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# Tomorrow's tourist: scenarios and trends

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# Dr. Ian Yeoman

- A tourism “futurist” and author of *Tomorrow’s Tourist: Scenarios & Trends*
- An expert on how demographic, economic and technological trends will shape tourists’ preferences and successful destinations’ characteristics.
- This presentation represents a selection of information and trends discussed by Dr. Yeoman in a Travel and Tourism Research Association webinar on November 16, 2010.

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# Yeoman's three key drivers of tourism change

- What three things have the greatest effect on tourists' attitudes and behaviours?
  - The relationship between wealth and demography – e.g., what are the age and economic growth trends in the world?
  - The availability or scarcity of resources – e.g., how might the cost of oil effect global travel?
  - Technology – e.g., how is entertainment being delivered to consumers; how are travellers planning and booking their trips?

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# Global economic trends

- By 2050, the three countries with the greatest GDP per capita: China, USA, India
- Meanwhile, forecasts for Japan, Germany and Italy (major current global sources of tourists) show low GDP growth over the next 40 years
- World Tourism Organization: by 2020, China will have 100 million international travellers, making it the largest outbound tourism market in the world

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# Global demographic trends

- Increasing population: from 6.8 b to 9.2 b by 2050
- Older population: median age increasing – more so in developed countries, but also in developing countries
- Over next several decades, large decrease in proportion of under-25 population expected
  - How will this affect the activities we offer?
  - How will this affect our sources of hospitality labour?
- Life spans increasing; quality of life improvements into later years expected to lead to more aged travellers

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# Technology trends

- IT miniaturization:
  - Mobile phone apps embedded in contact lenses
- New interfaces:
  - Gesture-based interfaces (think “Minority Report”)
  - Thought control headsets (already in use for persons with disabilities)

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## Technology trends...

- Growth of virtual reality and artificial intelligence:
  - Robots as room attendants / in visitor centres
  - Virtual travel as a way of trip planning (e.g., haru2010.com – a virtual trip to Korea)
  - Cross-language search and translation – the end of language barriers?
- Pervasive networks and tracking:
  - Smartphone recognizes consumer products including destinations, hotels, etc. and instantly downloads pricing and reviews – dramatic decrease in trip planning timeframes?
  - Facial recognition technology – access traveller's profile and information instantaneously

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# Consumer trends

- They want to see, do and experience all, but in a sample size
  - What was once a 5-day safari may now be a 2-3 hour excursion
- Consumers increasingly well-educated about the destination, often self-educated
- Consumers nostalgic for “good old days”; myth of society’s decline is pervasive
- “Insperience”: consumer experiences shaped by computers, video games; leisure pursuits moving increasingly indoors
- Mercurial consumption: consumers try to predict prices, will postpone purchases for better deal (e.g., bing’s farecast tool)
- Oscillation of travel trends based on economy
  - Boom: growth of expensive, risk-seeking, frivolous activities
  - Bust: discretionary thrift; thrift as primary goal of travel; preference for elegant yet thrifty boutique hotels (i.e., with smaller rooms).

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# The new luxury

- Redefinition of luxury: Less emphasis on conspicuous consumption, more on authentic experiences
  - Themes: authenticity, simplicity, natural, rooted experiences
  - Volunteerism at travel destination increasingly seen as a way to “give back” and enjoy authentic experiences
  - Focus on relationship-building with locals – e.g., meet Swiss net grannies online who will knit you socks. Communication is widespread, experiences are shared

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## The new luxury traveller...

- Increased emphasis on corporate integrity, ethics, openness
  - Consumer boycotts can materialize quickly to devastating effect
- Travellers looking to share their experiences
  - Previously, a dissatisfied customer might have told 6 others; now it may be thousands of others
- Distinction between business and leisure traveller may be disappearing – fusion of work, education and social lives
- Increased focus on healthy travel experiences, extending lifespan, improving quality of life
  - Hotel mirrors that provide biometric information

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