



TRENDS

that will shake the
tourism industry in
2019

Sunset in Oban overlooking the North Pier Pontoons

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.

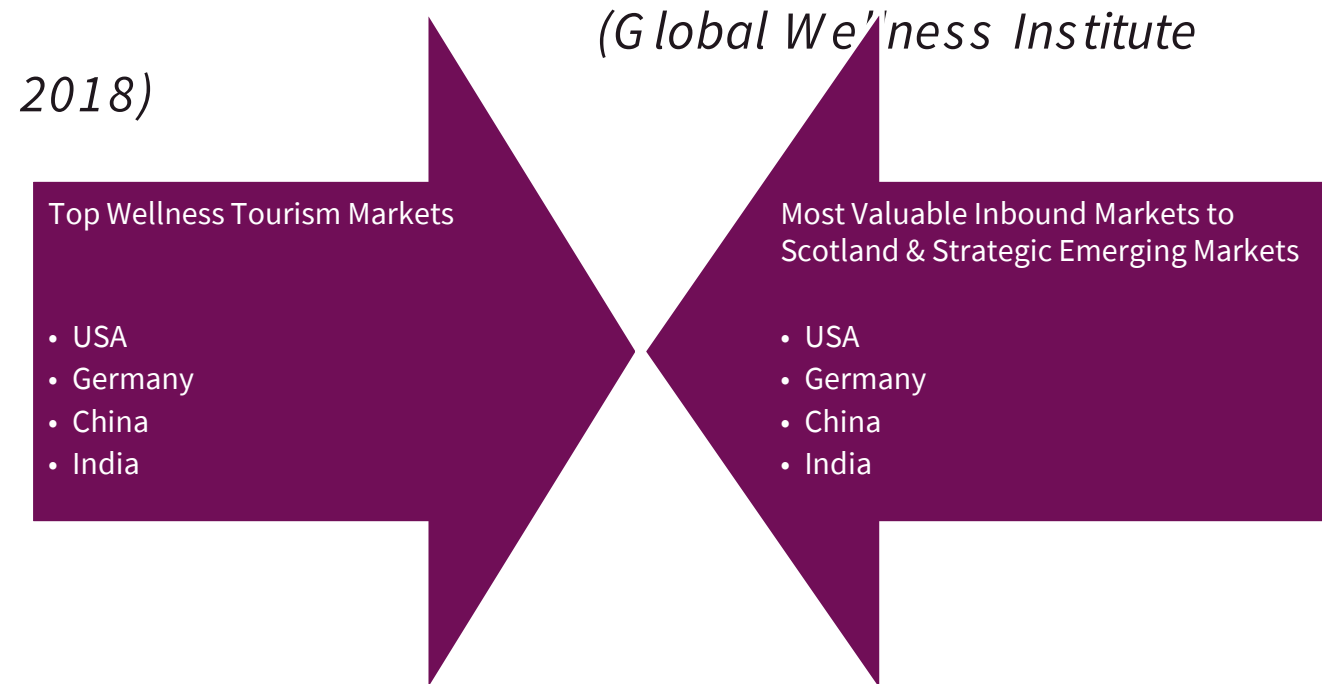


ALL IS WELL...

The United Nations World Tourism Organisation defines wellness tourism as

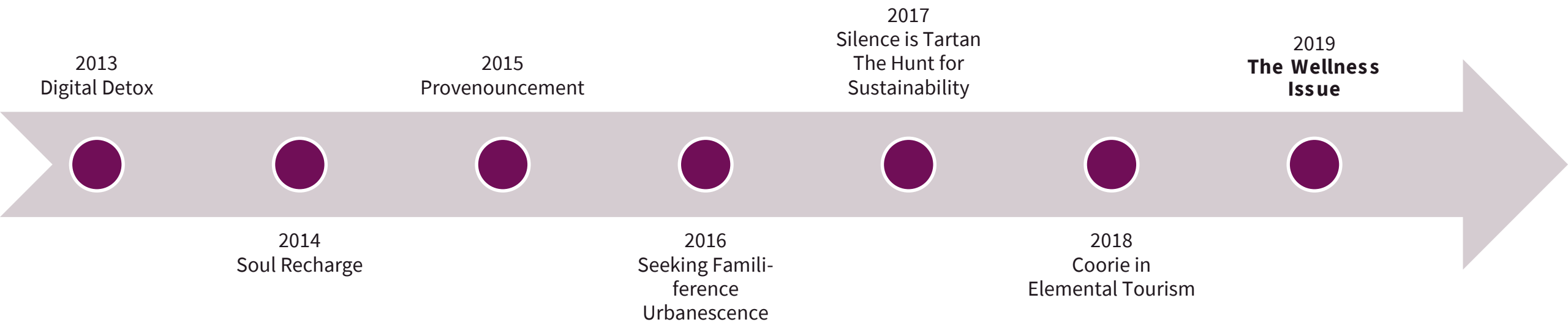
“a type of tourism activity which aims to improve and balance all of the main domains of human life including physical, mental, emotional, occupational, intellectual and spiritual”.

*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%[†]).*



WHY WELLNESS?

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.



DRIVERS OF CHANGE

The Mega-Drivers for 2019 represent the three elements of how wellness is influencing the travelling consumer:

The Art of Now - development of the individual. Self development / an appreciation of the culture and heritage of the destination. Embraces personal growth.

Sensory Tourism - immerses the visitor in the environment. Urban and rural destinations / desire for experience tangible sensations.

New Society Norms - there is a movement within society. More people are seeking something meaningful in their lives which travel can, in part, contribute to.



THE TRENDS

Unexpected Adventures

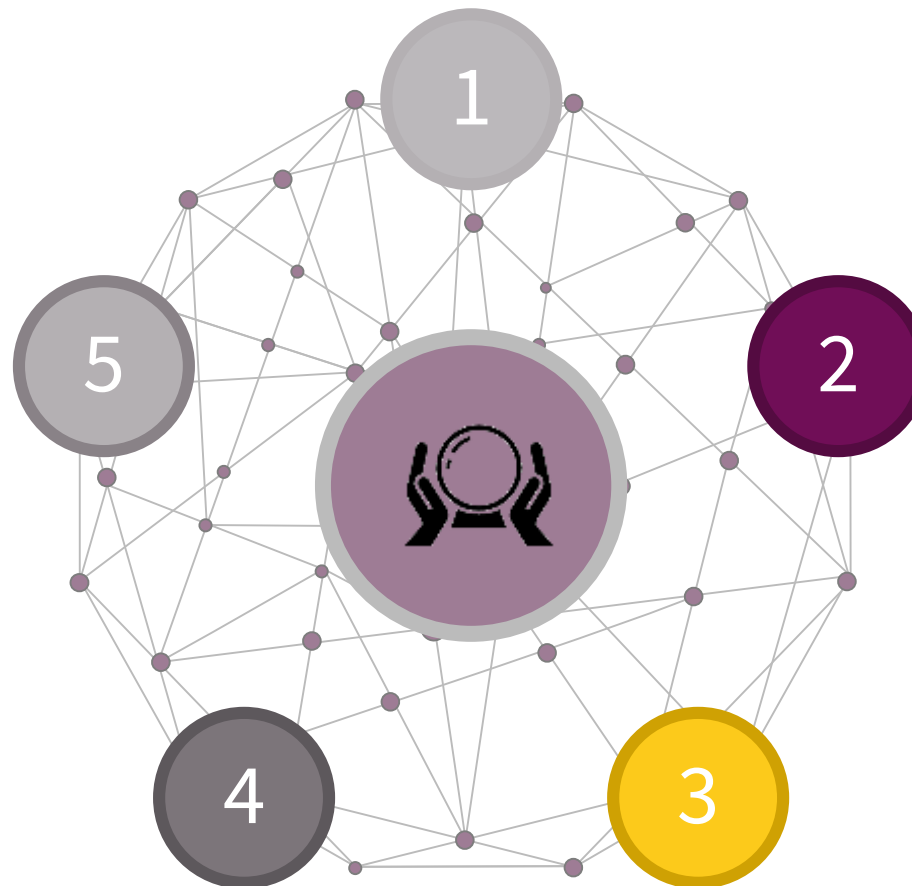
In today's perfect Instagrammable world, it is the discoveries we make when things don't go exactly to plan are often what makes an experience unique. With an increase in visitors looking for the distinctive and the authentic, this will often translate to enjoying imperfect moments. The Japanese world view of 'Wabi Sabi' is centred on embracing the beauty in the unexpected and is closely linked to self-actualisation and wellness trends.

Restorative Recreation

The emotional benefits of 'ecotherapy' are well documented, but 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.

Rise of the Artisan

Global brand availability, particularly in food and drink, has made travel increasingly homogenous. 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. By supporting local businesses visitors can experience a sense of place and live like a local.



Creative Retreats

Travel today is increasingly motivated by gathering experiences. Skills development are a growth area such as outdoor survival schools and treks 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

Authenticity

Visitors are trying to balance a need for exclusivity with the risks of trying something totally new. Opportunities for immersion in local culture and authentic experiences, connections with local communities and other travellers can be through social-focused amenities such as food, fitness and tours.

RETAIL TOURISM IS

“ A contemporary form of tourism fostered by individuals for whom purchasing goods outside their usual environment is a determining factor in their decision to travel ”

RETAIL CONSUMER TRENDS

A word cloud of retail consumer trends. The words are arranged in a roughly circular pattern, with 'Phygital' being the largest and most central. Other prominent words include 'Provenance', 'Authenticity', 'Stories', and 'Local'. Smaller words include 'Emotional Connections', 'Responsible Consumerism', 'Third Places', 'Personal', 'Socially Savvy', 'Meaningful Memories', 'Sanctuaries', 'Experiences over Objects', 'Dwell & Settle', 'Comfort First', and 'Local'.


Stories
Comfort First
Provenance
Emotional Connections
Responsible Consumerism
Third Places
Phygital
Personal
Socially Savvy
Meaningful Memories
Local
Authenticity
Sanctuaries
Experiences over Objects
Dwell & Settle

IN SUMMARY

- 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.
- Three key takeaways – What's your story, Live Local, Support your artisan.



Thank you
Questions?

 Crarae Glen Gardens, Inveraray , Argyll & Bute

Maximising the Visitor Experience

 Visit Scotland | Alba™