in numbers of inbound passengers, second only to France.

The top 10 countries for number of inbound passengers to the UK in descending order:
France; USA; Germany; Ireland; Spain; The Netherlands; Italy; Poland; Australia and Sweden.

2015

Seat capacity to the UK on direct flights (000s)

<table>
<thead>
<tr>
<th>Country</th>
<th>2006</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>10,000</td>
<td>12,000</td>
</tr>
<tr>
<td>UAE</td>
<td>6,000</td>
<td>8,000</td>
</tr>
<tr>
<td>Turkey</td>
<td>4,000</td>
<td>6,000</td>
</tr>
<tr>
<td>Canada</td>
<td>2,000</td>
<td>4,000</td>
</tr>
<tr>
<td>India</td>
<td>1,000</td>
<td>2,000</td>
</tr>
<tr>
<td>Singapore</td>
<td>500</td>
<td>1,000</td>
</tr>
<tr>
<td>China</td>
<td>100</td>
<td>200</td>
</tr>
</tbody>
</table>

Source: Apex

Also within the country itself, infrastructure will remain a key criterion for the success of English tourism. Connectivity between international locations and various destinations within England has improved significantly over the past decade, but transportation within the country can be a barrier for international audiences. A lack of knowledge of UK geography and transport networks combined with reservations about driving on the "wrong" side of the road can combine to discourage travel, making it important to ensure that visitors know how best to access product/destinations outside the capital.

All Nippon Airways (ANA) created an in-bound campaign to encourage tourism to Japan, offering an international flight for travellers with complimentary internal transfers as part of the package. This would be equivalent to international travellers flying into London, seeing London for a few days with a complimentary option to fly you to Manchester or Leeds or Glasgow to explore another part of the England, before returning via London to fly back to your original departure destination.

This was very smart and encouraged international in-bound tourism across Japan, without impacting Japanese domestic traveller sales, plus bringing travellers to visit various parts of Japan, not just to Tokyo.

Robert Sinclair-Barnes, Strategic Marketing Director, Amadeus IT Group

Precarious Living

A zeitgeist of uncertainty and precariousness hangs in the air. 2016 was a year in which populism became popular and electorates developed a taste for anti-establishment and isolated protectionism. We think it would be wrong to assume that politics will simply snap back to normal, with the very real threat posed by anti-establishment parties in the heart of the EU.

A Eurobarometer study showed that while Europeans, in 2016, still considered unemployment the top issue facing Europe, concerns about immigration and terrorism had been growing significantly compared to when the same question had been asked back in previous years. In 2012, 2% of Europeans believed terrorism was the most important issue facing Europe – in 2016 this was 16%.
Furthermore, only 3 in 10 global consumers claim to have confidence in the state to provide financial support when at retirement age*. Societal norms and expectations have been relegated to yesteryear and the fate of individuals in this global narrative is perceived to hang by a thread.

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

% saying that the following is one of the two most important issues | EU28 average | 2016

- Unemployment
- Immigration
- Economic situation
- Health and social security
- Terrorism
- Rising prices/inflation
- Pensions
- Government debt
- Crime
- Education system
- Housing
- Taxation
- Environment, climate and energy issues

Case study
In January 2016, the Brussels tourist board introduced the #CallBrussels initiative in a bid to combat the negative press it received following its 4-day lockdown in November 2015, which was the result of terrorist threats. Telephones were set up in 3 different locations across the Belgian capital, including the troubled Molenbeek neighbourhood. People from around the world could dial in via the website to speak to Brussels’ locals who were walking past the telephones and happy to pick up and answer.

Demographics
The Ageless Traveller

The face of the global consumer landscape is rapidly evolving as developed markets become aging societies. This is changing consumer behaviour, causing individuals to delay major milestones until later in life, or to repeat them and to live in more mixed generation or solo households. As people are living longer and more active lives, while adhering less and less to a traditional order of key lifestages, it is becoming less relevant to think about travellers in terms of their age and more in terms of their interests.

Global spending power of those aged 60+ is forecast to reach $15tn USD.1

The number of people aged 60 years and older will outnumber children younger than 5 years.2

According to the UN, in 2040 Europe will become the first continent where the proportion of citizens under the age of 24 will be smaller than the proportion aged over 65.4

The global middle class will increase to 4.9bn. Asia will represent 66% of the global middle class and 59% of its consumption.3

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By 2050, the proportion of the world’s population aged 60+ is expected to nearly double from 12% to 22%.5

Case study

2015 saw tour operator the Globus Family of Brands launch a new campaign, Time to Tour, specifically targeting Boomers. The video ad is centred on a new vision of retirement, in which, after the children have left the home, consumers have the chance to explore and experience the world, rather than simply retire. The video is narrated by a couple’s fictional daughter, who addresses her parents, saying that it is about time they followed their own travel wishes and let someone take care of the hassle.

The Solo Traveller

It used to be the case that in most consumers’ lives periods of solo living were concentrated in young adulthood and later life. However, today, as lifestages become more flexible and traditional milestones like marriage get shuffled, postponed and even repeated, consumers are experiencing living on one’s own across any number of points in their life - bringing with them all the related consequences of single living into their leisure activities.

% of solo households per country

<table>
<thead>
<tr>
<th>Country</th>
<th>% of solo households</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>32%</td>
</tr>
<tr>
<td>USA</td>
<td>27%</td>
</tr>
<tr>
<td>Sweden</td>
<td>41%</td>
</tr>
<tr>
<td>France</td>
<td>37%</td>
</tr>
<tr>
<td>UK</td>
<td>26%</td>
</tr>
</tbody>
</table>

Travelling solo is one of the fastest growing categories, and travel brands can open up a lot of potential by tapping into this commercial niche. A proliferation of offers, services and networks will make travelling by oneself even easier and more enjoyable. Solo adventures are firmly positioned as enriching opportunities for self-discovery, which ties in with some of the consumer trends we are discussing later on this report (e.g. The Leisure Upgrade).
Consumer trends transforming the travel journey

1. Inspiration & Pre-planning
   - Maximising Behaviour
   - The Death of Risk

2. Booking Process
   - Conversational Commerce
   - Impulsive Existence

3. Connected Travel
   - Locational Living
   - Performative Perfection

4. Evolving Travel Needs
   - Pursuit of Real
   - The Leisure Upgrade

- Mastering the Mind
- Customised Reality
1. Inspiration & Pre-planning

Travel has always started with inspiration, but where this stimulus comes from continues to be redefined. Though we are now connected online to an immense range of different sources and voices, there is a growing sense that the types of recommendations we receive has become narrower. In this section, we explore why travellers do not necessarily experience this as a negative evolution.

Once inspiration has materialised into a decision to travel to a specific destination, an increasingly complex pre-planning process follows. Consumers are risk-averse in a range of different ways and want to maximise the value they get for their money and how they spend their limited holiday time. This considered approach results in a pre-planning journey which is now longer than before.

Filter Bubble

Despite the endless resource offered by the internet, future travellers will live in a filter bubble created by personalisation algorithms and homogenous social networks. Tourism products will have to work hard to stay on the traveller’s radar.

Maximising Behaviour

Value, for future travellers, will be about more than price. They will opt for trips that allow them to collect as many unique experiences as possible on their journey, without having to invest considerable time and money in getting about.

The Death of Risk

With limited budget and holiday time available, future travellers want to find out as much as possible about their destination before getting there. They expect travel providers to empower them by providing enough upfront information about tourism products.
Filter Bubble

Influence and inspiration today comes from a range of different places: traditional travel guides, review sites and apps, pop culture (TV, film, literature…) the feeds of social influencers, as well as our own friends and family.

“Television is a source of inspiration too, many people I know now wish to see Iceland because parts of Game of Thrones were filmed there, or go to Oregon because Wie is de Mol? [a popular TV show in the Netherlands] was shot there.

Female, 27, Netherlands

While in many ways travellers have access to a wider range of sources of inspiration than they did ever before, the growing level of personalisation of content has limited the diversity of information that is reaching them.

The best way to navigate otherwise often overwhelming review sites is to filter down results by the same trusted criteria time after time. Travel companies are using algorithms to target consumers with more personalised recommendations (over 6 in 10 global consumers show interest in a service that suggests a holiday or itinerary based on their interests and budget), leaving out results outside of the traveller’s comfort zone. Even the social influencers and people we actually know and follow on social media or hear from through word of mouth are in many cases very similar to the traveller we are or aspire to be.

“How interested would you be in a service that suggested a holiday and itinerary of activities based on your interests and budget” | % who are very interested or quite interested | Adjusted data | 2016

Source: FF Online Research | Base: 1000-5000 online respondents per country aged 16-64 (Indonesia & S. Africa 16-54), 2016 February

However, we do not expect consumers to necessarily see this as an unwanted development. Getting recommendations that are based on our own positive experiences and on those of people we trust and identify with, fits in very well with the risk-averse mindset we describe in this section of the report. In particular as fewer travellers rely on travel agents or travel packages, this appears to be a safer route to choose.

“Obviously I get less of wide range of different things, which is a good thing – I trust my friends and influencers more than I trust Lonely Planet. You trust your friends, simply because their only agenda is for you to have a good time. I certainly end up experiencing a lot of similar stuff, but then again I know what I like and that’s what I want to do and enjoy when I go on holiday.

Female, 27, Sweden

For tourism products to beat the filter bubble, they need to ensure they are part of consumer conversations, endorsed by social influencers, and ticking the boxes of relevant criteria in a bid to come up in algorithm results. The latter implies that instead of trying to be too catch-all, tourism products should be clear on which target group(s) and niche(s) they want to address.

Case study

The Canadian Signature Experiences® (CSE) collection is a qualified set of Canadian visitor experiences that best exemplify Canada’s tourism brand. The role of the collection is to capture the attention and imagination of consumers of Discover Canada’s three target market segments and motivate them to travel to and within Canada. The collection is based on unique
and exceptional travel experiences that are engaging and immersive and provide the opportunity for the target segments to discover, learn and enjoy Canada in ways that are personally relevant and aligned with their motivations to travel.

The experiences are submitted by businesses and organisations involved in tourism and, to qualify, must meet a range of mandatory criteria, appeal to one or more key market segments and be aligned with the country’s brand and unique selling propositions.

Case study

**Helsinki Secret Residence** invites social media influencers on a trip to Helsinki. All chosen influencers are greeted with a welcome pack and are put in touch with local bloggers to make the most of their experience.

Another way to increase exposure in this narrowing landscape is to package existing products around current trends, as VisitDenmark have done in the following example.

**Case study**

**VisitDenmark** have cleverly picked up on the buzz around “hygge”, the traditional Danish concept of cosiness, warmth and togetherness that more recently has become a global phenomenon. On its website, it advises travellers on coffee shops, streets and other attractions that display the essence of hygge, while also dedicating a section to how UK travellers in Copenhagen have captured hygge via their Instagram profiles. By appropriately stamping more locations as hygge, for example by using the #hygge hashtag, travellers are more likely to find out about unique Danish attractions and experiences.

Popular bloggers, vloggers and other social influencers are becoming powerful sources of inspiration for holidays. This is where brands can get involved beyond creating content to push in native spaces and instead create sponsored posts from key influencers. Emerging markets are clearly leading the way when it comes to utilising social influencers, as consumers of all ages are following blogs and vlogs for relevant info – but Western countries such as the US, UK and Sweden are catching up soon.

“I enjoy watching online videos created by video bloggers”

% who agree or strongly agree | Adjusted data | 2015

![Graph showing the percentage of people who agree or strongly agree with the statement.](image)

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

While quite some time has passed since the global downturn, its impact on international travellers’ mindsets has not completely faded. The hangover of the recession, combined with the vast array of price comparison tools at our disposal, have resulted in a maximising type of traveller, who takes pride in finding a good value deal and is prepared to spend significant time looking for the best option.

“For many young travellers, price often literally is the starting point. They regularly check airlines’ websites or aggregator tools like Skyscanner for remarkable deals and decide on trips based on what they find. The money saved through this approach results in more budget for the next break, usually soon after.”

“Value is a concept that appears to broaden with age. Once travellers have a family to care for, comfort inevitably becomes a key factor that trumps price at least to some extent. Many will also increasingly look at additional services that may warrant a premium. Older travellers are also less likely to fuss about money, as they have already spent a lot of their youth compromising on price and have, in many cases, accumulated a fair bit of wealth.”

Case study

Ireland’s tourism development authority FáilteIreland implemented the Wild Atlantic Way as a large-scale programme to increase substantially the economic contribution of tourism to the Atlantic coast. The Wild Atlantic Way is Ireland’s first long-distance touring route, stretching from Donegal to West Cork. Supported by a substantial programme of infrastructural investment and experiential product development, the project is creating an ‘experience brand’ designed to achieve greater visibility in target international tourist markets. The Way has been devised to present a compelling proposition for international markets -seeking to achieve a level of market impact that individual destinations would be unable to achieve.

While travellers are generally thrifty when it comes to booking flights and other sources of transport, there is a clear willingness among people to spend more on unique experiences and activities once arrived at their destinations. Seeking value means choosing destinations which pack in as many great experiences as possible in a single trip, meaning it makes sense for individual cities, villages or experiences with common ground (e.g. a shared history, characteristic nature...) to club together and build a shared, more desirable and versatile product.

Multi-city travel tickets for public transport have a great opportunity to address this mindset as they can not only highlight the opportunity to save money on getting from A to B, but also the doors they open to a wide range of new experiences in one go. Consumers are also keen to understand which unique attractions exist that have something different to offer, but are easy to reach from their base destination.
Case study

The Stockholm Outback tour is aimed at travellers who are visiting Stockholm but also want to experience Sweden’s famous nature without having to travel too far. Its destination is a nature reservation located only 30 minutes out of the capital’s centre. The 3 hour tour is in first instance focused on spotting wild animals such as moose, wild boars and deer, but also takes participants on a long walk through the woods and includes a short coffee break by a beautiful lake.

Going forward, we believe the Maximising Behaviour trend will become more about personalisation, i.e. about tourism brands understanding how each consumers defines value (convenience, unique experiences, etc) and offering or even negotiating packages and discounts based on this.

“When shopping online I would like to be able to negotiate prices with suppliers”
% who agree strongly or agree | Adjusted data | 2016

Case study

GO City Card is an attraction pass service available in a wide range of US cities. The service lets users opt for an all-inclusive access pass or allows them to build their own. All-inclusive passes are already built around specific themes (e.g. travellers in Boston can choose between the Boston Winter Fun Pass, College Museum Special or Top 5 Attractions pass), but travellers with a more diverse range of interests may choose to customise their pass completely and pick the specific attractions on which they wish to receive a discount. The benefits of using a GO City Card go beyond reducing cost, as the system also means visitors can go straight to the gate and skip the ticket line.
The Death of Risk

A side effect of the maximising mindset, today’s travellers are highly aware of the limitations of the budget and holiday time available to them – and are increasingly averse to any risky decisions that may result in less-than-optimal travel experiences. Some very young travellers may still romanticise the idea of a totally spontaneous holiday, yet even Gen Y consumers spend a lot of time planning their travels and are happy to sacrifice true adventure and surprise to ensure a great trip.

“When I plan a trip abroad, I find out as much as I can about the destination before I go”
% who agree or agree strongly | Adjusted data | 2014

Case study

Itineraries and tours are a great way of ensuring that a consumer does not miss out on any highlights. The Margaret River Region, which has built a distinct local brand around its wine and food offerings, has curated a number of tours and self-guided itineraries that ensure that guests find the niche local gastronomy spots that they might otherwise overlook. Guided tours are bookable online or guests can download the self-drive itineraries.

Besides the reassurance offered by peer reviews, several travel agents, tourism boards, airlines and hotels have started using Virtual Reality and other immersive visualisation options (e.g. 360° views) to give travellers a clearer idea of what they can expect of the destination, experience or service that is being offered to them. In particular for those parts of England that are less known by the masses, this can be a powerful tool to persuade travellers of the charm of these destinations.
Thinking about risk more literally, greater concerns are also occupying travellers’ minds when planning their trip. The risks they are considering range from the personal (e.g. potential violence or discrimination against different races or sexuality) to the political (e.g. likelihood of terrorist attacks). We anticipate that the latter category of risks will only become more top of mind in years to come.

**Case study**

**Tripfez** is a holiday booking platform which puts the needs of Muslim travellers at the core of its offering. The online marketplace clearly displays the benefits that different hotels and operators offer to Muslim guests, such as prayer mats, lists of local halal restaurants and whether the hotel is Salam Standard registered. Tripfez has also developed an easy to use prayer time search, for those who are unsure of prayer times in different time zones.

> It’s getting easier and easier to see what places look like, to hear about other people’s experiences prior to your travel. I think that’s why places that used to be fairly non-ubiquitous are becoming more and more popular tourism destinations.

Nick Larson, Head of Platform, Timelooper

> Travellers take into account a list of criteria when choosing a destination like what the weather will be, whether they have enough time off at work to go, whether they are visiting a location that is LGBT friendly and whether is it safe to travel to this location in light of recent terror attacks.

Male, 34, USA
Inspiration & Pre-Planning: 5-10 Year Horizon

Future travellers will have the world at their fingertips with a wide range of reviews sites, blogs, social networks and other sources at their disposal. However, as these tools are optimising the personalisation of the content they display to each individual based on what they appear to enjoy most, it will become an increasingly sizeable challenge for tourism products to enter and remain on the traveller’s radar.

Questions to ask to future proof your tourism offering

- Is your tourism product visible enough in the changing inspiration landscape? How can consumers currently find your product? Which other channels do you believe you should be using?
- Do you have a clear view of which traveller groups you are trying to reach, and are they able to easily find out about your product if they are using algorithms to personalise their searches?
- Are you working with social influencers? If not, which social influencers would be a good match for your product? How could you collaborate?
- Do you believe travellers would see your tourism product as an experience they would like to share via word of mouth or online? How could you encourage them to do this more?

As the 2008 downturn becomes a more distant memory, value becomes increasingly about other things than just price. While this is of course subject to further economic shocks and price will no doubt remain a major factor to consider for travellers in any case, our view is that while the maximising mindset will persist, travellers’ definition of value will gradually become more about getting the most out of their trip, i.e. collecting as many experiences as possible without having to waste too much effort or budget on getting about at the cost of time and money to spend having a good time. Personalisation will be increasingly key too, with travellers seeking to customise their journey and pick and mix those experiences most relevant to them. Discounts/offers should be tailored accordingly as well.

Questions to ask to future proof your tourism offering

- Is your tourism product accessible at different price points?
- Do you have any view on how your target group(s) defines value?
- Is it expensive for travellers to physically reach your tourism product? How can this be improved / made more cost-efficient (e.g. multi-city transport tickets, multi-attraction tourist cards)?
- What differentiates your tourism product from others/what is your USP that makes your product worth visiting?
- Would your product seem more appealing to travellers if they are aware of other tourism destinations in the same area? Are there any collaborations with nearby tourist attractions that would make sense?
- Do you allow travellers to tailor the experience of your product to their personal preferences? If not, how can you do this going forward?

Risk-averseness will be a key characteristic of the future travellers, and it will become ever more essential to give people the confidence they need to come and enjoy your tourism product. Travellers will continue to be limited in terms of budget and holiday time available, meaning they will want to know in advance what to expect and how to avoid missing out on key attractions. Technology such as VR can be used to reassure and excite travellers at the same time.

Questions to ask to future proof your tourism offering

- Is it clear for travellers what your tourism product has to offer before they get there? What more can you do to clearly communicate this and excite people?
- How can you help guide travellers in getting the most out of your tourism product and avoid missing key experiences?
- Are travellers coming to your tourism product likely to worry about any cultural risks (e.g. language barrier, hostility towards certain race or sexuality) or political risks (e.g. terrorist threats)? How can you reassure them?
2. Booking Process

While the pre-planning journey has in many cases become longer than in the past, the booking process on the other hand is now more instant than ever before. From booking flights and accommodation to specific tourist attractions or restaurants, the use of online and mobile channels is now the norm, with some younger travellers even venturing on messaging platforms to book different components of their trips.

Making a booking has seemingly never been as easy as it is today, with many aggregator sites (e.g. Trivago, Kayak…) allowing travellers to reserve their flight, hotel and tickets to attractions all at the same time – often at a discounted price. We are also seeing the first examples of online wishlists becoming shoppable, and of travel companies dealing with bookings over messaging apps rather through traditional websites or customer service channels.

Courtesy to mobile devices and an improved infrastructure for connectivity, more travellers are now postponing the booking of specific activities until they are actually at their destination, as tech advancements are breaking down ever more barriers in this respect.

Wishlisting

Future travellers will expect to be able to more easily take the step from inspiration to purchase, by shopping directly from wishlists and a range of new interfaces such as smart TVs.

Conversational Commerce

Making enquires about or booking tourism products will be easier than ever for future travellers, as they won’t even have to leave their own messaging apps to do so. There will be less need for tourism products to develop their own expensive apps or websites.

Impulsive Existence

Fuelled by the fear of missing out, a desire to travel like a local – not a tourist – and a growing comfort with mobile purchases, future travellers will more often prefer to book tourism products once they are at their destination. Products that do not accommodate this behaviour might increasingly be overlooked.
Wishlisting

So many travels are now preceded by an extensive period of exploration, pinning and pining-for online. Consumers are collating wishlists on Pinterest, Instagram and similarly visual platforms, using imagery shared by peers and social influencers. With so much of our identities and relationships played out online, these moodboards are an important channel through which consumers can externally showcase their tastes and personalities. While the trend is particularly prominent in emerging markets, younger consumers around the world are very responsive to the idea of collecting and sharing images that reflect their lifestyle.

% of consumers who attach high value to “sharing or collecting images online of things I like/things that represent my lifestyle” | 2016

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

Travel companies have started thinking about how to capitalise on this trend, with some having already made their own social media advertisements and feeds shoppable, meaning that consumers could turn their travel dream into reality through a single click. Others follow a similar approach, but add the shopping feature to the posts of partnering social influencers rather than their own.

Case study

Starwood Hotels have enabled booking through its Instagram feed. The booking feature is available on posts created by influencers invited to the Paris hotels.

Case study

The National Tourism Coastal Academy have developed the Coastal Pass, a holiday planning tool that visitors can use to create their own itineraries with unique interactive video footage that brings to life the beauty of the east coast of England from the ports of Hull to Harwich, drawing attention to stretches of coastline little explored by international visitors. While viewing, users are able to select their favourite experiences (e.g. places to eat, stay, visit...), focusing on their areas of interest, such as nature, culture, history or sports.

While shoppable social feeds can offer the final push to consumers for booking a holiday, accommodation or travel activity; online wishlists are in first instance seen as aspirational tools that sit separate from the actual practicalities of booking. The step between feeling enticed by beautiful, exciting tourism-related imagery and making a booking can be rather daunting and will continue to be so in the short-term future. A more effective approach could be to add instant shopping features to targeted advertising on wishlisting services (e.g. Pinterest) or visual social platforms (e.g. Instagram), providing that extra encouragement to consumers in the context of bookings they were already considering.
Going forward, consumers will become more used to making bookings online/using their mobile and will see ever more interfaces as potential touch points for making purchases – which will reduce the barriers for commercial wishlisting significantly. Beyond social platforms, we imagine consumers will be able to book flights, accommodation and other aspects of their journey directly from a range of interfaces, as the Amadeus case study demonstrates.

**Case study**

Travel technology company **Amadeus** noticed that during one episode of *Sex of the City*, in which the lead characters went to Jamaica for the weekend, there was “an interesting spike in search activity for destination during the programme’s ad break”. Using this insight, they started thinking about how they could implement the technology to build on it. In collaboration with US carrier United Airlines, a prototype technology was developed that makes use of GPS location tracking embedded in the filming process. By integrating airline data into the coding, the viewer can be given information on the best flight options and travel deals using smart TV sets such as Apple TV.

“Swedes definitely wishlist, but I think it’s quite a big step to see an ad on Instagram from a travel agent and then just click ‘book now’. Booking a trip, at least when you go with other people, often needs a bit of coordination with regards to time off work etc, which means seeing an ad in your feed and then instantly clicking to book, might be quite far off. However, if it is a custom ad (which it probably is), that might be enough to push customers over the edge and book.

Female, 27, Sweden
Case study

Interrail is now using Facebook Messenger and WhatsApp to communicate with travellers who are planning an Interrailing adventure across Europe, or those who are currently on such a trip. To make communication easier, travellers and staff alike can add images or documents to their messages. Several people can join the conversation, making it easier for groups to organise their trip together instead of relying on a single organiser. While some examples of Conversational Commerce are based on chatbots, Interrail only uses experienced agents.
Impulsive Existence

While a lot of pre-planning goes into holidays today, there are certain decisions travellers do not want to commit to until they are actually at their destination. This is strongly driven by FOMO (Fear Of Missing Out): no one wants to have booked and paid for a whole range of tourist attractions, only to find out there are much more exciting options available to them once they arrive. Booking on the spot rather than showing up with a folder full of printed reservations also fits in better with the living like a local approach championed by so many of today’s travellers.

"I often make leisure plans at the last minute" | % who agree strongly or agree | Adjusted data | 2015

High penetration of mobile devices and more widespread availability of Wi-Fi have generally made it easier for travellers to postpone these types of bookings until the moment of their trip, but this does not mean the process is entirely stress-free.

"It’s quite easy to book things while already on holiday. It gives one the impression of being a little more like a local than if they’d booked everything ahead. The main barrier I can think of is the language, as in many countries local websites aren’t translated into English and staff also sometimes struggle to speak foreign languages. That’s why it might be easier for some people to just book things ahead of their holiday so they don’t get stressed while there."

Female, 27, France

The potential risks associated with not making bookings in advance are varied, ranging from travellers struggling to find local info due to the language barrier, because they had to queue for ages for an attraction while those with pre-made bookings were cruising on in, or because there were simply no tickets left and they did not at all get to experience the attraction they wanted to visit.

"I find it easy to book things while already on holiday, but it depends strongly on the destination. I didn’t get to enjoy my visit to Guangzhou in China properly last year mainly because I could not use Google, Foursquare there is empty, and information in English about things to do, eat or visit was scarce aside from very old blog posts on WeChat."

Male, 28, Germany

Technology is steadily removing more and more of these barriers, e.g. with real-time translation tools, ticket management services, self-service kiosks or messages to alert people when it is their turn to enter an attraction without confining them to a queue for several hours.
Case study

Keyflow is a guest management service for clubs and parties. For consumers, the benefits of using Keyflow are numerous as users can see what parties still have tickets available on the day and can purchase priority access, allowing them to skip queues which, like tourists destinations, can be notoriously long. The service comes with an app that supports 7 major languages, enabling the discovery of events with guaranteed entry when in a new and unfamiliar destination.

Case study

The Roman baths in Bath encourage pre-booking by offering travellers the chance to save money and gain access to smaller, lesser known but interesting exhibitions or galleries that they may not have otherwise heard of. Even if pre-booked when on the trip itself, this approach offers tourists the opportunity to become aware of more locally known attractions and allow a level of spontaneity in terms of planning.

The main benefit of it becoming easier to make bookings on an ad hoc basis is that travellers can repurpose their freed up pre-planning time looking into what they are most interested in doing, reaching out to their network or creating connections with locals, rather than having to worry about more micro-level concerns such as wayfinding or getting tickets to every single attraction in advance.

“I think that maybe planning is now more at a Meta level, (plan how to get to and from your major destinations) but not at the micro level (what you do when you are there,) as people who are confident in having access to local information when they’re at the place delay that level of planning and use online services. People want reassurance about tariffs and internet access and that type of thing, or otherwise you just take your guidebook as you always have and use that.”

Jo Reid, MD, Calvium

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Booking process: 5-10 year horizon

When wishlisting travel experiences today, the act of collecting and showcasing the travel ideas we find online is valued almost as highly as the eventual booking itself, if, that is, a booking is made at all. While it will remain imperative that tourism products can be pinned, treasured and shared on wishlists for that reason, it is the commercial aspect of these wishlists that will become more influential going forward. In the next decade, travellers will become more accustomed to making online purchases and to seamlessly shop from all kinds of interfaces, from social platforms to TV screens – slowly lifting the current barriers that exist in this respect.

Questions to ask to future proof your tourism offering

- How can consumers book your tourism product at the moment? Are you offering them any ways to quickly make the step from inspiration to purchase? How could this process be made more seamless?
- Does your tourism product have a presence on wishlisting/visual social media platforms (e.g. Pinterest, Instagram), either via its own profiles or through social influencer feeds? If so, can consumers directly make a booking via any of these platforms?

Currently, a lot of communication between tourism providers and travellers still takes place on traditional channels or, at best, via the provider’s own website or app. Not only is this a potentially expensive solution, it rarely offers a truly customer-friendly experience. The use of messaging apps is growing rapidly and across different age groups, leading us to predict a future of Conversational Commerce in which travellers are able to contact companies (both during the booking process and after) via their own messaging apps: these are comfortable environments for travellers to ask questions, make bookings and share with friends. Also when making last-minute bookings of tourism attractions (see Impulsive Existence), it is easier for travellers to use messaging apps instead of having to make expensive calls abroad or try to download apps/navigate websites.

Questions to ask to future proof your tourism offering

- How can travellers currently find out more/enquire about your product? Do they have to go to a bespoke website/app or do they have easier ways of contacting you with questions/make a booking?
- What are the most used messaging apps in the countries of your target audiences? Are you using these apps at all in the customer service/booking process at the moment?
- Are there any other ways in which the customer service/booking process could be made more accessible and casual for the traveller? Which ones?

Future travellers will be more used to making online bookings and, especially as Wi-Fi connectivity and affordable roaming become more accessible, fewer travellers will feel the need to make all their travel-related reservations ahead of embarking on their trip. In order to cater to or support these consumer needs, tourism products should try and remove as many barriers as possible that would stop travellers from making a booking during their stay, such as unclear / non-translated information, long queues or no guaranteed entry. If you believe pre-booking is the only or preferable way to manage your tourism product, this needs to be clearly communicated to potential travellers.

Questions to ask to future proof your tourism offering

- Is it easy for travellers to (find out how to) make bookings for your tourism product once they are at the destination? What is helping them do this? What are the barriers and how can these be removed?
- Do you believe it is better for travellers to make bookings for your tourism product in advance? Why? How can you incentivise them to do so?
- Do you believe pre-booking for your tourism product will become more or less important in the future? How can you shape the process to benefit the consumer?
- Can your tourism product tap into the growing sharing economy to make last-minute decision-making easier for consumers (e.g. allowing travellers to easily and safely exchange or re-sell tickets for tourism attractions)?
3. Connected Travel

Connectivity does not only define how we plan and book our travels, but also how we interact with our destination and tourism products once we are there.

Location-based technology is speaking to travellers on-the-go, using contextual information to send out relevant recommendations and promotions. Meanwhile, travellers themselves are pushing out the latest news and pictures from their trip to family and friends back home, as well as anonymous contacts on social media.

At the other end of the spectrum, there is a lot of buzz around digital detox and the concept of allowing travellers to completely switch off from digital distractions during their break – a proposition that might sound appealing with those that have busy lives, but in reality people are creatures of habit and have become very accustomed to being constantly connected.

Locational Living

In a future with better connectivity, location-based technology will help raise awareness of and increase engagement with tourism products by pushing content based on an individual traveller’s whereabouts.

Performative Perfection

Future travellers are social media conscious and will have a strong preference for tourism products that are 1) contributing to their social capital/worth sharing; and 2) easily shareable.

Mastering the Mind

Highly aware of the pressures of modern life and the harmful impact this has on their personal wellbeing, relaxation will be a key motivation for future travellers. However, a real digital detox will still be a step too far for most!
Locational Living

In a setting where mobile technology and public Wi-Fi are more prevalent, GPS sensitive technology and devices enable travellers to understand and interact more closely with any locale, forging a locational understanding of the world and even social connections. This is a significant source of comfort for travellers abroad, and the role of tourist information centres in their current form can progressively more often be questioned as people are now more than ever empowered to find everything out independently.

The Locational Living trend also comes with an expectation from travel companies. Airports, hotels, tourist boards and specific tourist attractions alike can use the increasingly accessible location-based information about their existing and potential customers in order to target them in a more informed way. Is it dinner time? They might want some suggestions about nearby restaurants? Are they walking past an exhibition or specific landmark? Make sure they are aware by sending them a text, perhaps accompanied by a discount voucher.

Case study

Historic England and attractions such as the Rye Castle Museum are using Geo-Tourist, an audio tour website and app, to bring heritage points to life. Based on GPS location data, the tours take visitors around a route and plays informative audio clips at particular landmarks. There is also the functionality for businesses near the tour to advertise offers and services to users, linking a core product to both its surrounding history and the amenities required by modern tourists.

Much like other personal data, location-related information is becoming a commodity. While over time we believe consumers are becoming less fussy about sharing this knowledge with companies – albeit at a different pace depending on the country they come from and that nation’s cultural attitude towards data sharing – the best way to make people comfortable with this for now is to actually offer them services in return which offer them a clear benefit, e.g. in the form of discounts on something they really want at that given moment, or a relevant and personalised recommendation.

I know me and my connections would really appreciate notifications about landmarks around us. We often start too late with our holiday research and end up reading about landmarks only after our visit, which is a real shame.

Female, 24, Netherlands
Case study

The Vienna City Card, a card that combines unlimited public transport and discounted entrance to many of Vienna’s biggest tourist attractions, has now introduced a location-based functionality to its accompanying app. The map feature can be used offline, allowing tourists without internet connection to locate attractions and find out essential information about them such as opening times and entrance price.

Wearable technology holds a lot of potential for this trend. Whilst it might be annoying to get a series of texts on a day out travelling, inconspicuous notifications popping up on our wrist may feel like less of an interruption of our holiday time.

“I love getting recommendations when I am actually thinking of the thing they want to promote (e.g. a restaurant coupon around dinner time), but not at a moment where I wish to enjoy being on holiday.”

Female, 24, Netherlands
Performative Perfection

Today's consumers openly and performatively strive to portray a perfect self at all times using their social media profiles – showing others that they are at the right place at the right time and earning social status accordingly.

“I like it when people acknowledge my posts/photos/comments on social networking sites”
% who agree strongly or agree | 2015

From day one, travel has been an important part of this trend, as posting our holiday adventures on social networks is the quickest and most envy-inducing way of displaying ourselves as culturally aware and enjoying life.

“Germans often share information about their holidays, mainly photos and written stories with little snippets of their trip, but they almost always post an end-of-the-trip heartfelt conclusion on Facebook.”
Male, 28, Germany

Offline, it follows that performative habits are also having an impact on our offline lives; if we become the sum of our real-world experiences, a pressure exists to seek ever more outlets, pursue more leisure activities, anything to portray a more perfect self.

“I wish I could be more like the person I describe myself as on social media”
% who agree or strongly agree | Adjusted data | 2016

Though not exclusively for this reason, social media-conscious consumers will travel with content for their online profiles in mind, picking envious destinations with fantastic photo and video opportunities. Brands are appealing to these consumers by helping them to curate the perfect holiday posts that will gain the maximum likes and views.
Case study

W Hotels in the US and GB has launched a set of geofilters on Snapchat for their guests. The filters turn the guest’s snaps into a postcard to share with followers. The filters all have the hotel’s logo and messages such as “wish you were here”.

There are even examples of events centred entirely on being performative in a particular destination, which is a great way of bringing locals, domestic and international travellers together based on a universal behaviour.

Case study

Many new services are tapping into the traveller’s desire to share high-quality imagery from their trips and even build tourism experiences around this activity. Aperture Tours is a service which matches travelling amateur photographers of all levels with professionals to experience the most photogenic cities in the world with a local guide that helps them take great pictures, while exposing them to key landmarks. Locals in various destinations are also organising more casual events, such as photo walks, which inhabitants of a city and tourists alike can join without even having to sign up in advance.
Mastering the Mind

As consumers have, in recent years, focused more on their mental wellbeing, some argue that a lot of benefit can be found in moments of digital detox, i.e. extended periods of non-connectivity. Some holiday providers have started offering packages based on this perceived need. Yet while a small niche of tourists might be attracted to this proposition, the majority of travellers now see connectivity as a standard part of life and are not prepared to sacrifice their check-in at Brighton Pier or snap of Stonehenge for complete repose.

Wanting to take a break from social media while on holidays isn’t a very widespread behaviour, although the media talk about the idea of digital detox a lot. I definitely feel like this is very niche behaviour for now. Younger people especially have integrated the fact that technology is part of their lives and wouldn’t want to give up their smartphone or laptop while on holidays.

Female, 27, France

Even among older travellers, more and more individuals will choose to stay connected if they have the choice. They take pleasure in sharing their holiday adventures with family and equally want to keep up with how people are faring back at home.

The only social media program I use is Facebook and I use that to upload pictures. I’ll do it when I’m at home or having a nice dinner and especially on vacation. I love uploading pictures for all my friends to see! I don’t feel the need to not be connected digitally. I want to know how my kids are during my vacation when I’m away and I like to stay connected to them and friends and know what they are up to.

Female, 64, USA

Globally, only a minority of 20% consider digital detoxing a motivation to go on holiday. Nonetheless, there is a desire to avoid the negative impacts of technology overload. Therefore, consumers will appreciate innovations and services that allow them to experience holiday moments without digital interruption, but still benefitting from digital support.

Case study

El Camino is a Latin American travel service which offers trips with a personal group photographer to take the worry away from documenting the trip. Every morning holiday makers receive 20 photos from the previous day.

Case study

EasyJet has worked with the Barcelona Street Project on a prototype smart shoe that syncs with the wearer’s phone to transmit directions via vibrations in the shoe. The wearer can have a more immersive experience walking in the city free of a map.

Yet while there is limited appetite for full-on digital detoxes, relaxing and escape are dominant motivations for travel, and there are in fact opportunities for tourism products that introduce elements of switching off and re-focusing on the now, such as yoga retreats or nature-based itineraries that focus on providing mental reprieve and relaxation.

% who choose quiet and relaxation as a motivation for going on holiday

Source: FF Online Research | Base: 1000-5000 online respondents per country aged 16-64 (Indonesia & S. Africa 16-54), 2016 February
Connected Travel: 5-10 year horizon

As mobile device ownership and robust Wi-Fi infrastructures will only grow with time, travellers will increasingly look to use location-specific apps and technology to plan their holidays – and they will expect brand interactions based on location too. This trend provides a lot of opportunity for raising awareness and maximising enjoyment of English tourism products based on location and other contextual information. It can also be linked back to some of the trends discussed in this report: for example, location-based technology can be used to alert travellers of nearby landmarks they might otherwise miss (see Death of Risk); to inform them about queuing times for specific attractions (see Impulsive Existence); or to bring locations to life with additional content and information when travellers are actually there (see The Leisure Upgrade).

Questions to ask to future proof your tourism offering

- Is your tourism product currently benefiting from location-based technology at all? If not, how do you believe it could benefit from it going forward?
- How can location-based technology help enhance engagement with your tourism product?

Future travellers will be expert managers of their online personas, choosing very carefully which tourism products they want to be associated with. Tourism products need to be aspirational, allowing these travellers to boost their social capital by taking part in them and sharing images or stories about them on social (this links back to the Pursuit of Real trend discussed further in this report – more authentic products will be more attractive for future travellers to talk about to their network). The infrastructure for sharing is important to ensure that travellers have the equipment to make great content and the Wi-Fi capabilities to share it. Tourism products can be linked to specific hashtags or geofilters in order to address the traveller’s need to share, while simultaneously boosting word of mouth.

Questions to ask to future proof your tourism offering

- Does your tourism product contribute to the traveller’s social capital? If not, what actions should be taken to make it more aspirational?
- Are you encouraging travellers to take pictures, record videos, check in... at or write reviews of your tourism product?

As time pressures will continue to define the lives of future travellers, quiet and relaxation is the dominant motivation for going on holiday and brands are helping travellers find calm in their journeys. Tourism products which offer a relaxing, natural environment can have serious edge if communicating this well - many of England’s tourism products can build a compelling story based on existing qualities. While a niche but slowly growing group of travellers will be looking for holidays that offer more organised opportunities for mindfulness, most will still want to feel connected and use technology during their trip.

Questions to ask to future proof your tourism offering

- Does your tourism product allow travellers to relax? What makes your tourism product better at providing quiet and relaxation than others?
- How does your tourism product allow travellers to stay connected without ruining the relaxation qualities of the product?
- Does your tourism product offer any activities for more focused mindfulness tourists? Is this an area you want to explore or not?
4. Evolving Travel Needs

At the destination, it becomes clear that consumers have traded up and become more sophisticated in their demands from tourism products. Although many of them still (sometimes secretly) pine for the obligatory landmark selfies, today’s travellers (they don’t see themselves as tourists) are increasingly shying away from the obvious sight-seeing hotspots and instead want to live like the locals when they are abroad.

Closely linked to that, we observe a clear desire for tourist activities that are fun but also come with a sense of self-improvement. Learning has become a key characteristic of outstanding tourism products, but in ways that have previously been left unexplored.

Technological advancements such as Virtual Reality, Augmented Reality and hearables are also pushing the limits of how existing tourism products can be further enhanced by truly bringing locations and their history to life.

Pursuit of Real

Genuine, authentic tourism products are preferred by future travellers as they seek to get rid of their “tourist” stamp and experience their destination like a local instead.

The Leisure Upgrade

Skill-seeking future travellers will prefer tourism products that combine fun and an opportunity for learning or self-improvement.

Customised Reality

New technologies (e.g. AR, VR, hearables) can be used to bring to life and personalise experiences for more demanding future travellers.
Pursuit of Real

Seeking authentic experiences and fully immersing oneself in a local culture and atmosphere, has become a driving force behind the desire for travel for many. 64% of global consumers would go as far as saying that experiencing authentic culture of a place is the most important thing to them when going on a holiday – a figure that rises to 73% in France and 74% in China.

Travellers want to go off the beaten track and understand what it is like to live, feel, eat and drink like a local – and are often consulting these same locals to understand how they can do this.

People don’t want to think of themselves as tourists nowadays, they want to think of themselves as travelers. They have an increasing desire to have tea where local Londoners go, or visit Indian restaurants where the Indian ex-pats eat.

Nick Larson, Head Of Platform, Timelooper

“When I go on holiday, the most important thing for me is to experience the authentic culture of a place”

% who agree strongly or agree | Adjusted data | 2015

While the notion of being a “tourist” appears to have become something travellers increasingly looked down on, most would still choose to see the key tourist attractions of the places they are visiting, even if that means they have to disguise it in the form of an ironic selfie. A popular approach among travellers appears to be to first tick off the tourist hotspots before spending the rest of their trip uncovering some more unusual activities and locations.

Being a tourist seems to have a negative connotation for most young travellers, as if you’d be lame being a tourist. But when it comes to taking selfies, it seems the opposite is true: people almost satirically overdo being a tourist to capture a picture of them and some highlight of the country.

All my friends who have gone to England have made their phone booth picture. Almost as if they want to make fun of it, yet doing it themselves nevertheless.

Female, 24, Netherlands

I believe people always mix and match both touristy and authentic local things depending on how much time they have at a destination. If I go to Paris I love finding a good local restaurant loved by the locals but still go and take a selfie at the Eiffel tower.

Male, 28, Germany

Food is a big part of the quest for authenticity. A large share of consumers see it as a must to eat authentically when they are in a different country, and increasingly look down on old habits such as visiting international chain restaurants.
Case study

Each year, the Japanese Ministry of Agriculture, Forestry and Fisheries hands out the Savor Japan award to leaders in regional delicacies to encourage visits to different regions of the country. Winners of the certificate must be able to present their food or resource in the context of the geography of the area and its unique historical and cultural background.

What is considered authentic about a destination can differ from traveller to traveller, often depending on what their country of origin’s relationship is with the visited location – or on the pop culture references that are most relevant to them. As a result of England’s success in period drama (e.g. Downton Abbey), nostalgia continues to hold appeal for many international markets.

Case study

Visitors to Ystad in Sweden with an interest in Nordic noir TV shows can sign up for an “In the footsteps of Wallander tour” (which takes travellers to key locations from the series, as well as the town’s main historical attractions) and various conceptual guide tours where you can try to solve some Wallander murder mysteries. Various Wallander-related package deals can be booked through the local tourist centre. Besides being home to the Wallander stories, Ystad also boasts a fascinating history, top-class museums and art galleries, 40 km of sandy beaches and Skåne’s countryside on its doorstep.

However, it is not always easy to identify which tourism offers are in fact the real deal. Consumers are particularly wary of attractions that market themselves explicitly using the word “authentic”, but which often are much-despised tourist traps.

We should encourage local producers to market a better side of England, so that we get away from the stereotype of the food not being particularly good and it being overpriced. It would be a good thing to try to overcome a tendency to stay in major tourist spots by making the whole experience better and encouraging people to move round.

Jo Reid, MD, Calvium

I went to Sydney for the first time and I was quite surprised about how much English nostalgia there is. There was an English teahouse with cream teas, it was amazing. It was absolutely packed every day and what I realised there was that for a certain group in Sydney, the nostalgia of England, the ‘Downton Abbey’ type approach is really, really interesting. How does that then encourage travellers to travel to Yorkshire, where it’s based? That’s what I think really is going to start differentiating and driving the ability for the English tourism region, but they need to understand what value they add in terms of differentiation and what I call the experience that customers are wanting, aligning it to that.

Robert Sinclair-Barnes, Strategic Marketing Director, Amadeus IT Group

What I’ve found is that hotels and restaurants that highlight their authenticity aren’t actually particularly authentic, but rather tourist traps. That’s why I try to source things via Instagram, as real life people have gone to places and assessed whether it’s worth promoting or not.

Female, 27, Sweden
The Leisure Upgrade

In particular in the current uncertain economic and political climate, travel remains an important and prized release from the daily stresses and strains of modern living: a means through which we pursue fun, seek enjoyable experiences and, more simply, indulge in passive downtime. Whilst we by no means expect this to change in the near future, for a growing number of travellers, the very concept of holiday time has evolved to encompass a more nuanced and complex set of requirements.

Even though travellers still want their holidays to be pleasure-rich, so too do they seek pursuits which allow them to express a wide range of interests – learning additional skills, undertaking self-improving activities or trying new experiences. Over 7 in 10 global consumers claim that entertainment should be about learning new things as much as simply having fun. We suggest that many individuals strive to reflect their wider attitudes and beliefs through their chosen holiday activities, especially as social media constantly increases the pressure to perform by exposing us to others’ meticulously curated, active selves.

“Entertainment should be about learning new things as much as simply having fun”

% who agree strongly or agree | Adjusted data | 2016

Source: FF Online Research | Base: 1000-5000 online respondents per country aged 16-64 (Indonesia & S. Africa 16-54), 2016 February

Germans see travelling as both a leisure and educational activity, so they are curious and actively seek for understanding their destination well.

Male, 28, Germany

However, the concept of learning during our travels looks very different now from what it used to look like. Rather than confining the absorption of knowledge to museums and educational tours, more opportunities arise for travellers to enjoy their destination’s cultural heritage in the form of craft brewery visits, food markets or community events.

I tend to focus more on learning things and visiting locations that are culturally or historically relevant when I travel. I like discovering France’s countryside and visiting castles or other landmarks. For me, a holiday must feature nature, cultural activities and good food & drinks.

Male, 64, France

Don’t put everything into a glass box and expect people to come, because they will just be bored. If you look at the average consumer today, they are more demanding, more sophisticated, more culturally aware, have travelled further. There is built heritage, natural heritage and cultural heritage. Cultural heritage is all about people and food and wine and that one has become more important than the others. Culture is no longer dead, the cultural is alive and that experience economy is driving everything.

Ian Yeoman, Tourism Futurist
Case study

The Canal to Coast food tour between from Gothenburg’s archipelago and the Göta Canal (the tour can be started in either of the destinations) gives travellers plenty of opportunity to visit local artisan food producers on the way. Choose between a first night stop either at Norrqvarn Hotel, situated by the canal, or Styrsö Skäret guest house on one of the easily accessible islands in Gothenburg’s beautiful archipelago. Each of the locations have restaurants that have been awarded a Taste of West Sweden certification, and their focus is on using local natural ingredients. The journey in between will be filled with visits to traditional farm shops full of enticing delicacies, and skilful food producers who work culinary magic on their raw ingredients. Naturally you’ll be able to buy these local products from West Sweden’s well stocked pantry to take home with you and use in your own kitchens.

In many cases, self-improvement on holiday is also an extension of the hobbies and interests we already pursue in our day-to-day lives. For example, if we are into running, we won’t give up on that routine when travelling, but instead look for destinations that boast exciting running routes or where we can take part in a marathon. Or, if we are into traditional crafts, we might choose to go to Ubud in Bali to expand our skills in that field by taking part in workshops run by local craftspeople.

“We have had a lot of what I call professional reality TV programs like MasterChef and The Great British Bake Off. What we see are people that are amateurs trying to be professional more of the time and participating in that, and also using their hobby more often as a tourism experience.”

Ian Yeoman, Tourism Futurist

“Thematic trips have become more popular in Sweden I think, including trips like yoga, meditation and training holidays. I don’t think I ever heard of anyone going on something like that until perhaps five years ago.”

Female, 27, Sweden

Case study

The Swedish company Surfakademinen organises year-round surf camps in a range of exciting locations around the world for beginning and more experienced surf fanatics alike.

Travel is also becoming a time not only for discovering other traditions and ways of life, but finding out more about oneself, a self-discovery. Gap years turned into volunteering trips and spiritual retreats are becoming increasingly mainstream. The expectation that travel is about more than just relaxing, can sometimes be experienced as a form of pressure by the consumer, so tourism products targeting these travellers should certainly not lose sight of including pleasurable elements into their offers.
Case study

WWOOF, which can stand for World Wide Opportunities on Organic Farms, or Willing Workers on Organic Farms, is a loose network of national organizations that facilitate placement of volunteers on organic farms.

We’ve also seen a rise in conversation around the term “digital nomad”: a term coined to describe people who work remotely while travelling the world. Hospitality has caught up with their needs, creating working communities in beautiful destinations around the world. The “workation” (working-vacation) takes this a step further by organising fixed length trips, from 2 weeks to a year, for digital nomads to work while travelling with a group of like-minded people. Trips often embody values of self improvement and balance, providing space to develop ideas while also enjoying new experiences.

Case study

Accor Hotels has announced a new brand Jo&Joe that, in the style of a hostel, appeals to the traveller looking for shared spaces to work, chill out, do yoga and meet other travellers. The brand is opening in Paris and Bordeaux in 2018.

“Amongst youngsters, it seems to be a trend not just to have a gap year, but to have a gap year and volunteer somewhere. This obviously started with good intention, but it nowadays almost seems wrong and immoral to have a gap year and just be a tourist.

Female, 24, Netherlands
**Customised Reality**

New technology gives control to the consumer and allows individuals to alter how they see, hear and even feel real-life experiences such as travel. Augmented Reality was already given a huge boost by the success of Pokémon Go, but its uptake is forecasted to grow even further at a steady pace. Virtual Reality is also expected to become more popular as more consumers will use it domestically and the cost of VR sets is set to decline.

The next generation of augmentation technologies turn reality into a spectrum, where virtual adjustments can be dialled up or down. Consumers will be able to switch between full blown immersions in another world (like when using VR) to using inconspicuous tech which simply enhances reality. The future promise is mixed reality, where consumers can interact with digital objects in real spaces.

Several start-ups are doing extremely exciting work in this area, using VR and AR alike to enhance and bring to life the experience of traditional tourism hotspots. These technologies are a thrilling way of updating existing tourism products that rely on history and heritage, and which increasingly struggle to enthuse younger audiences as new alternatives such as the Harry Potter Studio Tours or Shrek’s Adventure Land emerge. A couple of the experts we spoke to – Jo Reid at Calvium and Nick Larson at TimeLooper – are very active in this field, developing and supporting tourism products in immersive ways.

**“Which of the following kinds of apps do you use at least once a month?”**

**Augmented reality apps (e.g. Pokémon Go) | November 2016 forecast**

![Graph showing the percentage of individuals using augmented reality apps at least once a month in China, Spain, USA, France, Sweden, and GB from 2010 to 2025. The graph shows a steady increase in usage over time.](image)

Source: FFonline Research | Base: all individuals aged 16-64, 2016

**Case study**

**Calvium** is a company that develops GPS and location-based apps. One of their most recent success stories is The Lost Palace, a project in collaboration with Historic Royal Palaces. Using bespoke handheld devices, binaural 3D sound and haptic technology, visitors are led on an immersive adventure that allows them to hear, touch and feel the past - experiencing history in the exact locations where it happened. The most interesting thing about this particular experience is that the heritage site previously had never seen any visitors – because it no longer exists after burning down entirely over 300 years ago!
Case study

The England’s Heritage Cities consortium developed an augmented reality app as part of the Discover England Fund. The aim was to represent the 12 cities and their heritage products to attract a younger demographic. As part of the project, focus group research with the target market was conducted, which indicated that the more sophisticated and immersive the technology, the less appeal it had – consumers do not want the technology to detract from the experience, but instead enhance it. The audience was far more interested in the authentic stories that could be told within these places and how AR and VR could be used as a means to bring them to life. The resulting app allows visitors to explore each attraction and unlock a collection of engaging stories using AR. The stories are communicated using a number of features including 360 photos, 3D models and simple text and image overlays. A follow on study with the target market indicated that they were 72% more likely to visit Heritage Cities than they were before.

Case study

TimeLooper is a VR platform that allows visitors to interact with history at cultural sites around the world. By bringing VR to the actual historical locations, TimeLooper aims to create a level of immersion and empathy that could not be achieved through VR experiences for domestic use. The company has also started using AR to overlay historical documentation onto real-life scenes. TimeLooper are currently running a number of projects in London, geolocking content to different parts of the city with the intention of bringing travellers from the city centre (i.e. the acquisition points) to other London zones and eventually even different cities.

“Within our digital placemaking strategy we often do storytelling, so that can be straight GPS triggered, tell you about where you’re standing in terms of audio and images. It can be enhancing where you are with augmented reality. So I think AR really helps to bring alive and recreate things that are no longer there, or open up things that you can’t access – the interiors of things, or seeing behind things."

Jo Reid, MD, Calvium

“Today’s parents bring their children to London and it’s not do we go to the British Museum or do we go to Tower of London – it’s do we go to the British Museum, Tower of London, or do we go to Shrek’s Adventure Land or the Harry Potter museum? Using this technology not only does a better job of conveying historical and cultural information passively conveyed today, but it also provides appeal to a completely different demographic. So now kids are excited about going to Tower of London and watching medieval knights battle, or watching the ships traverse the Thames from unload goods from ports hundreds of miles away in the 13th century. Using VR to that end makes the site more compelling and is a way for parents to get their children excited about history and culture and helps the sites compete against Shrek’s Adventure Land.”

Nick Larson, Head Of Platform, Timelooper
While not necessarily seen by all types of consumers as a valuable way of enhancing travel experiences, the practical qualities of hearables with real-time translation features are hard to deny and could be transformative tools for many tourism offerings.

**Case study**

Mymanu CLIK are smart earbuds with voice translation. The earbuds aim to revolutionise communication by incorporating aural notifications, live translation, noise cancellation and touch control in each earbud. The earbuds come with a charging case and a year subscription to the CLIK translation app.
Evolving Travel Needs: 5-10 year horizon

For future travellers, who refuse to see themselves as tourists, genuine authenticity will be one of the key criteria against which they will evaluate tourism products. With consumers readily challenging any self-boasting brand claim, companies will have to walk the walk and talk the talk, proving in unequivocal ways that they are real and true to their brand values. Tourism products will have to focus on aspects that are genuinely authentic (as opposed to only using the term as a deceptive marketing vehicle), allowing travellers to take part in unique travel experiences that help them go beyond simply experiencing a location from the perspective of a tourist. Different nationalities will be interested in different sides of English culture, and it is important to understand these nuances in order to maximise engagement. It is worth highlighting authentic stories and experiences related to existing tourist attractions, as most travellers will still also want to visit these during their travels.

Questions to ask to future proof your tourism offering

- Which elements of your tourism product are most authentic (e.g. food, nature, opportunity to meet the locals...)?
- How can you prove the authenticity of your tourism product to travellers (e.g. certificates/labels indicating restaurants using local ingredients)?
- How is authentic Englishness perceived by travellers from your key markets? Which features of your tourism products can be played out in this context?

Against a backdrop of job uncertainty/need for constant re-skilling due to the rise of automation, as well as a strongly performative culture (see Performative Perfection), future travellers will be looking for tourism products that combine fun with a sense of self-improvement, even if that sometimes means catering to smaller groups of people (centred around a specific interest or activity) instead of an all-inclusive audience. Cultural heritage will lie at the heart of these experiences, as travellers prefer to learn through participation in the local culture. The current foodie trend in particular is a great opportunity for England to leave behind the stigma of having a bad cuisine, by encouraging different regions and cities to promote gourmet versions of their signature dishes, organise food events, etc.

Questions to ask to future proof your tourism offering

- What does your tourism product offer in terms of opportunities for learning or self-improvement? Are there any more untapped opportunities in this respect?
- How do you present learning experiences as part of your tourism products (e.g. museum vs. local markets)? Does it invite travellers to participate?
- Is there cultural heritage (e.g. local cuisine, specific traditions, popular music acts...) your tourism product can tap into better than it is doing now?

New technologies such Virtual and Augmented reality can be used to enhance existing tourism products and create a heightened level of empathy with a history, culture or environment. Hearables are another tech area with a lot of potential for the tourism industry, either as a non-intrusive narrating tool (which is likely to appeal more to older travellers) or a practical translation tool for travellers of all age groups.

Questions to ask to future proof your tourism offering

- Are there elements of your tourism products which are harder for travellers to engage with and which require quite a lot of pre-research/imagination?
- Which new technologies do you believe could enhance your tourism product most in terms of really bringing these aspects to life? VR? AR? Hearables?
- Do you believe your tourism product could benefit from any of these technologies in a practical way (e.g. for real-time translation) rather than from an engagement point of view?
Summary

These are the trends that will transform the travel journey of international tourists travelling to England in the next 5-10 years and define the expectations of future travellers accordingly. They provide a future-proofing checklist for tourism products being developed against this time frame.

Filter Bubble

Despite the endless resource offered by the internet, future travellers will live in a filter bubble created by personalisation algorithms and homogenous social networks. Tourism products will have to work hard to stay on the traveller’s radar.

Maximising Behaviour

Value, for future travellers, will be about more than price. They will opt for trips that allow them to collect as many unique experiences as possible on their journey, without having to invest considerable time and money in getting about.

The Death of Risk

With limited budget and holiday time available, future travellers want to find out as much as possible about their destination before getting there. They expect travel providers to empower them by providing enough upfront information about tourism products.
Wishlisting

Future travellers will expect to be able to more easily take the step from inspiration to purchase, by shopping directly from wishlists and a range of new interfaces such as smart TVs.

Conversational Commerce

Making enquires about or booking tourism products will be easier than ever for future travellers, as they won’t even have to leave their own messaging apps to do so. There will be less need for tourism products to develop their own expensive apps or websites.

Impulsive Existence

Fuelled by the fear of missing out, a desire to travel like a local – not a tourist – and a growing comfort with mobile purchases, future travellers will more often prefer to book tourism products once they are at their destination. Products that do not accommodate this behaviour might increasingly be overlooked.
**Locational Living**

In a future with better connectivity, location-based technology will help raise awareness of and increase engagement with tourism products by pushing content based on an individual traveller’s whereabouts.

**Performative Perfection**

Future travellers are social media conscious and will have a strong preference for tourism products that are 1) contributing to their social capital/worth sharing; and 2) easily shareable.

**Mastering the Mind**

Highly aware of the pressures of modern life and the harmful impact this has on their personal wellbeing, relaxation will be a key motivation for future travellers. However, a real digital detox will still be a step too far for most!
Pursuit of Real

Genuine, authentic tourism products are preferred by future travellers as they seek to get rid of their “tourist” stamp and experience their destination like a local instead.

The Leisure Upgrade

Skill-seeking future travellers will prefer tourism products that combine fun and an opportunity for learning or self-improvement.

Customised Reality

New technologies (e.g. AR, VR, hearables) can be used to bring to life and personalise experiences for more demanding future travellers.