

SINGAPOREIMAGINE

global *conversations*

Reimagine Experiences

Understanding The New Traveller

Post-Pandemic Travel
Trends Report

WGSN





When the world stopped travelling internationally during COVID-19, the travel industry had to take a back seat and wait for restrictions to ease. Hotels, airlines, MICE organisers, and other industry stakeholders kept a close eye on travel regulations, as well as shifts in consumer priorities related to travel.

According to Google Trends¹, 'sterilisation' became a breakout global search term in 2020, growing by more than 5,000% – especially in the United Arab Emirates, Japan and Hong Kong. The future of travel reflects visitors' re-prioritisation of needs – as hygiene, safety and security become top of mind.

In the COVID-19 Recovery Dashboard Survey² conducted by the Professional Convention Management Association (PCMA) in 2021, the perceived safety of a destination is the top priority for 69% of BT and MICE event planners, reflecting the view that industry stakeholders now also expect measures for health and hygiene to be implemented, on top of their usual requirements for high-value experiences and robust networking opportunities.

While markets are in different stages of recovery, this report aims to help you understand the changing and emerging mindsets of travellers. Informed by data and insights by a global team of analysts, data scientists and researchers, WGSN's trend forecast places the post-pandemic traveller at the core of innovations, products offerings and experiences.

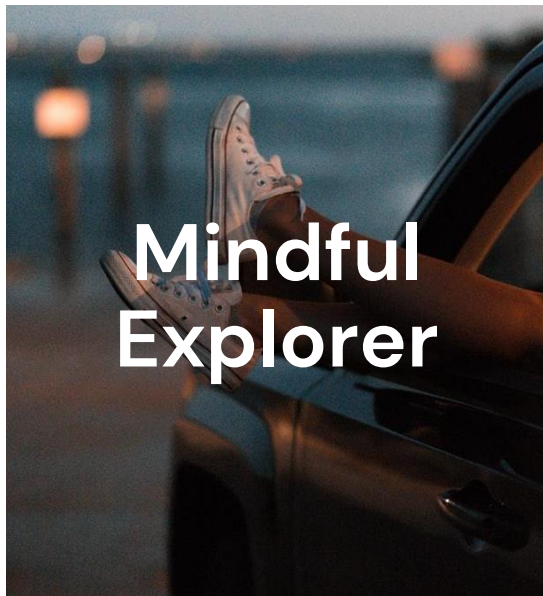
Welcome to a new age of travel with new standards and traveller demands.

Who is travelling post-pandemic?



Wander Must

While fear and anxiety will continue for some, the **Wander Must** has been waiting for months for travel borders to reopen and sees the future as a time of excitement.



Mindful Explorer

Emerging from a lengthy period of COVID-induced isolation, the **Mindful Explorer** is looking to cautiously reconnect in a new travel-enabled world.



Slow Pacer

Not only does the **Slow Pacer** have a new permanent caution when it comes to safety and hygiene, they also carry an evolved attitude to mental wellbeing and seek self-transformation.

Forecasting Framework

Macro Contextual Drivers

Analysing macro forces in Society, Technology, Economics, Politics, Industry and Culture that will impact travel.

Key Travel Need States

Changing consumer behaviours, mindsets and lifestyles with relevance to travel.

Key Trends

Trends along the travel journey that will have a transformative impact on the traveller experience, segmented based on their trend maturity.

Future Implications & Forecast

Traveller-first opportunities and action points for touch points along the travel journey.

New Traveller

Wander Must



Overview



In light of the devastation and change caused by COVID-19, collective trauma, fear and anxiety may continue for years to come. However, for the Wander Must who has been waiting for months for travel borders to reopen, this is a time of jubilation.

Visa's Green Shoots Radar Survey* (2021) revealed that Gen Y (Millennials) are the most open towards overseas travel, as 42% of those surveyed believe they are likely to travel for leisure in the next 12 months¹. This group represents the Wander Musts and their accelerated mindset of living fully in the present, a philosophy fostered during a time of adversity.

As early adopters of technology and digital experiences, they have gotten used to new ways of interaction and entertainment and are open to exploring the 'phygital', on top of physical tours.

Looking for a fresh new outlook on life, and hoping to rediscover happiness and joy, the Wander Must is all geared up and ready for the next journey, physically or virtually.

Demographic Hypothesis

Consumer Types: Millennials, Gen Z

Type of travellers: Festival Goers, Backpackers, Business travellers, MICE travellers, Workcationers

1. Visa. (2021). Green Shoots Radar Survey.

*Case studies, comparisons, statistics, research and recommendations are provided "AS IS" and intended for informational purposes only and should not be relied upon for operational, marketing, legal, technical, tax, financial or other advice. Visa Inc. neither makes any warranty or representation as to the completeness or accuracy of the information within this document, nor assumes any liability or responsibility that may result from reliance on such information. The information contained herein is not intended as investment or legal advice, and readers are encouraged to seek the advice of a competent professional where such advice is required.

Macro Contextual Driver

Post-Pandemic Yolo

Influenced by the idea that it is meaningless to plan for an uncertain future, a growing desire to live in the moment emerges.

A survey by The Travel Corporation¹ found that 100% of all US Gen Z surveyed are motivated to travel, while 63% have travel plans for 2021 despite travel restrictions. Globally, in the COVID-19 Recovery Dashboard Survey² conducted by the Professional Convention Management Association (PCMA), optimism across event planners increased from 48% in January 2021 to 69% in June. This signals that travellers and industry stakeholders alike will be looking for reasons to explore, celebrate and return to travelling like never before. With the gradual reopening of travel and markets, this post-pandemic state of “You Only Live Once” – YOLO – signifies a newfound joie de vivre.

Macro Contextual Driver

Passion Economy

A new template of work is emerging globally, accelerated by new work conventions and employee demands post-pandemic.

From the rise of remote working, to basing performance on output rather than hours, the post-pandemic passion economy is being fuelled by a new cohort of flexi-workers. Digital nomad visas and the growing interest in polywork (holding multiple jobs at the same time) among Gen Z and Millennial workers will drive new work conventions and a global movement towards workplace flexibility. A study by the social network Polywork¹ found that 64% of 21-40 year olds were already or hoped to hold more than one job in the future, whilst 72.4% of South Koreans are willing to become 'N-jobbers'² – a new crop of side hustlers taking multiple jobs to earn additional income. Thanks to technology, digital nomads from around the world are now empowered to connect virtually to take new seats at the decision-making table.

1. Digiday. (2021). The Job Juggle: Gen Z and Millennial Employees Embrace the Concept of 'Polywork'.
2. The Korean Time. (2021). Millennials, Generation Z: Money-chasers or Survivors of the Gig Economy?



Macro Contextual Driver

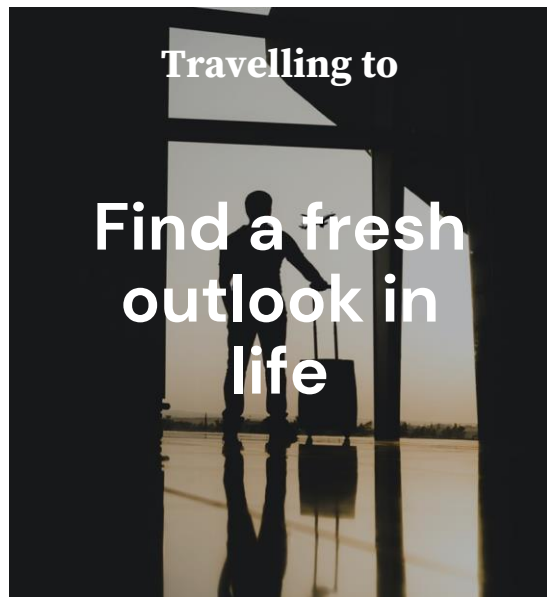
Enter The Metaverse

A new paradigm and successor of the internet that is poised to become the future of all digital media and commerce.

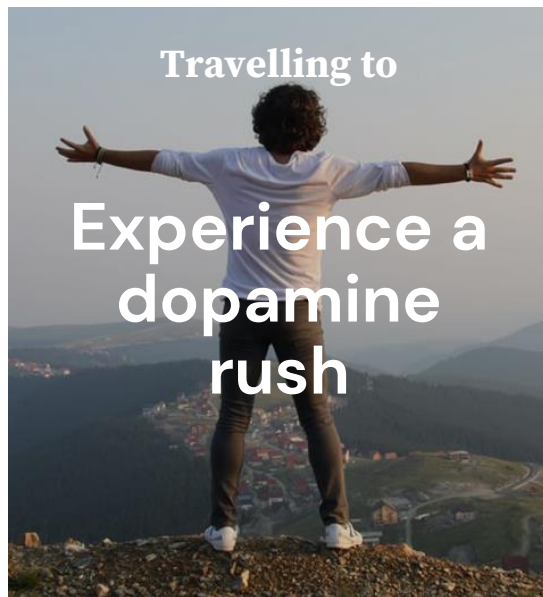
The Metaverse represents the latest evolution of the internet – a shared digital realm where new forms of expression and experiences can be shared. The digital world has become a ‘third space’ in which consumers engage in new ways of communication, learning, shopping, work, play, and travel. The ‘Reimagining Business Events – Through COVID-19 and Beyond’ White Paper¹ released in 2021 by the Singapore Tourism Board, The Global Association of the Exhibition Industry (UFI) and Professional Convention Management Association (PCMA) revealed there is a strong appetite for digital or hybrid events within the MICE sector, with respondents in Asia more than twice as likely to have participated in such events than respondents from other regions. The metaverse will unlock new potential for the travel industry now and in the decades ahead, as the sector pivots to hybrid and “phygital” events.

1. STB, UFI and PCMA. (2021). Reimagining Business Events – Through COVID-19 and Beyond White Paper.

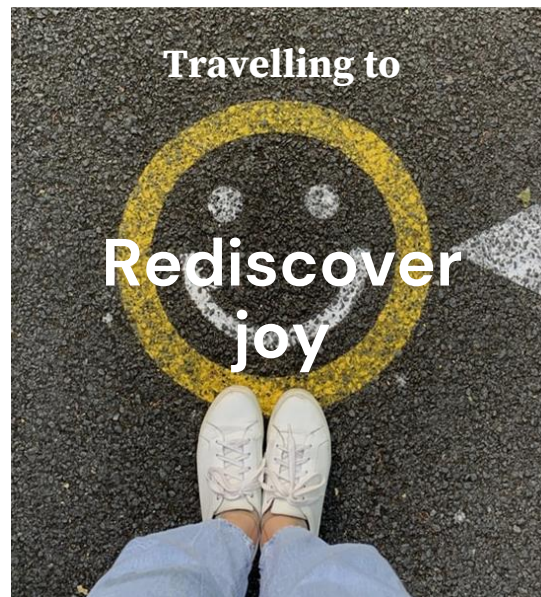
Key Travel Need States



Having been based mostly in one location, the **Wander Must** is seeking new perspectives on life and the world around them.



Newness and novelty excites the **Wander Must**. They are looking for fun, new experiences that reinvigorate them and provide that much-needed dopamine rush.



Post-pandemic, the **Wander Must** will be looking for joyful, wondrous moments that counter the uncertainty and fear.

Key Trend

Simulated Worlds



As the metaverse matures, innovative companies will embrace virtual worlds to allow consumers to socialise and shop in new immersive ways.

According to Swedish telecommunications company Ericsson¹, half of the world's smartphone users predict AR glasses will become the norm by 2025. For the Wander Must, an early adopter of tech, virtual reality and simulated experiences will increasingly become part of their lives, driving new expectations for brand engagement. In November 2020, in lieu of its physical locations, Disney announced a Disney Theme Park Metaverse which uses data to unlock storytelling and personalisation virtually². While the full potential of the metaverse will not be realised for decades, this emerging trend will gradually transform the traveller's journey. With virtual reality and simulated worlds becoming a viable opportunity for enhanced entertainment offerings, we see many businesses starting to explore this space more extensively.

1. Ericsson. (2019). 10 Hot Consumer Trends 2030.

2. Mandadi, Talik. (2021). How Physical+Digital is Driving the Present and the Future of Disney Parks

Virtual and simulated entertainment offerings

American multinational entertainment and record label conglomerate **Warner Music Group** is entering the digital simulation space through partnerships that create new and immersive entertainment experiences.



Virtual character inspired and modelled after DJ KSHMR in the popular Battle Royale game, Free Fire, made possible by WMG's partnership with Garena.

Photo Credit: Warner Music Group

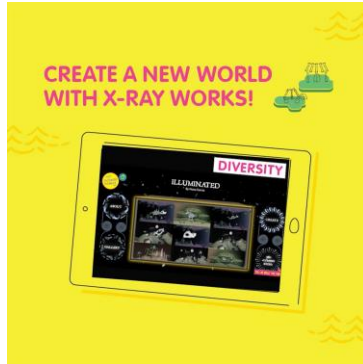
Recognising the rise of the metaverse, Warner Music Group (WMG) has embarked on a number of partnerships to further its foray into the digital simulation space in 2021. A partnership with Genies, the world's largest avatar technology company, allowed WMG's artists to produce and distribute virtual beings that facilitate fan reach across immersive platforms and metaverses, while a partnership with virtual entertainment company Wave helped pioneer virtual performances and fresh experiences for WMG's global roster.

Collaborations with social gaming platforms such as Roblox, which hosted exciting virtual concerts with the likes of popular singer Ava Max, further show WMG's ambition to reimagine the future of music.

These new partnerships come off the back of WMG's previous partnership in the digital simulation space with online local game developer Garena in 2020, when label artist DJ KSHMR became the brand ambassador of the mobile game Free Fire.

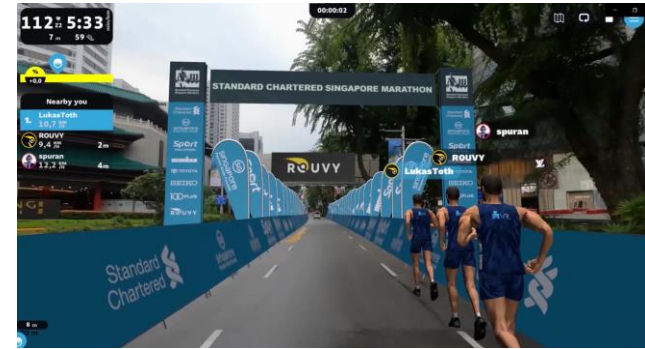
The integration of the digital with the physical

One of the world's leading visual arts institutions, **National Gallery Singapore**, and the largest operator of mass participation sports in the world, **IRONMAN Group**, have found new ways to organise their signature events.



National Gallery Singapore's Children's Biennale 2021
Photo Credit: [National Gallery Singapore](#)

Returning for its third edition, National Gallery Singapore transformed its Children's Biennale into a “phygital” experience for the first time, bringing the event to children around the world. With an online programme featuring games and immersive animated stories to complement on-site art installations, the hybrid format introduced new ways for children to experience art and imaginative play.



Standard Chartered Singapore Marathon Augmented Reality Race
Photo Credit: [Rouvy](#)

The 2020 Standard Chartered Singapore Marathon (SCSM) featured a hybrid race format, where runners had the option to either run with a compatible tracking device, or on a treadmill to experience the immersive Augmented Reality (AR) format incorporated by IRONMAN Group. This mode allowed participants to create avatars and see themselves competing with other runners in real-time with specially curated AR routes.

Exploring simulated worlds through novel partnerships

Singapore's most iconic hotel, **Raffles Singapore**, teamed up with local entertainment houses, **Double Confirm Productions** and **Sight Lines Entertainment**, to produce possibly the world's first virtual interactive play in a hotel space.



The promotional poster for the first-of-its-kind virtual interactive play "*The Curious Case of The Missing Peranakan Treasure*", produced by Double Confirm Productions and Sight Lines Entertainment, in collaboration with Raffles Hotel Singapore.

Combining the best of theatre, technology, and hospitality, Raffles Singapore embarked on a novel partnership with Double Confirm Productions and Sight Lines Entertainment to produce a first-of-its-kind virtual interactive play titled "*The Curious Case of The Missing Peranakan Treasure*". Directed by popular local actor/director Hossan Leong, the play was filmed and set in the grand hallways of the iconic hotel.

Providing a truly unique and memorable experience, participants could choose to investigate mystery through a pure virtual gameplay option, or participate in the exclusive experiences on-site through a "daycation" or staycation package. The integration of luxury and digitalisation created a new hybrid experience that guests could enjoy from the comfort of their suites or homes, from anywhere in the world.

With its first edition in June selling over 1,000 tickets three weeks after launch, its overwhelming popularity has prompted a rerun until January 2022.

Key Trend

Intentional Communities



As the pandemic confined people to their homes, turning to new digital realms to connect and soak in cultures across borders becomes a norm.

According to Dazed's Future of Gaming report¹ released just this year, 52% of gamers play for social connection, followed by escapism (44%) and then shared moments (33%). As COVID-19 has accelerated the shift of communities from offline to online, consumers and the newness-seeking Wander Must will look increasingly to community-centric platforms that enable novel ways to connect. From new audio communities and social apps like Clubhouse and Cappuccino, to inclusive communities for gamers and surfers, the desire to become part of intentional communities is set to grow for travellers.

Key Trend

Mood Boosters



Mood boosting experiences emerge to support the escape from a prolonged period of anxiety and boredom.

Boredom skyrocketed in 2020, with 53% of US consumers admitting they experienced it more during the pandemic¹. With many regions moving on, mood-boosting experiences and messaging act like a collective release following a unique period of constraint. Globally, there is hype around building optimism through positive psychology. Apps such as ResilientMe and Happify fuel consumers' optimism and sense of life satisfaction. A trend set to have mass relevance for consumers across age ranges in the future, travellers will be hungry for journeys and experiences that bring joy to the everyday, reflecting the desire to celebrate and feel optimistic for the future.

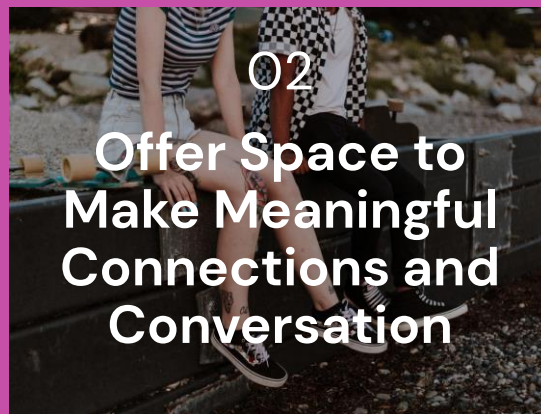
1. University of North Carolina at Chapel Hill and at Harvard Medical School. (2020). The U.S. National Pandemic Emotional Impact Report.

Future Implications & Forecast

How to target the Wander Must?



Begin to wrap your head around immersive virtual spaces and experiment with new communication and commerce opportunities.



Explore how your brand's physical or virtual destinations can benefit your community beyond content.



Engage with customers by understanding the full spectrum of their emotional need states.

Wander Must

Macro Contextual Drivers

Post Pandemic Yolo

Passion Economy

Enter The Metaverse

Key Travel Need States

Find a Fresh Outlook in Life

Experience a Dopamine Rush

Rediscover Joy

Key Trends

Simulated Worlds

Intentional Communities

Mood Boosters

Future Implications & Forecast

Enter the Metaverse Now

Offer Space to Make Meaningful
Connections and Conversation

Unpack Customer's
Emotive Needs

New Traveller

Mindful Explorer



Overview



Emerging from a lengthy period of COVID-induced isolation, the Mindful Explorer is looking to cautiously re-engage in a new travel-enabled world.

Driven by increased awareness of the fragility of our system, the Mindful Explorer has an increasing desire to access sustainable choices at the micro-level. They transform negative emotions into action, making efforts to change their way of travelling to minimise negative impact.

Hoping to build deeper ties with their neighbours and local environments, the Mindful Explorer is driven to better engage with local communities and events.

While nature became a healer during a period of upheaval, you will see the Mindful Explorer incorporating nature and the outdoors in travel routines.

Demographic Hypothesis

Consumer Types: Gen Z, Millennials, Gen X

Type of travellers: Young Families, Outdoor Enthusiasts, Bikers, Trekkers, Train travellers, Roadtrippers, Backpackers, Campers, Off-season travellers

Macro Contextual Driver

From Jet-setting to Trekking

A growing appreciation for nearby locales drives new travel journey types and destinations.

Consumers have adapted itineraries, journey types and destinations domestically over COVID-19. Instead of travelling to other places, many started exploring their country's own 'backyards', discovering the convenience, safety and fun from it. A 2020 survey by Outdoorsy found that 72% of Americans plan to take more road trips due to new flexible working arrangements¹. In Visa's Green Shoots Radar Survey* (2021), participants from Taiwan spent almost half of all their initial travel budget (43%) on localised travel and staycations amid the pandemic². Motivated by a newfound appreciation for nearby locales, consumers will increasingly choose train, boat, road trips and even trekking instead of air travel. Hence, brands are starting to cater to this cohort – JR Kyushu has launched a new luxury sightseeing train catering to remote island locations in Japan.

1. Outdoorsy, (2020), Road to Wellness Survey.

2. Visa, (2021), Green Shoots Radar Survey.

*Case studies, comparisons, statistics, research and recommendations are provided "AS IS" and intended for informational purposes only and should not be relied upon for operational, marketing, legal, technical, tax, financial or other advice. Visa Inc. neither makes any warranty or representation as to the completeness or accuracy of the information within this document, nor assumes any liability or responsibility that may result from reliance on such information. The information contained herein is not intended as investment or legal advice, and readers are encouraged to seek the advice of a competent professional where such advice is required.

Macro Contextual Driver

The Great Migration

Consumers are rediscovering the great outdoors as they move away from urban epicentres to get closer to nature.

Enabled by the rise of remote work and fuelled by the need for more space, consumers are increasingly relocating from urban epicentres to less centralised communities during the pandemic. For instance, in 2020, cities such as San Francisco¹ and New York² are reporting that 80% more people are leaving the city than moving in. A 2020 study³ in Japan also found that 49.8% of people wish to live in the countryside in the future. This migration serves to accelerate an increasing interest in the great outdoors, impacting future travel itineraries and destinations.

1. San Francisco Chamber of Commerce. (2021). Citybeat Poll 2021.

2. Financial Times. (2020) From Peak City To Ghost Town: The Urban Centres Hit Hardest By Covid-19.

3. DW Akademie. (2020). Coronavirus: More Japanese to Swap Urban Life for The Countryside.



Macro Contextual Driver

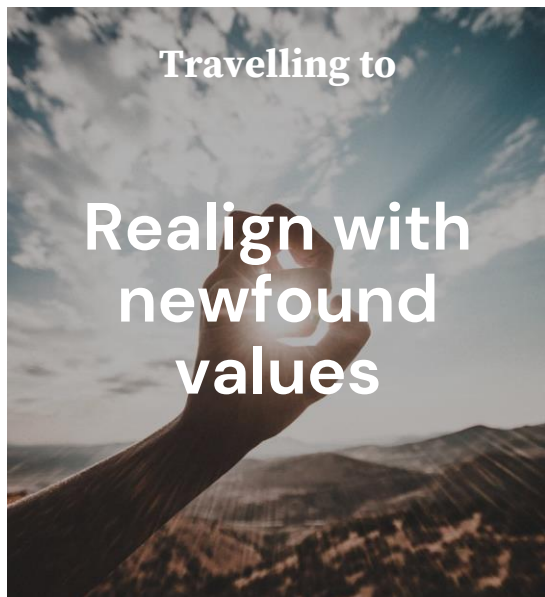
Local Solidarity

Combating adversity and uncertainty through community bonding and a desire to regenerate the local.

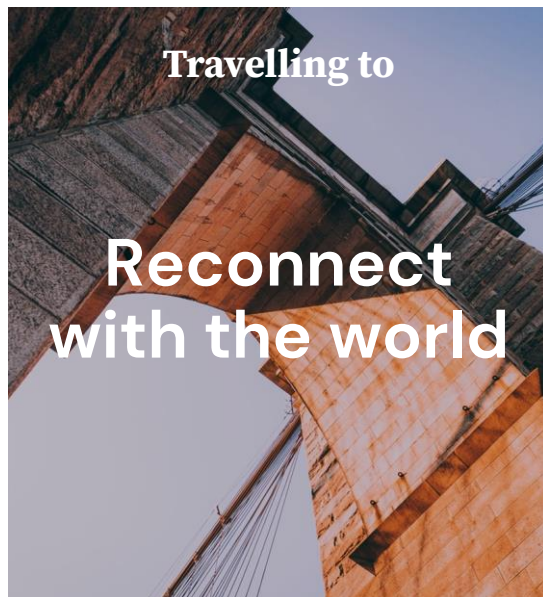
In many regions, the pandemic has exposed systemic gaps and fragility. The anxiety induced by the pandemic's uncertain outcome resulted in people strengthening local bonds to fill in the gaps left by the perceived inaction of institutions. Data from the UK's Office for National Statistics (2020) showed 62.6% of citizens had checked in on neighbours who might have needed help in the last week¹. As the pandemic accelerates de-globalisation and the prioritisation of the local, micro-local communities will assume greater importance in society, which in turn influences where travellers place their attention for their next trip.

1 UK Office for National Statistics. (2020). Opinions and Lifestyle Survey 2020.

Key Travel Need States



Transforming negative emotions into action, the **Mindful Explorer** makes efforts to change their way of travelling with new conscious values.



Emerging from lockdown lifestyles, the **Mindful Explorer** is cautiously motivated to seek new ways of re-engaging with the world via new experiences and travel.



Committed to local micro communities, the **Mindful Explorer** is more than willing to bond with and empower people in each locale.



Key Trend

Age of Locals



As consumers and businesses build deeper ties with their neighbours and local environments, independent voices will come to the fore, with a new generation of businesses celebrating their roots.

Singapore's "Made with Passion" national initiative¹ is an example of how active steps can be taken to engage the locals. Celebrating iconic lifestyle brands that bring to life Singapore's spirit of turning possibilities into reality, the initiative puts brands such as Bengawan Solo, Bee Cheng Hiang and Gryphon Tea company, front and centre in consumers' minds. Regenerating the local will only become more and more important to the masses as they are inspired by Mindful Explorers who go the extra mile to support local supply networks and invest in local communities.

¹ Visit Singapore. (n.d.). About Made With Passion.

Localisation delivered through authentic storytelling

Singapore tour operator **Tribe**, which specialises in curating authentic tours to offer participants hyperlocal experiences, continues to tell classic Singapore stories even during the pandemic.



Tribe's 'Behind-The-Scenes' Killiney – From Coffeeshop to Factory livestream tour continues to provide hyperlocal experiences during COVID-19.

Photo Credit: Tribe

The pandemic affected many tourism businesses, none more than the tour operators that were suddenly faced with a sharp decline of tourists. They had to quickly innovate to reach their audiences, all while maintaining authentic storytelling.

Testimony to this transformation was Tribe who pivoted and introduced a series of interactive 'Behind-The-Scenes' livestream tours, curated to spotlight and tell authentic stories of Singaporean neighbourhoods, their cultures, and their traditional craftsmen. These included visits to the local-favourite traditional rainbow bread factory, as well as an intimate look into how Killiney – one of Singapore's oldest coffee shops – makes their traditional coffee and toasts, and more.

Tribe also implemented more tactical elements like delivering special snack platters to participants' homes, which helped further enrich the local experience and delighted participants.

Key Trend

Outdoor Boom



The outdoors is incorporated into travel routines, accelerated by the desire to get closer to nature during a period of upheaval.

Nature is a great healer. In 2021, Pinterest¹ observed a 100% uptick in year-on-year searches for 'forest resort' and a 35% increase in searches for 'mountain travel'. As consumers increasingly move to, or visit rural areas of their own countries, we are seeing the rise of an Outdoor Boom. People are looking for ways to better incorporate nature and the outdoors into both daily as well as weekend travel routines. Fuelled by the desire for safe, custom itineraries and small-group tours, premium adventure holidays will emerge, accelerating the rise of safaris and expeditions when travel borders reopen.

¹ Pinterest. (2021). Pinterest Predicts 2021.

Immersing art in nature

Local lifestyle group **Hustle & Bustle** partnered with iconic Singapore attraction, **Gardens by the Bay**, to bring large-scale installations from famed American glass artist Dale Chihuly to its garden space.



An installation from *Dale Chihuly: Glass in Bloom*, Chihuly's first major garden exhibition in Asia.

Photo Credit: *Ethereal White Persian Pond*
Gardens by the Bay, Singapore
© 2021 Chihuly Studio. All rights reserved.

The arts sector in Singapore was badly impacted during the pandemic. Continuing to offer exciting art exhibitions, especially those originating internationally, became a challenge as visitor numbers to galleries and museums declined during this period.

Despite these challenges, Hustle & Bustle and Gardens by the Bay worked closely to bring the *Dale Chihuly: Glass in Bloom* exhibition to Singapore in 2021. The exhibit complemented both indoor and outdoor spaces within Gardens by the Bay, showcasing over 100 vibrant, large-scale installations and artworks in what is also Chihuly's first-ever major garden exhibition in Asia. The US embassy in Singapore was also involved in the collaboration, organising activities such as fused glass jewellery and swizzle stick workshops for visitors to create their own glass accessories.

This partnership is one of Gardens by the Bay's many initiatives to marry the modern with the natural, creating a new outdoor experience that sets the benchmark for other garden attractions around the world, while making it accessible for locals to enjoy.

Key Trend

Regenerative Tourism



The increasing desire to access sustainable choices at the micro level is driven by greater awareness of the fragility of the globalised system.

Regenerative tourism is emerging out of its niche market. In China, COVID-19 has accelerated greener consumption with 73% of China's population supporting a green recovery post-pandemic, compared to 49% in America and 57% in Europe in 2020¹. Sustainability is also becoming a key consideration for the MICE sector. The Status of Sustainability in the Exhibition Industry Report² released in July 2021 by the UFI found that 58% of both exhibitors and visitors consider improving their environmental impact to be increasingly crucial to the sector's long-term success. Sustainability has shifted from optional to an imperative for businesses. Local economies, businesses and event organisers should enable travellers to access sustainable choices at the micro-level, co-creating a new era for tourism that is conscious of its impact on the ecology.

Future Implications & Forecast

How to target the Mindful Explorer?

01

Enable Local Prosperity

Leverage the power of your brand and promote your locally-owned status and involvement with the community.

02

Develop an Outdoor Product and Experience Ecosystem

Offer consumers a one-stop, end-to-end journey and ensure the product experience is seamless and convenient.

03

Prioritise Sustainability

Explore how your actions can play a part in sustaining and eventually regenerating the wider ecosystem in the locale.

Mindful Explorer

Macro Contextual Drivers

From Jet-setting to Trekking

The Great Migration

Local Solidarity

Key Travel Need States

Realign with Newfound Values

Reconnect with The World

Empower The Local Community

Key Trends

Age of Locals

Outdoor Boom

Regenerative Tourism

Future Implications & Forecast

Enable Local Prosperity

Develop an Outdoor Product and
Experience Ecosystem

Prioritise Sustainability

New Traveller

Slow Pacer



Overview



Health and wellness has been a rising consumer priority for some time, but COVID-19 has added a new dimension. The Slow Pacer is a consumer who has slowly and sensibly adapted to their pandemic lifestyles.

Not only does the Slow Pacer have a new permanent caution when it comes to safety and hygiene, but an evolved attitude to mental wellbeing is also high up on their agenda.

Dedicated to carving out their downtime for quality rest, the Slow Pacer seeks purpose through travel and new experiences.

Looking for wholesome experiences, wellness destinations and transformational journeys to embark on, the Slow Pacer wants to become better versions of themselves.

Demographic Hypothesis

Consumer Types: Millennials, Gen X, Boomers

Type of travellers: Multi-generational travellers, Business travellers, MICE travellers, Staycationers, Wellness Seekers, Short Trippers

Macro Contextual Driver

Normalised Downtime

Consumers carve out time for relaxation as they are driven by the increased awareness of getting a good rest.

Slowed-down lifestyles have introduced consumers to new or forgotten concepts around rest. According to a 2020 study by Airtasker¹, the move to remote work is allowing people to save time and relax more, with remote workers saving an average of 34 hours of leisure time per week compared to office workers. There is a return to ritualised mealtimes, increased sleep, nights in, a return to slower leisure activities and hence an increased desire for slow travels too. Rest is no longer a luxury, but a normalised way of life.

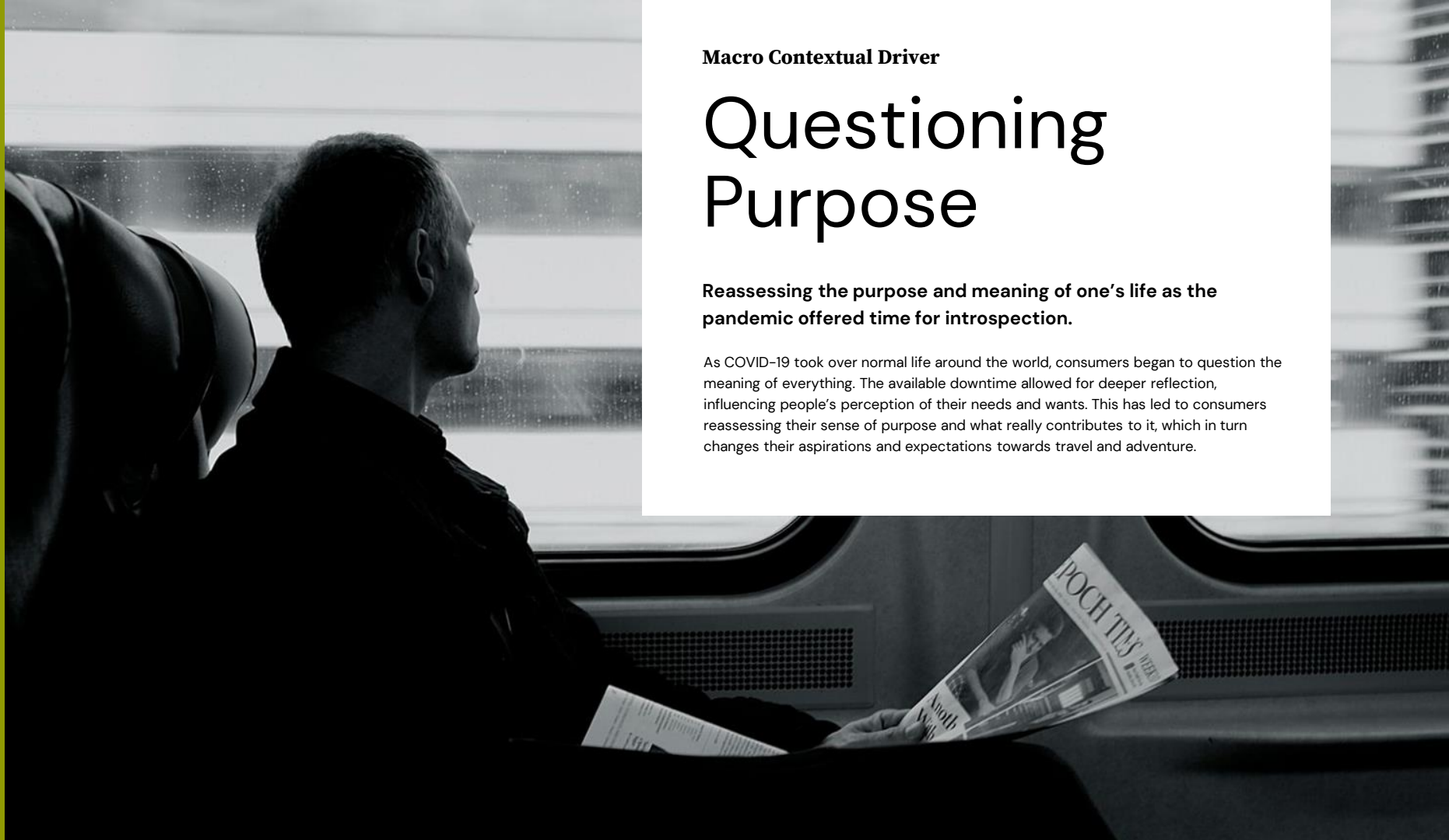
¹ Airtasker. (2020). The Benefits of Working from Home.

Macro Contextual Driver

Questioning Purpose

Reassessing the purpose and meaning of one's life as the pandemic offered time for introspection.

As COVID-19 took over normal life around the world, consumers began to question the meaning of everything. The available downtime allowed for deeper reflection, influencing people's perception of their needs and wants. This has led to consumers reassessing their sense of purpose and what really contributes to it, which in turn changes their aspirations and expectations towards travel and adventure.



Macro Contextual Driver

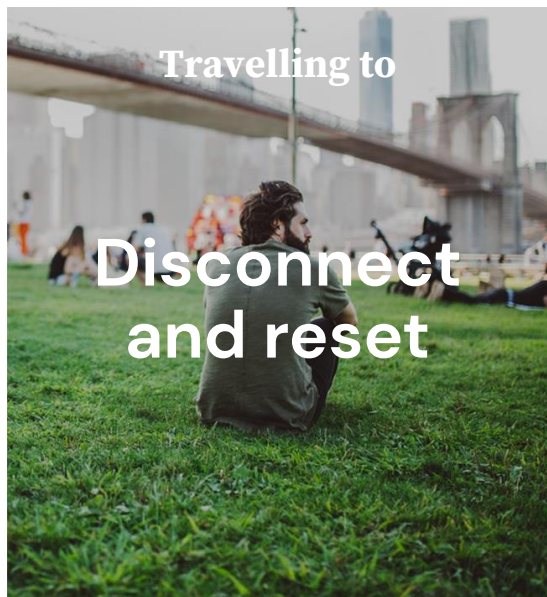
Mental Health Tsunami

Record levels of emotional burnout are taking place worldwide, accelerated as the pandemic lingers on.

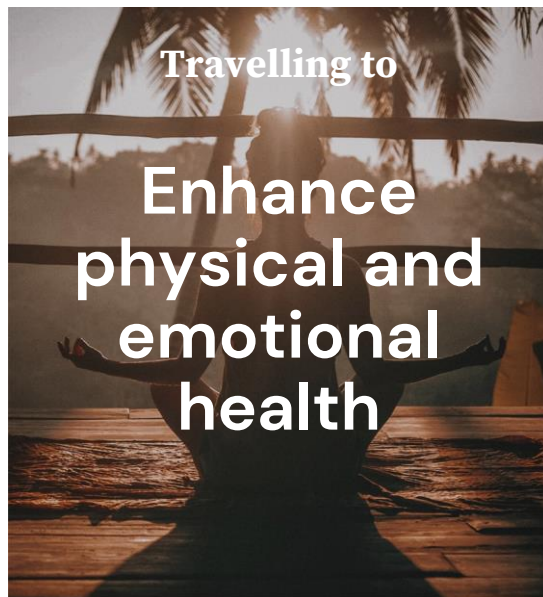
The Slow Pacer is navigating through an unprecedented amount of uncertainty as well as an accelerating mental health crisis. According to a report by the US Center for Disease Control and Prevention¹ from June 2020, over 40% of respondents in the US reported at least one adverse mental health condition, including symptoms of anxiety disorder and depressive disorder. Characterised by physical, emotional and mental exhaustion, record levels of emotional burnout are taking place worldwide across generations.

1. US Center for Disease Control and Prevention. (2020). Mental Health, Substance Use, and Suicidal Ideation During the COVID-19 Pandemic.

Key Travel Need States



Increasingly aware of the importance of rest, the **Slow Pacer** is seeking to incorporate a new schedule when they travel. Instead of hustling around for newness, they would rather dedicate time to disconnect and rest in their itinerary.



Recognising the importance of mental health, the **Slow Pacer** travels to enhance their physical and emotional wellbeing, driving interest in slowed-down active hobbies.



In the wake of the pandemic, travel enables the **Slow Pacer** to seek meaning in their lives.

Key Trend

Wellness Destinations



Newly
Emerging



Growing
Impact



Becoming
Mass

Consumers are hungry for sensorial moments of self-care, accelerated by a prolonged period of isolation and the global health crisis.

After losing a year of opportunities to the pandemic, over half of US travellers view travel as a healing experience according to Expedia's 2021 Travel Trends Report¹. While wellness is not a new trend, the newness comes from unexpected partnerships and itineraries, as we see the rise of wellness destinations that take an integrated approach to health. Look to Tri Vananda, a multigenerational wellness resort that is being developed in Thailand, which will comprise a wellness residential community, a comprehensive medical and wellness centre, as well as a wetland nature reserve. As the Slow Pacer seeks innovative healing experiences, they will bring this desire to live better, healthier and stronger when they travel for both business and leisure.



Key Trend

Soft Adventures



Newly
Emerging



Growing
Impact



Becoming
Mass

The rise of easy journeys that balance safety and comfort without sacrificing the adrenaline rush of an adventurous experience.

According to hospitality group Accor¹, 77% of travellers are prioritising sanitation and safety in 2021. In response to these expectations, there has been a surge of easy journeys, or “soft adventures”, that still invoke thrills and wonder while catering to social distancing regulations. Examples include transparent beachfront bubble pods that provide an alternative overnight experience for guests staying at the Amilla Maldives² (2021) and Banyan Tree’s luxury tented camp resort that is set to open in Saudi Arabia in 2022³ (2021). A trend that is growing in mass importance, Slow Pacers lead the way in enjoying activities that require little skill and offer optimum security.

1. Accor. (2021). ACCOR TRAVEL REPORT: The Future Of Travel In 2021 And Beyond - From Resilience To Recovery.

2. eHotelier. (2021). Amilla Maldives Unveils Ultimate Glamping Experience.

3. Banyan Tree (2021). Welcome to Banyan Tree AlUla (Opening Q4 2021).



Key Trend

Transformational Journeys



Combating pandemic fatigue and seeking new meaning in a new world.

In search of fresh purpose, Slow Pacers are reassessing what really matters in their lives. This includes seeking innovative travel experiences that allow them to transform into healthier and happier versions of themselves, mentally and physically. As such, we see hotels capitalising on this growing trend. The Preidlhof resort¹ in Italy, which has upgraded its packages in response to the pandemic in 2021, now offers a *Transformational Journey* retreat that involves “anxiety unblocking” and “energy releasing” massages. The W Hong Kong’s Bliss Spa² launched in 2019 was the first location in APAC to offer a VR-infused treatment that features a voiceover that reminds the visitor to be aware of themselves in the present moment. While modern life travels at breakneck speed, the Slow Pacer requires businesses to embrace a new energy and weave the “slow movement” into their core ethos and offerings.

1. PREIDHOF Luxury DolceVita Resort. (2021). Transformational Journey.

2. South China Morning Post. (2019). Spas and VR: new stress busting wellness experiences see you travel the world – even the moon – for meditation and relaxation.

Rejuvenation for the soul

Travel and lifestyle company **Blue Sky Escapes**, which specialises in unlocking extraordinary experiences around the world, pivoted to provide wellness experiences to help others with healing and recharge.



A guided meditation session held during the *An Emergence of Self* wellness retreat organised by Blue Sky Escapes.

Photo credit: Blue Sky Escapes

The pandemic has created an increased demand for wellness retreats and getaways, encouraging people to slow down and reflect. With everyone grounded and unable to travel, Blue Sky Escapes shifted its focus on helping others to travel inwards and discover their inner landscapes to empower them to better navigate these times.

Answering the call for a mental and spiritual break amid the gloom and doom of the pandemic, the company curated a series of 3D2N wellness retreats – *An Emergence of Self*, set in the heart of Singapore's Labrador Nature Reserve, a perfect cocoon away from the city. The retreats focus on restoring wellness through sessions such as active meditation, mindful movement, the practice of silence, sound healing, as well as nourishing plant-based meals.

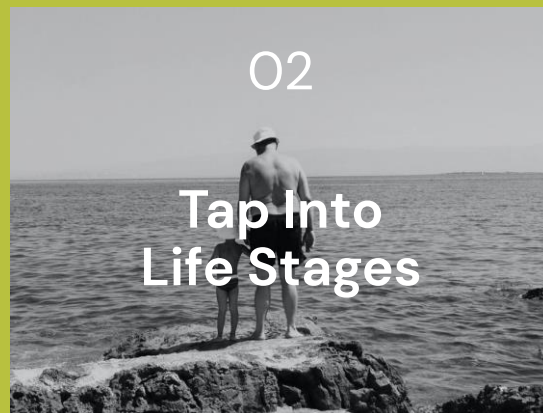
With a growing waitlist for subsequent editions, the company managed to provide a safe and nurturing space for participants to recover from the fatigue of the pandemic, unfold into the core of their being, and then re-align and emerge more resilient into the outer world.

Future Implications & Forecast

How to target the Slow Pacer?



Reimagine experiences that provide opportunities for a moment of clarity and inspiration.



Incorporate products and services that respond to specific physiological and emotional life stages of customers.



Design wellbeing into the customer journey and create a sense of relief and comfort through customer care.

Slow Pacer

Macro Contextual Drivers

Normalised Downtime

Questioning Purpose

Mental Health Tsunami

Key Travel Need States

Disconnect and Reset

Enhance Physical and
Emotional Health

Rediscover Sense of Purpose

Key Trends

Wellness Destinations

Soft Adventures

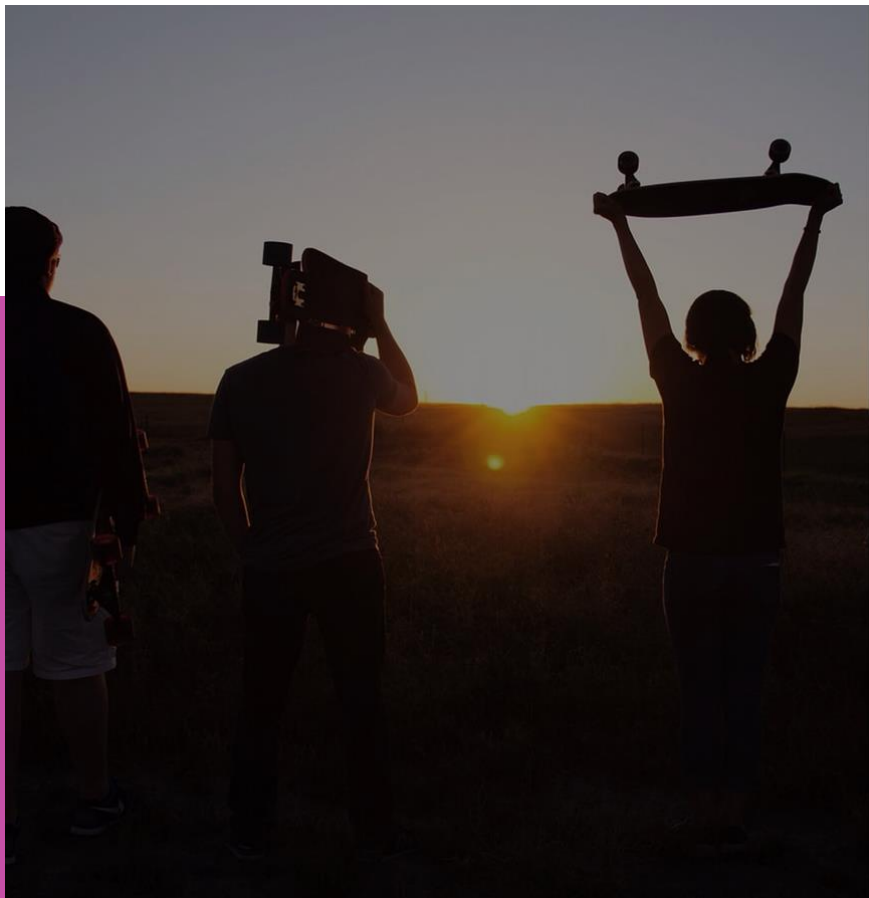
Transformational Journeys

Future Implications & Forecast

Enable Self Discovery and
Transformation

Tap Into Life Stages

Design Journeys of Wellbeing



The pandemic resulted in significant shifts apparent in the new wave of travellers' heightened mindsets, behaviours and needs.

Besides looking at demographic segments, it is essential to design for specific sentiments, need states and values, from looking out for novelty to purpose in the post-pandemic era. Companies need to create distinct messaging and experiences that will fulfil these new desires, aligned with the needs of differentiated personas. Innovate and create products and services that resonate to expand your customer base – this report shares a number of exceptional case studies testament to the possibilities of leveraging these trends and insights early to make that necessary pivot.

Do not forget traveller's safety considerations. It should be a core part of your value proposition, which will instil confidence in your customers. By communicating cleanliness and safety as part of your brand messaging, you will not only reassure your consumers but also differentiate your offerings.

Finally, there is no one-size-fits-all for businesses looking to reignite travellers' wanderlust. Each business would need to be deliberate about their strategy and approach to suit evolving conditions and shifting traveller needs. Identify and establish new partnerships to collectively recapture mindshare with shared resources.

The future is bright and full of opportunities – it is up to you how you make sense of the signals of the future we are seeing today.

Research Toolkit



For this project, WGSN's team of global consultants scan their local and regional markets to build research and analysis for the report. Our research toolkit includes:

Proprietary WGSN Research

Including WGSN.com, Barometer, Trend Curve, WGSN Image Bank, Ascential Group Research, WGSN expert opinion, WGSN Insight, Trade show and industry event coverage.

Bespoke Secondary Research

Including such sources as retail, sustainability & CSR Intelligence, Government white papers & report, Financial Institution, Annual Spending Reports, Census information, Festivals & Event Coverage, Data Tracking.

Analysis

WGSN Consultants conduct the analysis phase and interpret the research through your brand lens. With your specific briefs front of mind, we outline what the trends mean for your brand and how they can be interpreted for your short, medium and long term strategies.

Consumer Mapping

WGSN proprietary mapping frameworks are customised to suit you brief and objectives. Proprietary and bespoke research is collated and mapped onto these frameworks to identify the customer portraits.

Innovators & Disruptors

Cross category insights into new movers, disruptors or innovators. Learning from startups, entrepreneurs, thought leaders and unique collaborations that move products and services into new realms.

Thank you