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Welcome

From the very beginning, in our inaugural Trends Paper published in 2013, we set out to inform and inspire Scottish tourism businesses. Year on year, we’ve continued with this aim. We invite our readers to reflect on who their customers are, what motivates their actions and how their interests are changing. From here, we can work towards making Scotland the most dynamic visitor economy in the world.

Our 2019 Trends Paper is dedicated to examining the global consumer phenomenon of ‘Wellness’. The United Nations World Tourism Organisation defined wellness tourism as “a type of tourism activity which aims to improve and balance all of the main domains of human life including physical, mental, emotional, occupational, intellectual and spiritual”.

The Global Wellness Institute (GWI) goes further to make clear that this is a distinct and dynamic travel category that differs from medical tourism and, in November 2018 GWI reported:

Wellness tourism grew from a $563 billion market in 2015 to $639 billion in 2017, or 6.5% annually, more than twice as fast as [global international] tourism overall (3.2%).

The leading growth markets for wellness tourism include China, India, USA and Germany. For Scotland, these represent two of our key emerging inbound markets and also our top two international inbound markets by volume and value. Many countries are increasingly marketing wellness as part of their product portfolio. GWI saw 65 nations market wellness in 2013, growing to over 100 in 2018. According to GWI, having an “authentic, place-based wellness tourism product” is increasingly prominent around the world.

Scotland’s tourism industry has embraced wellness within its product mix from the early days of travel. Wellness during the Victorian era in Scotland was provided through the hydro-spa hotels, such as Dunblane, Peebles and Crieff to name a few. Today, Scotland presents the wellness tourist with a vibrant range of offerings including yoga retreats, challenging long distance walks and, most recently, an escape route to raw, natural beauty via the North Coast 500 road. With Scotland’s abundant natural assets of landscape, culture, food and drink, and heritage, combined with a varied and vibrant tourism industry, we are well placed to embrace and capitalise on the global movement that is wellness tourism.
Catalysts of Change

The Journey and the Destination...

Wellness has been a consistent theme throughout our annual Trends Papers, recognizing the importance that the travelling consumer places on this growing movement.

Over the years we have presented wellness trends such as Digital Detox (2013); Soul Recharge (2014); Provenoucement (2015); Seeking Famili-ference and Urbanesence (2016); Silence is Tartan and The Hunt for Sustainability (2017); and Coorle in and Elemental Tourism (2018).

What each of the above trends represents is the increasing desire of the traveller to escape, recharge and experience new things. The wellness movement really provides something for everyone. Wellness, combined with the developing consumer drivers of sustainable awareness, personalisation and authentic unique experiences, gives a broad spectrum for presenting the diverse product range Scotland currently offers and the potential for new opportunities for entrepreneurial business.

Have you noticed the world changing? More people are talking about how busy their lives are. Holidays are increasingly seen as a necessity rather than a luxury. These trends have begun to permeate most strata of society. From the growth of veganism to green, organic and clean living, people are looking at how they live their lives and how they can achieve betterment. Our method of trend development is through the consistent observation and monitoring of diverse sources of information (a process called environmental scanning) that identified the ‘wellness’ trend as a significant movement in travel and tourism throughout the world now.

While the force behind this driver may be traced to the rise of the millennial and the impact this cohort has on today’s economy, wellness transcends age, social and geographic boundaries. It appears everyone is seeking their interpretation of wellness in some way.

Our starting point for this year’s Trends Paper is the interface between travel and wellness – the search for self, space and spirit. This may be escapism, seeking new experiences or embracing a specific product that is uniquely available from one provider in one destination. However, visitor drivers also show that many travellers who strive for escapism and look to unwind also document, record and share their experiences through social media, creating content and seeking validation from peers which, in its own way, inspires others to begin their journey to wellness or betterment.
Defining the Mega-Drivers

Mega-Drivers – Our Themes for the Trends

A Mega-Driver is a ‘slow-burn’ movement or change that may be developing, establishing or embedding within society. The Mega-Drivers presented below are, in this instance, thematic vessels with which individual trends are associated to provide a convenient grouping. In practice, the Mega-Drivers are a longer impact societal movement from which trends, a shorter impact and perhaps niche activity, may develop. By following the direction the Mega-Drivers are taking, we can, over time identify the development of the trends and the impact they will make.

Our Mega-Drivers for 2019 are shown below. They represent three elements of how wellness is influencing the travelling consumer:

- **The Art of Now** looks to the development of the individual. This may be through self development or an appreciation of the culture and heritage of the destination the individual has found themselves in. This embraces enrichment and personal growth.
  
  Associated Trends - *Rise of the Artisan, & Baby Comes Too, Trav-agogy, Frictionless Travel, Creative Retreats*

- **Sensory Tourism** immerses the visitor in the environment they find themselves in. Both urban and rural destinations can contribute to the visitor’s desire to experience tangible sensations.
  
  Associated Trends - *Restorative Recreation, Unexpected Adventures, Weather Wanderers, Spiritual Inspiration, Green Getaways*

- **New Society Norms** addresses our opening statement that there is a movement within society. More people are seeking something meaningful in their lives which travel can, in part, contribute to.
  
  Associated Trends - *Once in a Mil-lifetime, Silver Dream Machinists, Spends with Benefits, Authenticity, Social Business Mixers, Sensing the Change*

On the next page, we provide a detailed Trends Canvas which explores the insight offered by each Mega-Drivers composition.

The format that the Trends Canvas follows, analyses the distinct elements of the Mega-Driver, considering the ‘how’, ‘where’ and ‘for what’ the trend might be applied.

- **Basic Need** – What is the in-depth view of the needs and desires the consumers for this trend?

- **Drivers of Change** – Why is this change happening? This could be behavioural, societal or external (such as macro-economics or environmental change) influencers of change.

- **Emerging Consumer Expectation** – What new consumer needs, wants and expectations are created by the changes identified above? Where and how does this trend satisfy them?

- **Inspiration** – How are other destinations, businesses and organisations applying this trend?

The Trends Canvas is a demand-driven process that can articulate what consumers want and how businesses might respond. It helps to gather insights about trends and transform them into innovative business opportunities. It’s therefore the process of turning an observed trend into an innovation opportunity.
Mega-Driver Trends Canvas

**THE ART OF NOW**

### BASIC NEED
Which deep consumer needs and desires does this trend address?
- Uniqueness
- Provenance
- Convenience
- Value for money

### DRIVERS OF CHANGE
Why is this trend emerging now? What’s changing?
- Flexible family units
- Supporting local economies
- Searching for simplicity
- Connectivity

### EMERGING CONSUMER EXPECTATION
What new consumer needs, wants, and expectations are emerging as a result of the Drivers of Change? Where and how does this trend satisfy them?
- Family-friendly authentic experiences.
- Joined up travel options and itineraries with convenience.
- Home grown produce and product.
- Access to educational experiences and creative pursuits.

### INSPIRATION
How are other businesses applying this trend?
- Amazon’s new convenience store concept, Amazon Go, uses sensors and other technology to automatically detect when a customer picks up or returns products to shelves, while keeping track of “baker’s dozen” virtual shopping cart.
- Aida Aivaz, a Member of the Danish Parliament, wrote a piece for the World Economic Forum recently called Welcome 2020: I own nothing, have no privacy, and life has never been better. She speculates that for many shopping can be “choosing things to use. Sometimes it can be fun, and sometimes I just want the algorithm to do it all for me. The algorithm will increasingly know a user’s taste better than they will.”
- Travellers are increasingly choosing transport providers with the best apps for managing and being informed about bookings, cancellations and making changes to plans. Providers with the most reliable tools to minimise inconvenience and delay, and maximise flexibility, will gain market share over less reliable mobile solutions.

**SENSORY TOURISM**

### BASIC NEED
Which deep consumer needs and desires does this trend address?
- Connect to nature
- Sustainable quality
- Personal growth
- Unique and authentic

### DRIVERS OF CHANGE
Why is this trend emerging now? What’s changing?
- Sustainability and environmental considerations
- Need for simple sophistication
- Relationships between physical and mental wellbeing

### EMERGING CONSUMER EXPECTATION
What new consumer needs, wants, and expectations are emerging as a result of the Drivers of Change? Where and how does this trend satisfy them?
- Environmentally responsible tourism organisations.
- Ease of access to natural beauty of destination.
- Wellness-focused facilities.
- Authentic (sometimes imperfect) visitor experiences.

### INSPIRATION
How are other businesses applying this trend?
- The Scottish Charity, Trees for Life, offers “Conservation Week” holidays to provide an opportunity for volunteers from all around the world, of all ages and backgrounds, to help protect Scotland’s natural environment.
- National Trust for Scotland promotes Working Holidays and Conservation Adventures.
- Scotland’s tranquil river-side retreat in the Scottish Highlands offers retreats on a self-catering basis with opportunities to experience “not wild river baths” inspired by the Japanese tradition of the “Onsen”.
- Doctors in Shetland are prescribing birdwatching, rambling and beach walks in the Atlantic winds to help treat loneliness.
- The open-air hotel, Wall Birks in Switzerland, has no walls or roof and provides unobstructed views of the Alps. The room provides guests with just a cozy queen-sized bed, two lamps and spectacular views.

**NEW SOCIETY NORMS**

### BASIC NEED
Which deep consumer needs and desires does this trend address?
- Equality
- Influence and popularity
- Value for money

### DRIVERS OF CHANGE
Why is this trend emerging now? What’s changing?
- Changing perception of disability
- Prioritising travel financially
- Valuing experiences over possessions

### EMERGING CONSUMER EXPECTATION
What new consumer needs, wants, and expectations are emerging as a result of the Drivers of Change? Where and how does this trend satisfy them?
- Accessible experiences and personalisation for individual needs.
- Immersive experiences and real-life stories.
- Instant reward for custom.
- Splurge opportunities.
- Social spaces and networking opportunities on business trips.

### INSPIRATION
How are other businesses applying this trend?
- Luxury makeup brand, Sephora, has an interactive app to virtually try products and access exclusive in-app purchases. There is also the ‘Beauty Inside’ loyalty programme, providing points when making purchases which may be redeemed to get exclusive products and makeovers.
- Starbucks has the classic: point/reward system, but also integrates an app with personalised content like music streaming and ‘just for you’ recommended drinks to try.
- Invisible Cities® works with people who have been affected by homelessness and trains them to become walking tour guides. Invisible Edinburgh and Invisible Glasgow both offer walking tours that showcase their city’s historical landmarks and explore the social projects that make these cities what they are.
- Dan Appetite is a community marketplace that connects travellers with local home chefs for a unique home-dining experience, anywhere around the world.
- National Museums Scotland offer early doors and after hours access to promote autism-friendly tourism experiences.
Rise of the Artisan
Artisan (noun)
a person skilled in an applied art; a craftsperson
a person or company that makes a high-quality or distinctive product in small quantities, usually by hand or using traditional methods

Global brands, particularly in food and drink, have made worldwide travel with the comforts of home possible. Increasingly visitors are seeking authenticity through consumerism, and are engaging with products they would or could not access at home. Changes in attitude towards employment, resulting in the gig economy and ‘side hustles’, have contributed to the rise of individuals making a profitable income from their hobbies and artisanal products. By supporting local businesses, and directly contributing to the economy of the region, visitors can experience a sense of place and live like a local.

& Baby Comes Too…
Family holidays are changing with the evolution of the family unit. Multigenerational travel is becoming the norm as individuals increasingly value spending time with loved ones to create shared memories and experience somewhere new. Today’s travellers don’t expect travel with their babies to be problematic. Destinations that provide experiences that were previously seen as the preserve of adults but now include infants (baby yoga retreats) or businesses that can accommodate babies (nanny services, gourmet baby menus in restaurants) are sought and referred to through the parents’ social networks.

Frictionless Travel
Travellers are looking for frictionless travel that removes obstacles and makes journeys as convenient as possible. Frictionless Travel is a simple concept perhaps, but travel is never as easy as it might seem. Travel disruption is a common occurrence and with the rise in global travel there is a shift in travellers’ expectations.

Travellers expect to be kept informed and be provided with assistance if things go wrong or changes occur. Customer service levels will be tested in these scenarios, with negative customer-generated reviews awaiting those who don’t respond. Examples of innovative traveller information provision include Virgin Rail tweets which can be humorous and defuse tension, but respond to specific needs – for example, train staff coming to the rescue following a tweet about a missing toilet roll!

Trav-agogy
Travel is about more than reaching your destination, it’s about the journey you take when you’re there. With the focus on meaningful experiences, education is a key driver for travel. Learning about our history, heritage and culture continues to be a strong motivator to visit Scotland, particularly for international markets.

Younger generations, who place importance on experience over ownership, are taking this a step further and pursuing opportunities to learn a new skill or nurture a talent through immersive learning experiences during their holiday.

Creative Retreats
Travel today is increasingly motivated by gathering experiences. The move by consumers from material assets to generating memories is one of the biggest shifts in leisure spending. Hobbies, skills development and unique opportunities are all growth areas and writing workshops, artist retreats, outdoor survival schools and cookery courses all add to the attractiveness of a destination. By sharing your interests with your visitors you can build relationships and garner those all important referrals to their friends and relatives so they might visit too.
TRENDS 2019

Trends – Sensory Tourism

**Unexpected Adventures**

In today’s Instagrammable world, postcard perfect holiday snaps are the aspiration and expectation. But achieving this image of perfection can be a challenge. The discoveries we make when things don’t go exactly to plan are often what makes an experience unique. With an increase in visitors looking for the distinctive and the authentic, this will often translate to enjoying imperfect moments. The Japanese world view of ‘Wabi Sabi’ is centred on embracing the beauty in the unexpected and is closely linked to self-actualisation and wellness trends.

We are already seeing this trend in retail, with clothing brands reacting to pressure against airbrushing models’ imperfections and looking to celebrate individuals’ uniqueness. In 2019, we anticipate this will translate into travel and tourism, with consumers embracing genuine and down-to-earth sharing of experience.

**Restorative Recreation**

The emotional benefits of ‘ecotherapy’ are well documented, but recent studies have highlighted there can also be long-term, physical health improvements associated with time spent in green spaces. The Japanese concept of ‘Shinrin Yoku’ – or forest bathing – has been linked to reduced rates of cardiovascular illness and Type 2 diabetes.

With 1,593km² of urban greenspace in Scotland, and 27.5% of Scotland’s landmass classed as Accessible Rural Areas, the scope for businesses to include outdoor activities in their product offerings is massive. Edinburgh alone is 49% green space, the highest of any city in the UK, so urban areas can benefit from this trend too.

**Spiritual Inspiration**

While being mindful that there are adherents and secularists, seeking a spiritual meaning to travel is growing. Pilgrimage continues to be a driver of travel in many destinations both in Scotland and around the world. Indeed some of the pilgrimage trails have evolved to become long distance routes for those seeking to overcome an endurance challenge rather than pursuing enlightenment - Camino to Santiago de Compostela being just one example. Spiritualism takes many forms and seeking enlightenment from nature or marvelling at religious architecture may be enjoyed by all.

**Green Getaways**

Within the wellness movement is an appreciation of the impact that travel can have on the environment. Travellers are aware of their actions and are increasingly looking to offset this while maintaining the experiences and aspirations they set out to achieve. Organisations demonstrating that they are sympathetic (without ‘greenwashing’\(^{13}\)) to these ethics through their own practices, by supporting their visitors’ objectives, will benefit.

**Weather Wanderers**

In 2008, New York Times journalist Raymond Bonnar wrote: “…if you don’t like Scottish weather, wait thirty minutes, and it is likely to change”.\(^{11}\) A consideration that our destinations should bear in mind is that experiencing changeable weather may actually be a motivation for travel for some.

With Scotland’s temperate climate and dynamic weather, international visitors who perhaps don’t experience the changing seasons or are looking to a more comfortable summer temperature may be encouraged to see Scotland as the ‘weather destination’ of the world!
Trends – New Society Norms

Once in a Mil-lifetime

The spending habits of the millennial generation differ to those generations before them. Growing up and joining the workforce around the financial crash of 2008 has resulted in this generation placing less importance on accumulating wealth and more on saving for particular experiences. This fosters a positive attitude towards travel for generation Y. Millennials will often adhere to tighter budgets on holiday but will selectively splurge on experiences that they consider to be unique or unexpected, and then tell all their friends about it via social media.

Businesses should seek to understand where their product fits with the millennial budget to maximise ‘splurge opportunity’. This type of discretionary spending can also be influenced by providing personalisation opportunities.

Silver Dream Machinists

Age is no longer seen as a barrier to travel with many members of the baby boomer generation now using their retirement to fulfil lifelong ambitions, such as motorcycling. This method of travel is increasingly popular among the over-50s with this age-group being responsible for nearly 30% of all spending on bikes. In 2014, around 3,000 over-50s represented 9% of all successful motorcycle tests. There was also an equal number of over-50s male and female bikers passing the tests. In 2017 the number of over-50s passing their motorcycle test increased to 4,700 with the gender split of all passes being 13% for over-50s females compared to 11% for over-50s males.

Spends with Benefits

It is a consumers’ world and concepts such as brand loyalty are increasingly being challenged. Consumers are seeking easier to earn and redeem rewards related to their experience as opposed to a traditional discount. Providers might want to consider innovative rewards to differentiate their loyalty scheme for the ‘what’s in it for me’ customer. Consider rewarding loyalty in real time with ‘dynamic’ incentives which will contribute to your guests’ overall experience during their visit.

Social Business Mixers

With flexible working patterns becoming more prevalent and business travel considered a ‘perk of the job’, the line between business and pleasure is increasingly blurred. Business travellers are looking for opportunities to mix with counterparts, either to network in a new destination or simply to avoid a solitary dinner. From offering use of space for business meetings to providing communal charging points, businesses can help their guests realign their work life balance and get the most out of their business trip, personally and professionally.

Authorenticity

Visitors are trying to balance a need for exclusivity with the risks of trying something totally new. The millennials’ desire to participate in the ‘sharing economy’ is often associated with a desire to reduce costs, however, this can also provide an achievable way to seek venues that provide opportunities for immersion in local culture and authentic experiences. Creation of spaces for millennial connections with local communities and other travellers can included social-focused amenities such as food, fitness and tours.

Sensing the Change

There are around 700,000 people in the UK on the autism spectrum – that’s more than 1 in 100. Together with their families, this means autism is a part of daily life for 2.8 million people.

People with autism and their families can face barriers that others don’t when visiting tourism venues. Many of the barriers experienced are due to lack of public understanding but the nature of some venues – noisy, busy and filled with overwhelming sensory information – can also cause challenges. Pre-visit information or supporting material can help people with autism and their families to prepare themselves properly for a visit. Investing in training helps owners and staff understand autism, enabling them to feel confident communicating with people with autism or knowing how to react if someone needs additional support.

Dementia and dementia-related conditions are increasingly prevalent in our society’s ageing population and this trend is set to continue. Venues should aim to become more ‘dementia-friendly’ – both welcoming and supportive of people living with dementia and their families and carers. From clearer signage to dementia awareness training for staff, there are opportunities to make visits more enjoyable for everyone.
Final Thoughts

In Scotland, the opportunity to embrace wellness within our visitor economy is interwoven with our tourism DNA. Our landscape and open spaces, the provenance of our food and drink, our culture, and our natural and built heritage are but a few of the elements which both contribute to wellness and are naturally aligned to our current tourism offering.

So, should tourism businesses consider wellness, either specifically or tangentially in their product innovation? Wellness is a current consumer driver with a forecast for growth and wellness travellers are found to be very high-spending, high-yield tourists. In 2017, GWI reported that: “on average international wellness tourists spent 53% more per trip than the typical international tourist. The premium for domestic wellness tourists is even higher at 178% more than your average domestic tourist.” Furthermore, there are opportunities for direct and indirect wellness tourism. There are travellers whose trip and destination choice is primarily motivated by wellness – the high-yield tourists mentioned above – but for the majority of other travellers (89% according to GWI) wellness is integrated as part of the trip. For either the leisure or business traveller, wellness could be experienced through using a spa, forest walks or booking the Gin Tasting course run in the hotel bar. It is those micro-wellness experiences that enlighten the senses and feed the soul.

“For my own part, I travel not to go anywhere, but to go. I travel for travel’s sake”.

Robert Louis Stevenson
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Note: The Global Wellness Institute (GWI) is a non-profit organisation considered the leading global research and educational resource for the global wellness industry.

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Page 3: Sunset over the Isle of Arran from the Ballast Bank, Troon, Ayrshire (Paul Tomkings)
Page 5: Workshop at East Neuk Glass (Kenny Lam)
Page 6: Lochan na h-Achlaise on Rannoch Moor (Kenny Lam)
Page 8: Outdoor Spa Pool at the Gleneagles Hotel, Auchterarder, Perth & Kinross (Paul Tomkings)
Back Cover: Wrapped up warm near the Clachaig Inn, Glencoe (David N Anderson)

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