

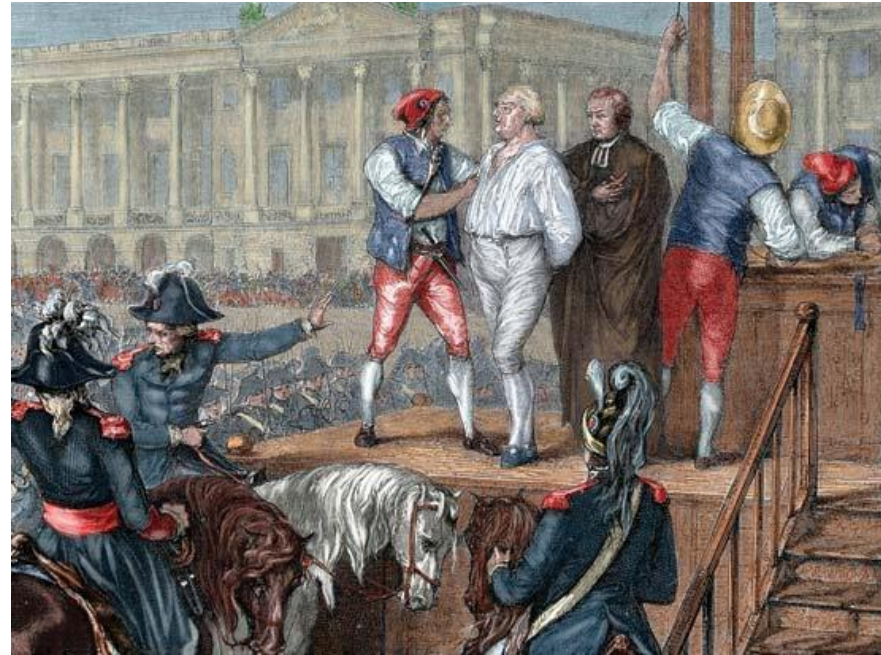
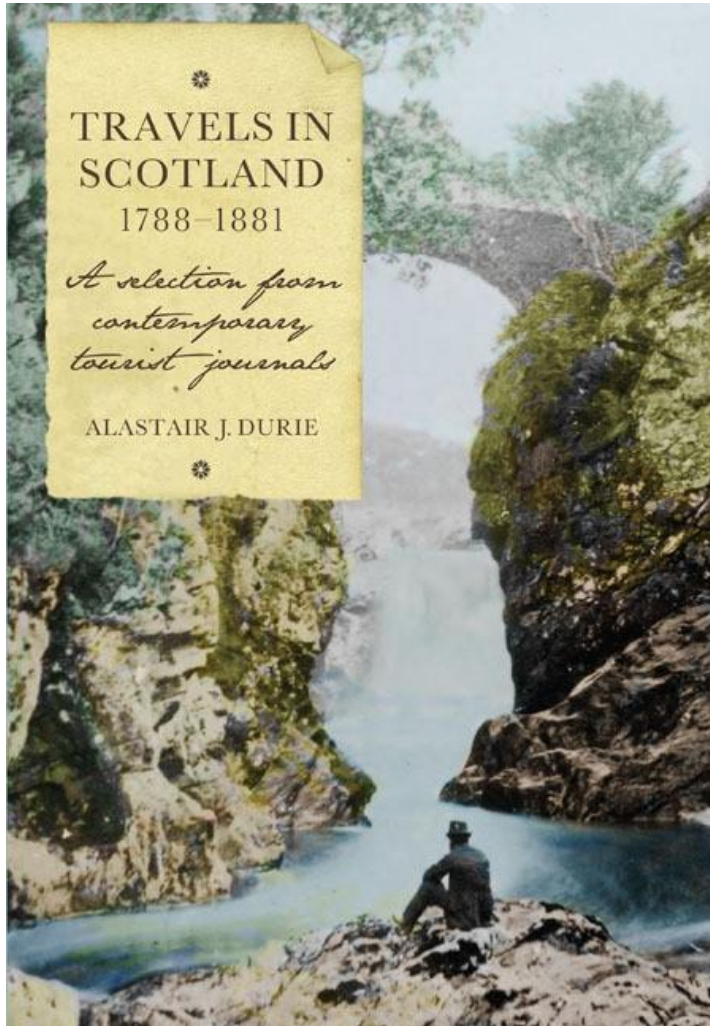
The Future Tourist:

Fluid and Simple Identity

Dr Ian Yeoman

Victoria Business School

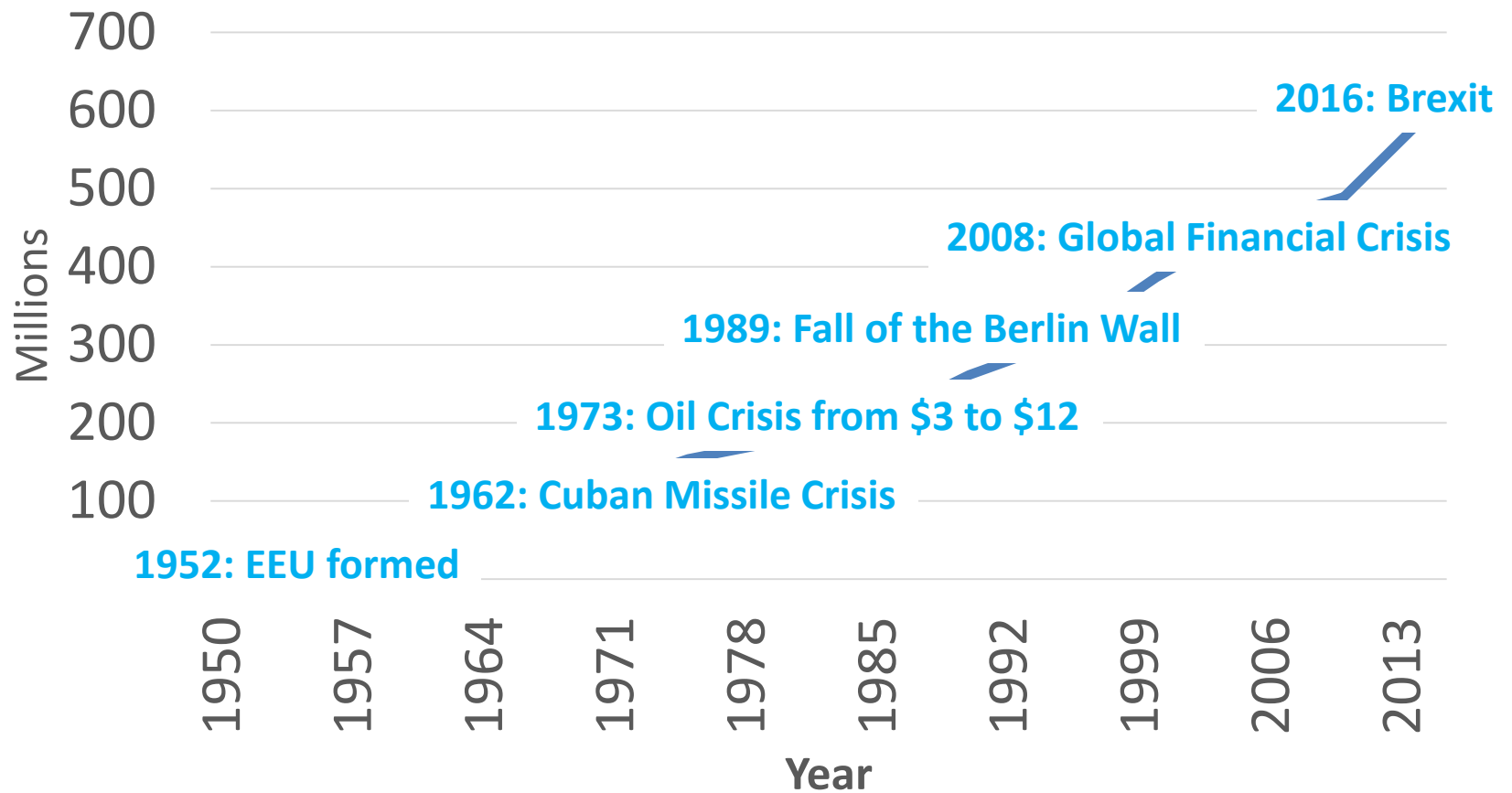
History of European Tourism



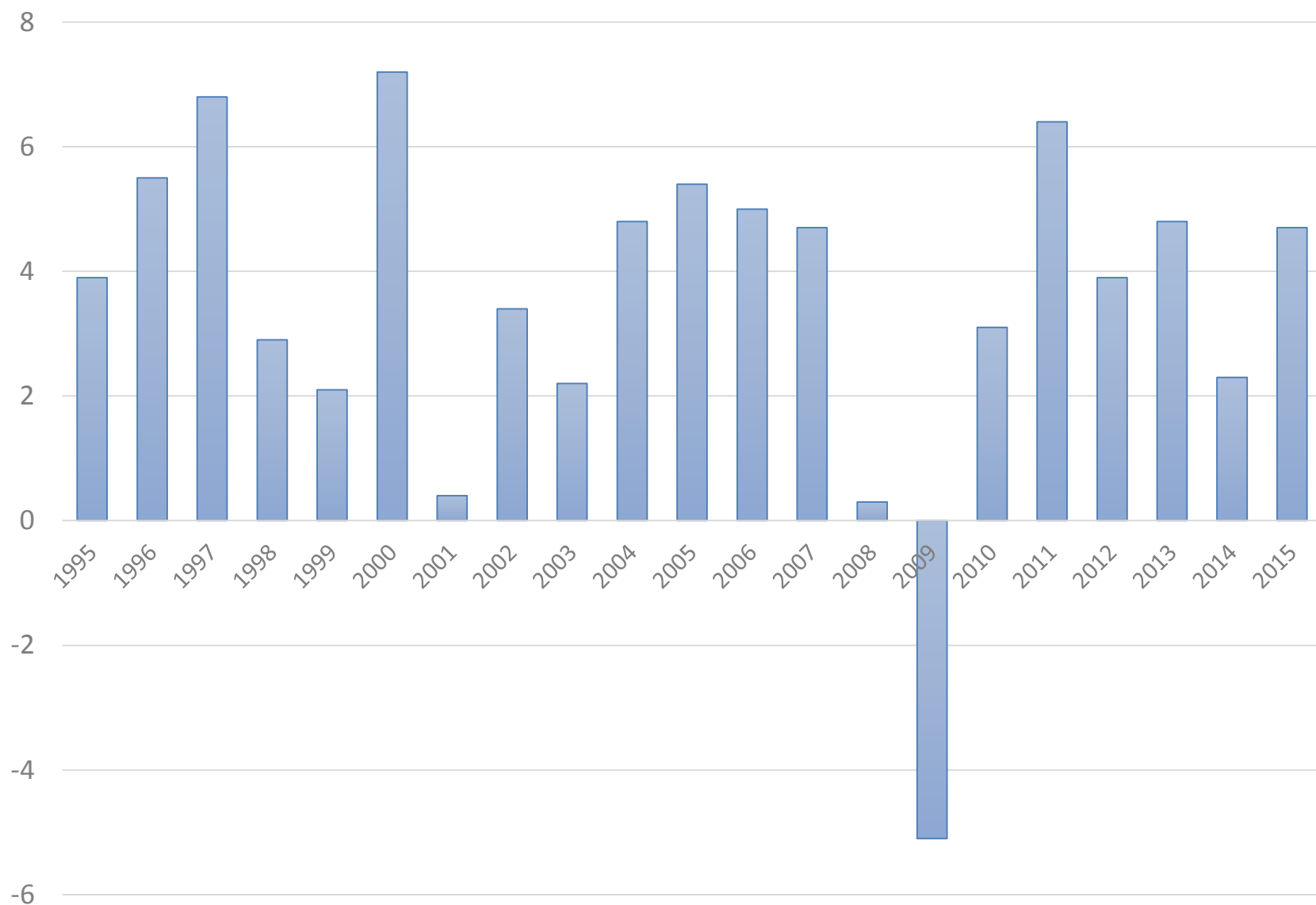
French Revolution and Grand Tours of Scotland

Durie (2012) / Yeoman (2008)

International Arrivals - Europe



International Arrivals: Percentage Change



Source: UNWTO

International Arrivals: Percentage Change



**Global
Financial
Crisis**

According to the UNWTO, growth of international tourism arrivals significantly outpaces growth of economic output as measured in Gross Domestic Product (GDP). With a European GDP at 1.6% pa, 1995-2015, international arrivals have grown 2.1 times faster than GDP. An average rate of 3.5% pa.



Source: UNWTO / IMF

1985



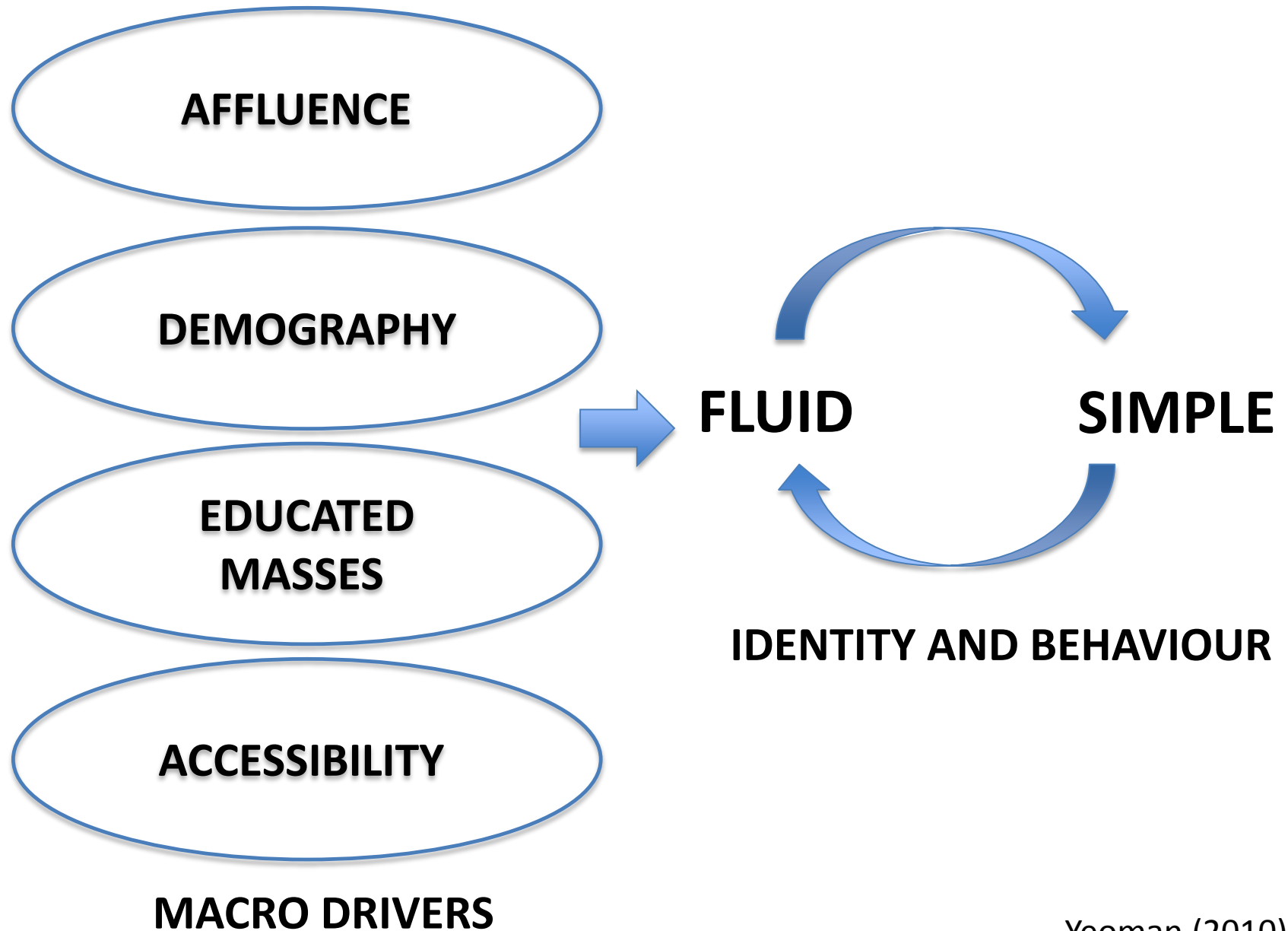
2005



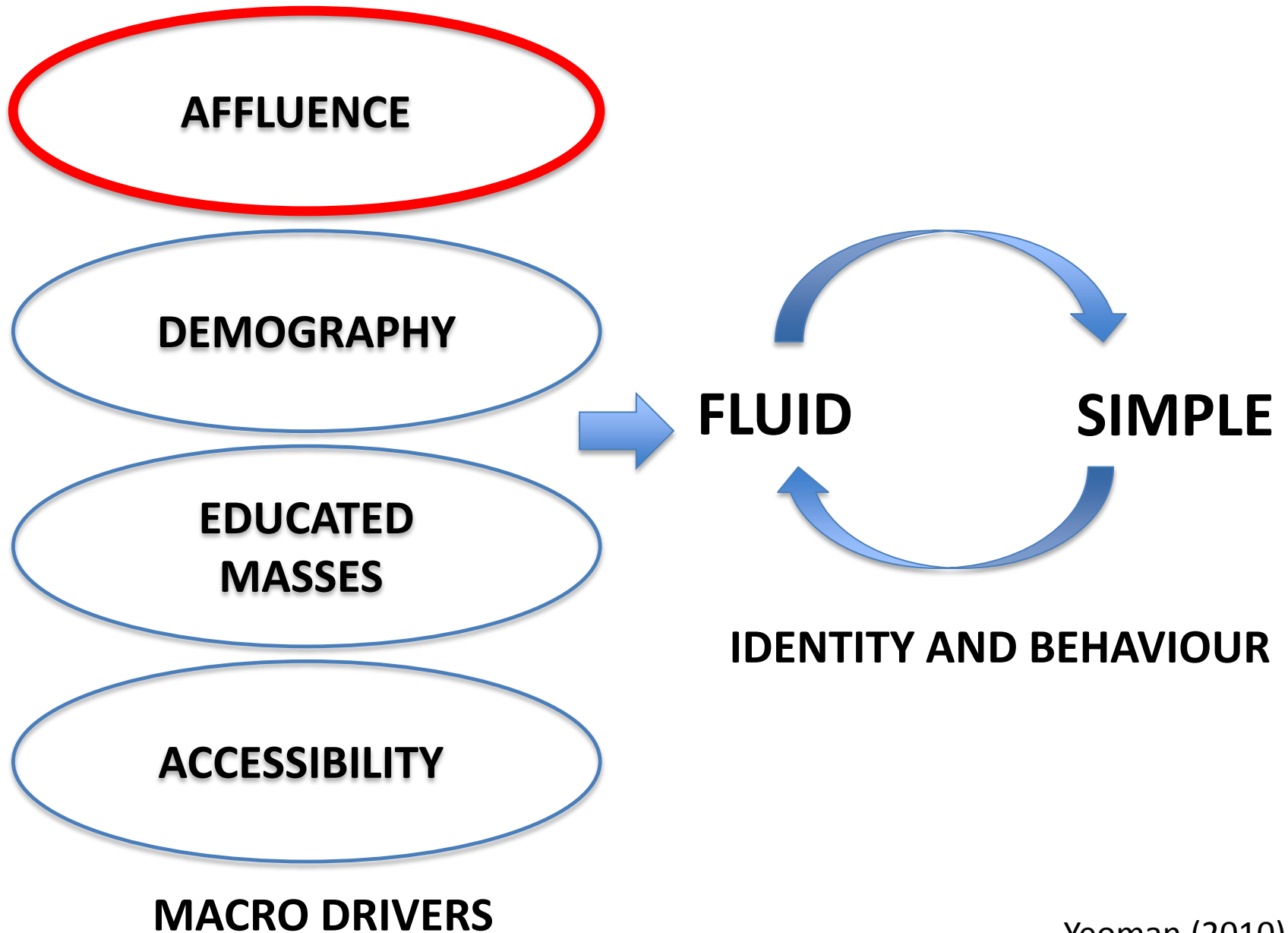
Yeoman et al (2009)

- **Identity** is the conception, qualities, beliefs, and expressions that make a person or group Identity may be distinguished from identification; identity is a label, whereas identification refers to the classifying act itself.
- **Consumer behaviour** refers to the processes consumers go through, and reactions they have towards products or services. Made up with a collection of trends.
- The **future** is what will happen in the time after the present

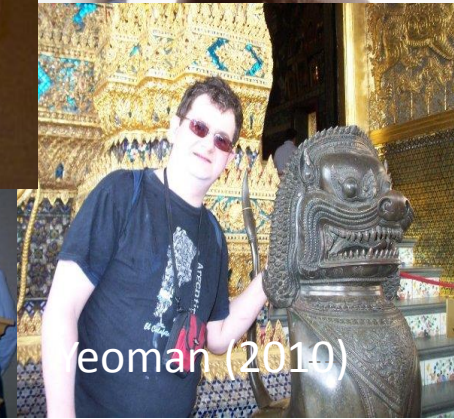
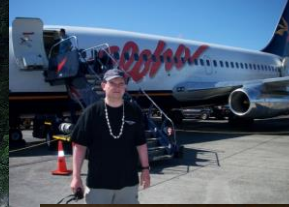
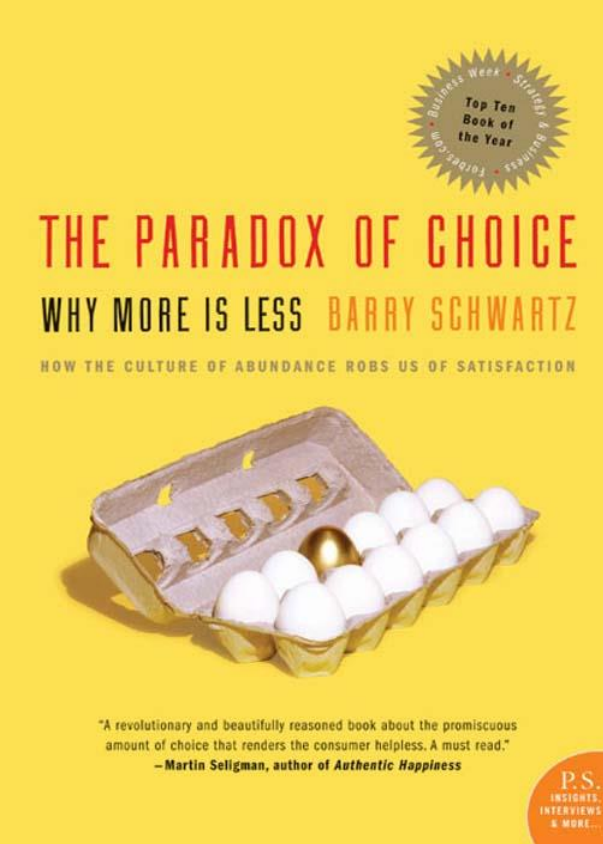
Modelling Future Tourist Behaviour = Trends



Modelling Future Tourist Behaviour = Trends



Fluid identity



Slowed Trends

Dominant Trends

SLOW

ACCERATED

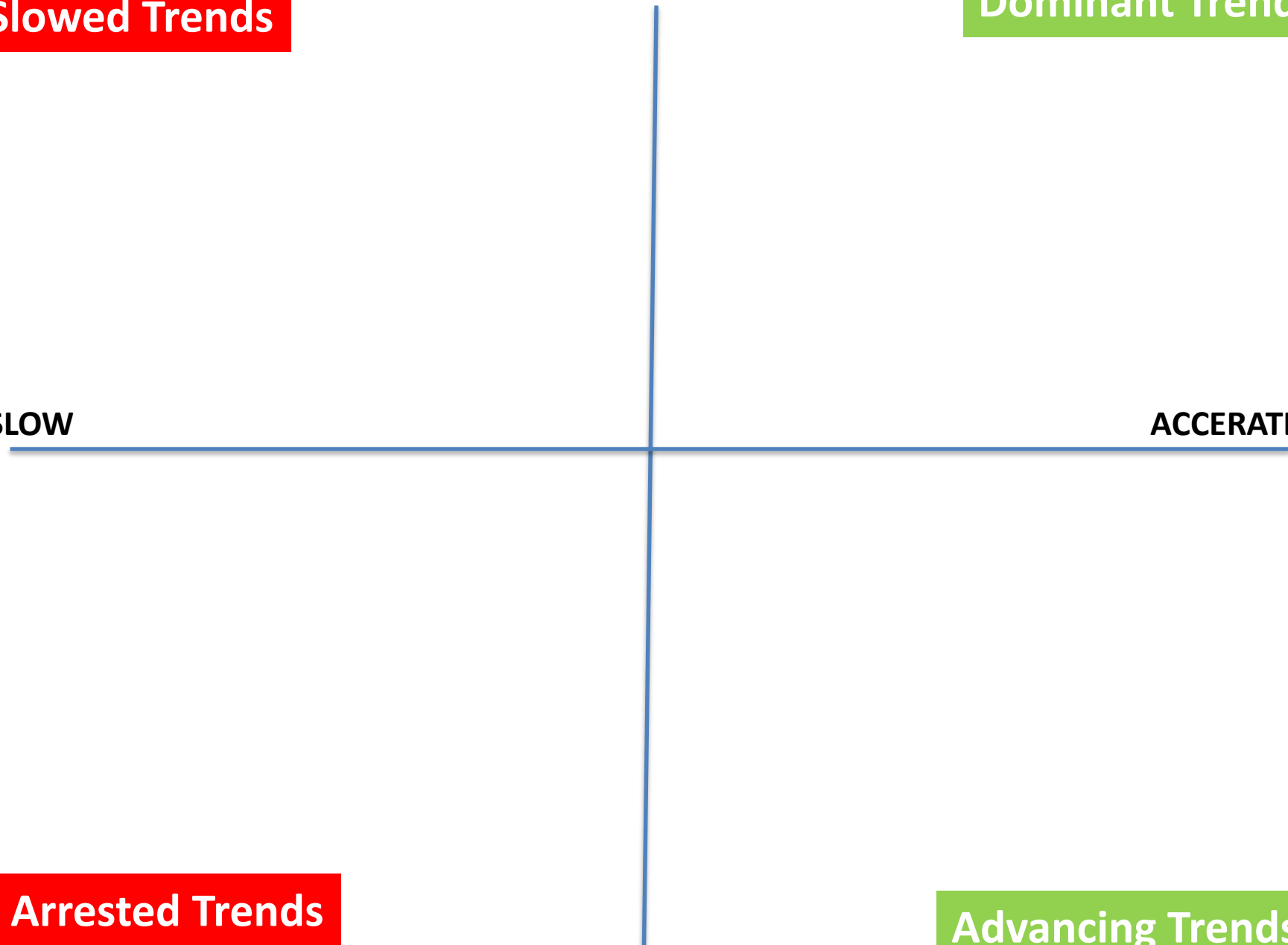
MATURE

NEW

Arrested Trends

Advancing Trends

Adapted from Flatters & Wilmot (2009)



Slowed Trends

Dominant Trends

FACE TO FACE

INCONSPICIOUS
CONSUMPTION

DESIRE FOR
NEW
EXPERIENCES

CULTURE OF
IMMEDIACY

MOBILE LIVING

FAMILIARITY

CONTESTED
LIBERALISM

FLUIDITY OF
LUXURY

SLOW

ACCELERATED

CONTESTED
SUSTAINABILITY

SMART
CHOICE

LEISURE
UPGRADE

AGELESS
SOCIETY

Arrested Trends

Advancing Trends

MATURE

NEW

Desire for new experiences



April 29, 2007



April 21, 2007



March 13, 2007



Nov. 28, 2005



June 21, 2005



June 2, 2005



Nov. 15, 2004



Nov. 17, 2003



July 1, 2003



June 21, 2002



July 1, 1998

*The UK consumer,
on average change
their hair style every
18 months*

Fluidity of Luxury

Materialism

Driving an expensive car
Enjoying the best home entertainment technology
Having beautiful home furnishings
Wearing designer clothes
Having nice toiletries and pampering myself



The 'old' version of luxury:
exclusive, expensive, best
quality, self-indulgent,
conspicuous, tangible, 'overt
materialism'

Enrichment

Eating good quality food
Going on expensive holidays
Living in a nice area



Emphasis on 'quality of life',
experiential, personal,
authentic, 'subtle/covert
materialism'

Time

Having time on my own
Having time just to relax



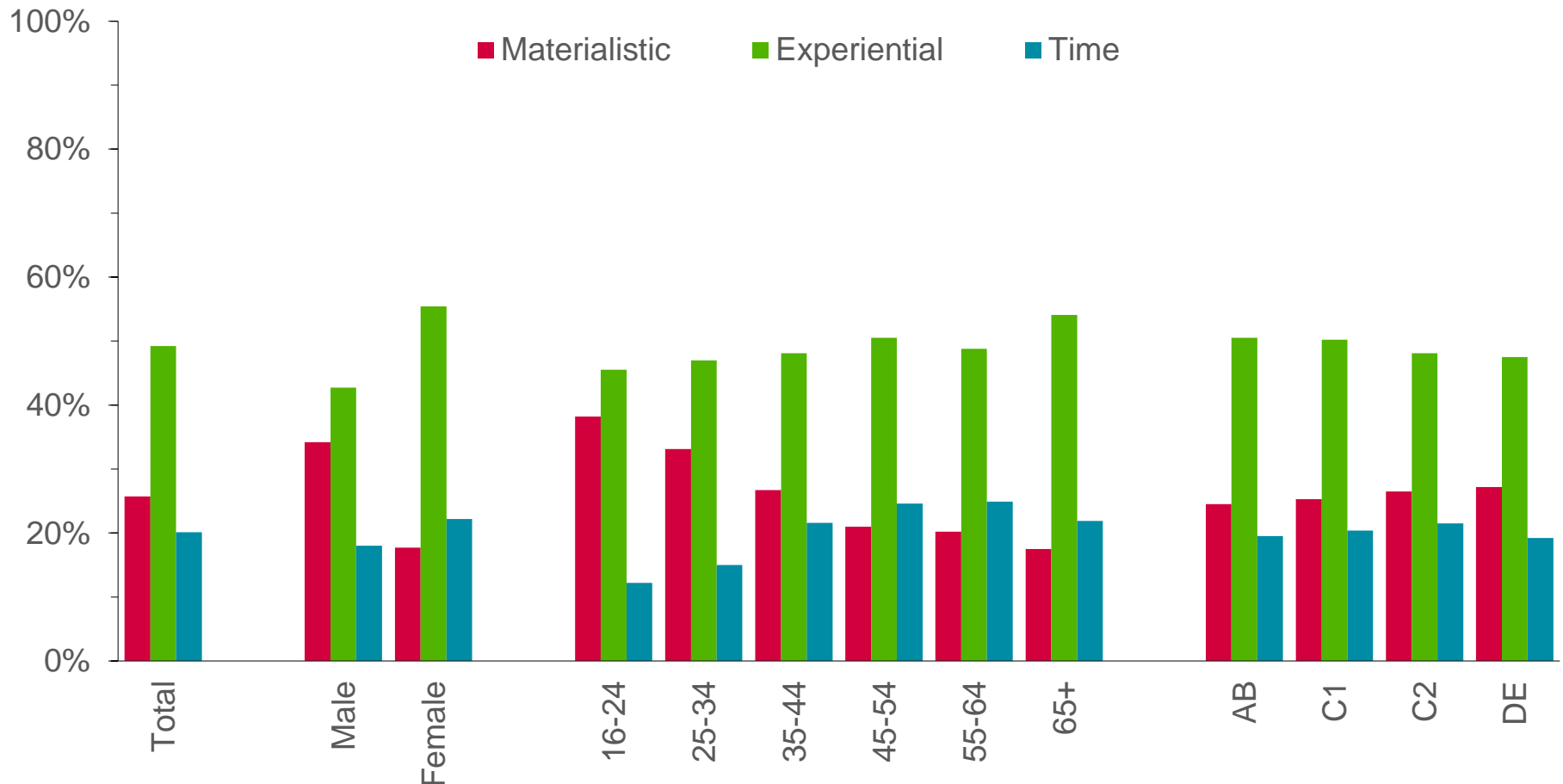
The value of relaxing and de-
stressing from the pace of
everyday life, focus on self-
development and quality of
life, intangible, non-material

Source: nVision

Dominant Trends

Differences in the meaning of luxury for different ages

“Please say which of the following things would be the best description of ‘luxury’ in your life.”
% who selected a materialistic, experiential or time option (see notes for definitions).

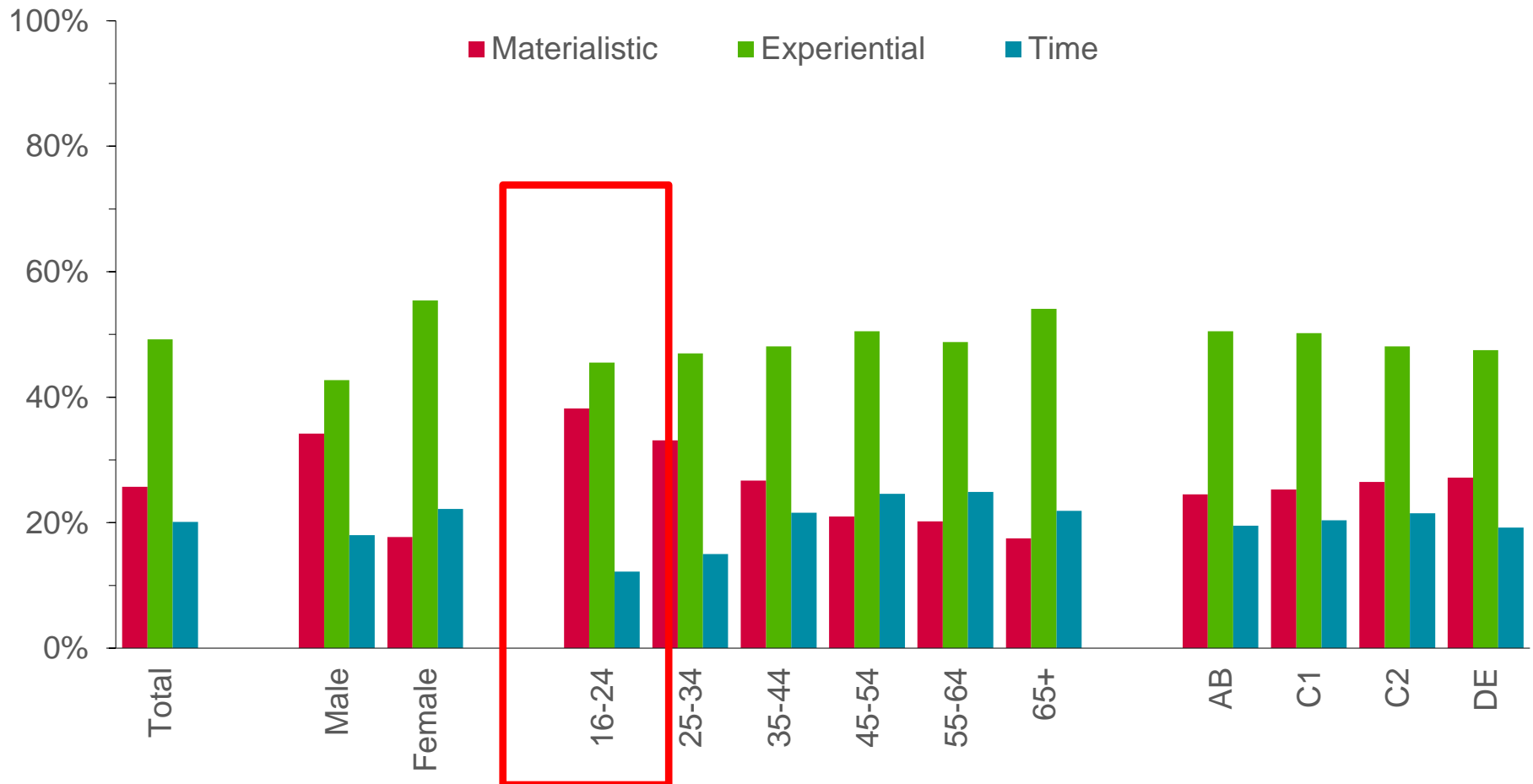


Dominant Trends

Source: nVision Research | Base: 5,000 online respondents aged 16+, GB, 2011

Differences in the meaning of luxury for different ages

“Please say which of the following things would be the best description of ‘luxury’ in your life.”
% who selected a materialistic, experiential or time option (see notes for definitions).

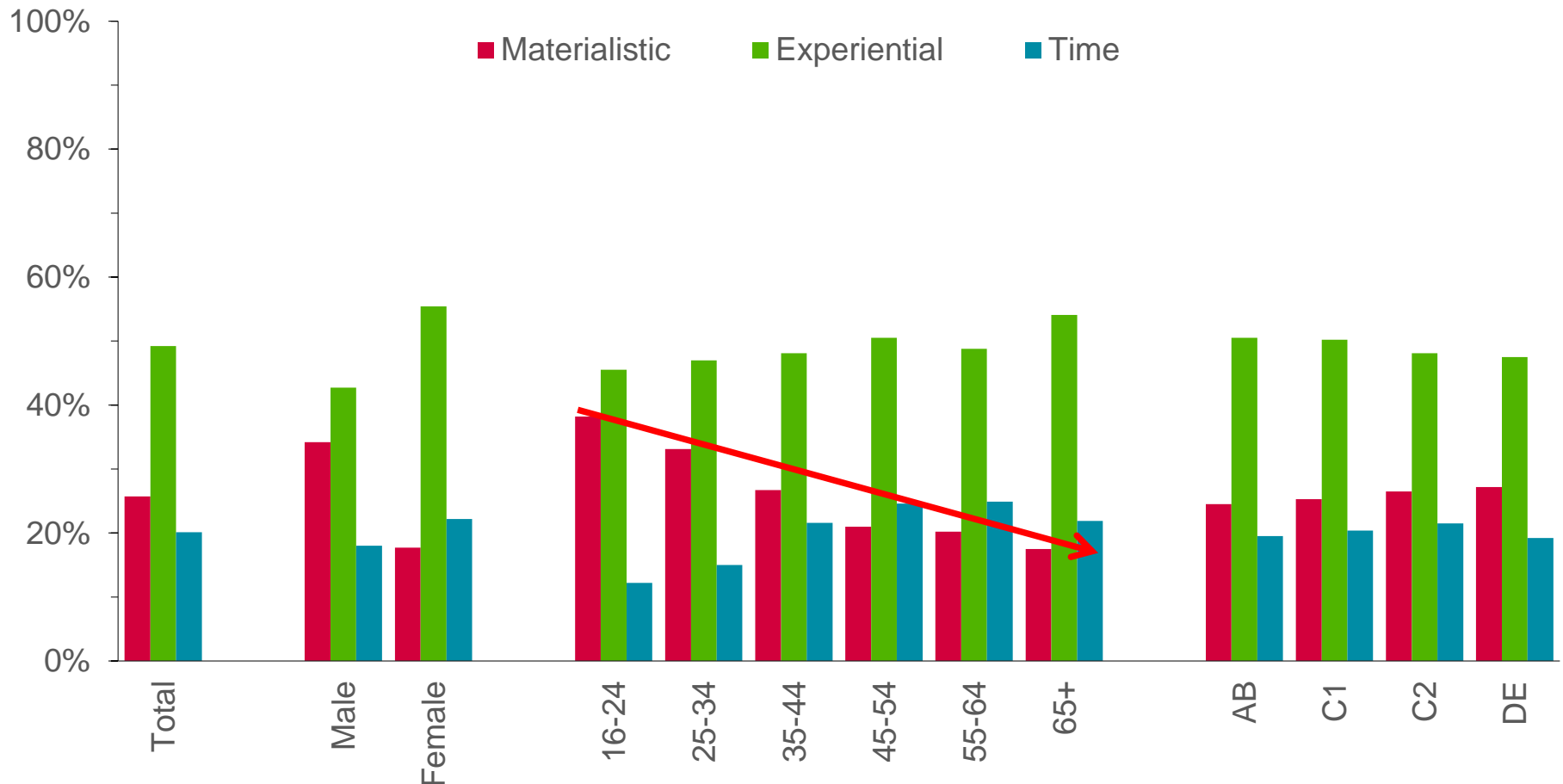


Dominant Trends

Source: nVision Research | Base: 5,000 online respondents aged 16+, GB, 2011

Differences in the meaning of luxury for different ages

“Please say which of the following things would be the best description of ‘luxury’ in your life.”
% who selected a materialistic, experiential or time option (see notes for definitions).



Dominant Trends

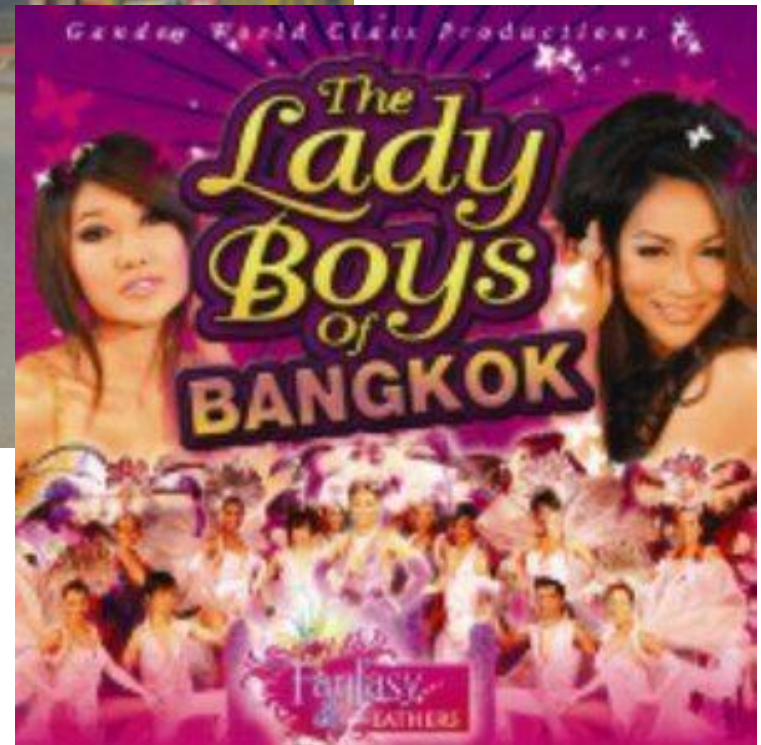
Source: nVision Research | Base: 5,000 online respondents aged 16+, GB, 2011

Mobile Living



Dominant Trends

Contested Liberalism



Dominant Trends

Yeoman (2010) / Yeoman *et al* (2015)

Culture of Immediacy

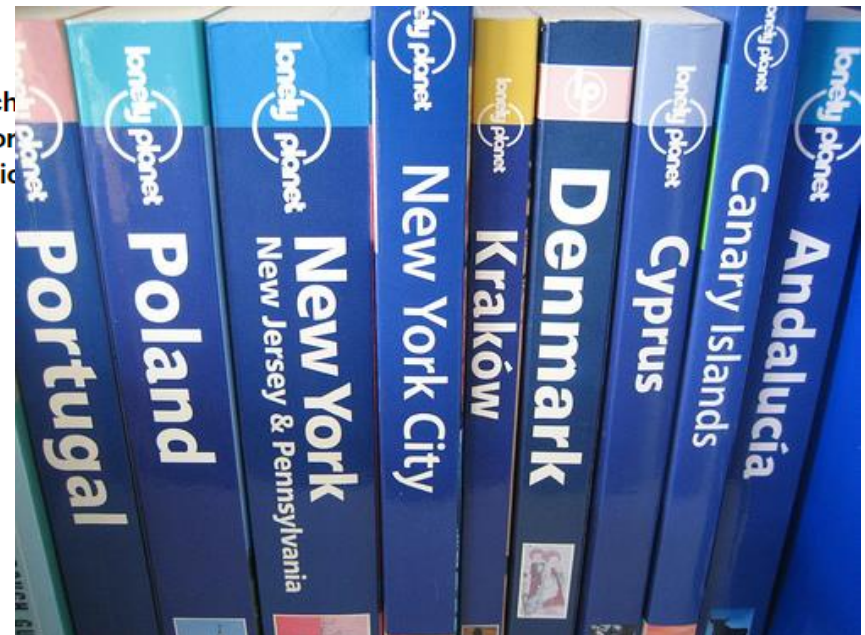


Smart Choice

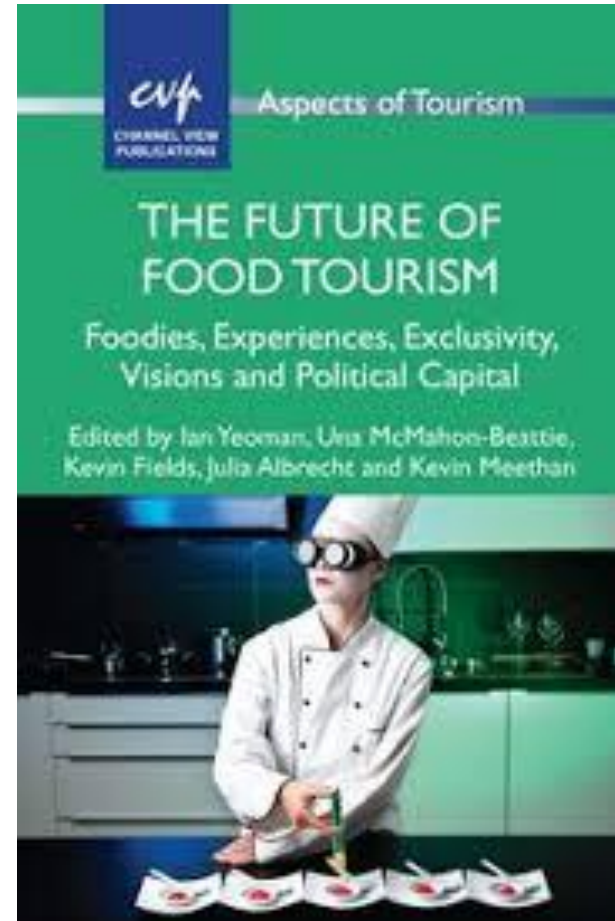
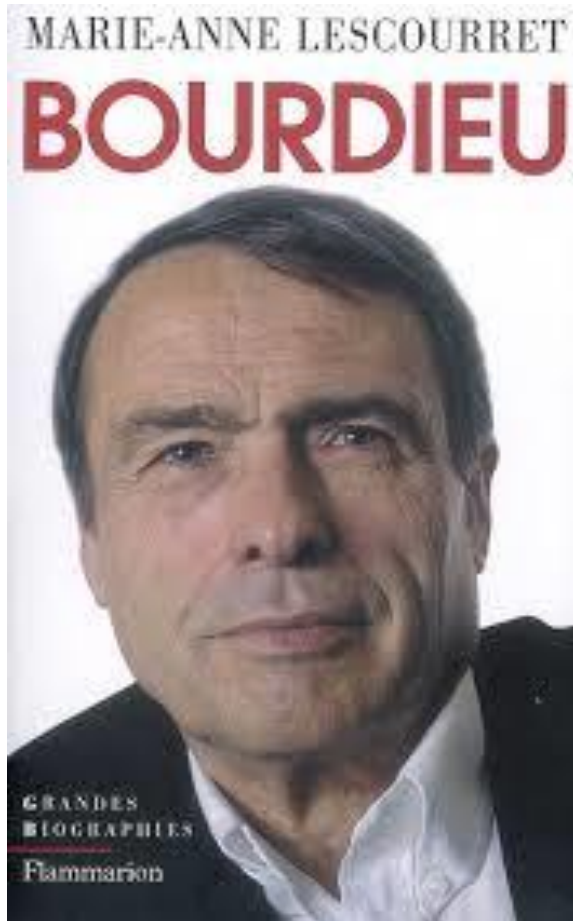


Tracking your computer, scouring your old bookings... and even checking the births, marriages and deaths! Travel firms spying on you to hike the price of your holiday

- Firms are collecting vast swathes of data to work out how much
- They find out where you like to sit on a plane and hike prices for
- Some even scan newspaper deaths, marriages and births sections in on your plans



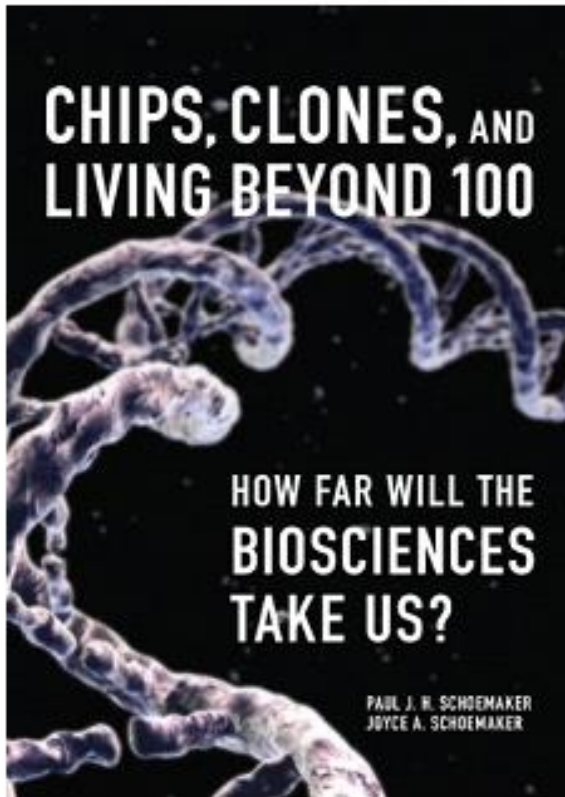
Leisure Upgrade



Yeoman *et al* (2015) / Future Foundation / Lescourret (2008)

Advancing Trends

Ageless Society



Yeoman *et al* (2010) / Future Foundation

Advancing Trends

Hiking in the Future



https://www.youtube.com/watch?v=kat8I5UM_Vs

Advancing Trends

Contested Sustainability



Retail therapy

Ecotourist

Advancing Trends



Yeoman (2012)

Inconspicuous Consumption

THE DAILY TELEGRAPH | SATURDAY, JANUARY 24, 2009

Oscars 2009 The nominations, the films, the stars, the hot tips telegraph.co.uk/oscars

NEWS REVIEW & COMMENT

Is modesty the new bling?

Chanel boss Karl Lagerfeld has advocated inconspicuous consumption as the look for the recession – and the stars are signing up in droves, says Celia Walden

Not since the days of bustles and smelling salts has modesty been considered a virtue. But last week Karl Lagerfeld breathed new life into a long outmoded word: "filling is over," he declared. "I call it 'the New Modesty'." Quite how seriously we can take this sentiment from a man who wears diamond knucklebusters, bathes in Evian and still keeps close the comfort cushion he had as a 10-year-old is up for discussion, but the notion is as timely as it is wide-reaching.

"This whole crisis is like a big spring housecleaning – both moral and physical," the German-born Chanel designer told *The New York Times*. "There is no creative evolution if you don't have dramatic moments like this. Red carpets covered with rhinestones are out." Cutting back his own spending may not be a part of Lagerfeld's strategy, but the implication for the rest of us is clear: where luxury was an attitude as much as a style of dress, we are to find a replacement in modesty.

Evidence of that shift in tone is everywhere. In politics, a new temperance reigns, as demonstrated by Obama's sober inauguration rhetoric. In the art world, the age of conceit, epitomised by Brit artists like Damien Hirst, the Chapman Brothers and Tracey Emin, is over; gratuitous vulgarity, even of the "satirical" kind, is winnily off-message. Broadcasting and its culture of linguistic bling – as propagated by Jonathan Ross and Russell Brand – has been affected, too, with radio and television bosses hurriedly exhorting "humility makers". Then there is the penitential financial sector, with all the New Modesty regulation that the Government is attempting to force upon it.

But it is in the world of fashion that this new ethos will be most clearly seen. At this month's Golden Globes the looks were pared down in the extreme, with actresses including Demi Moore, Penélope Cruz, Kate Winslet and Angelina Jolie opting for monochrome gowns in black, nude or



Black and white and modest all over: Cate Blanchett, Angelina Jolie and Rachel Weisz, right. Karl Lagerfeld, above

white, keeping make-up and jewellery to a minimum. Similarly, the male contingent – Tom Cruise, Jonathan Rhys Meyers and Brad Pitt – stuck to understated classics. Both in dress and demeanour, you could all but hear humorist Oliver Herford's words ringing in the stars' ears: "Modesty is the gentle art of enhancing your charm by pretending not to be aware of it." As I write, stylists are busy seeking conspicuously inconspicuous red carpet looks for next month's Academy Awards – already being dubbed the "Recession Oscars".

"Over the past two decades, fashion and society have descended to levels of vulgarity previously undreamed of," says fashion historian Brenda Polan, a professor at the London College of Fashion. "We have seen, wanton, exhibitionistic, clothes, flashy, over-decorated accessories and ugly shoes, straight out of a fetishist's most lurid fantasies. Now penitence, in the shape of



the New Modesty, moderation and, dare we say it, fiscal prudence, is a natural reaction. It's a bit like taking the veil after a life of self-indulgence in the hope that you can squeeze into Heaven after all."

Lofty ambitions are all very well, but how easy is it to put the New Modesty into practice? In adopting it, will we, like Mary Magdalene, be forced to wonder the recession desert in rags? Blessedly not, says *Telegraph* columnist and retail expert Mary Portas. "This is actually a great opportunity for us. It's rather nice not to be dictated to by fashion and retail any more. I picked up a Louis Vuitton scarf yesterday as I left the house, remembered

it was from last year's collection, and thought how blissful it was that it just didn't matter any more."

"We're veering towards a more considered 'discreet consumerism' that favours quality, value for money and even investment pieces over obvious status symbol one-season wonders," believes Harper's *Bazaar* editor Lucy Yuemans. "This will no doubt usher in the death of the 'It' bag, bling and the £500-plus designer T-shirt. But it doesn't mean we're all going to start dressing like nuns."

The New Modesty is as much about survival as aesthetics. Already, most of us will be forced to have more meetings with our bank managers, accountants and mortgage advisers than ever before. With unemployment figures at 1.92 million and many more teetering on the brink of redundancy, anonymity is preferable to ostentation.

"This year, no man will be wanting to walk around with a logo on his clothes the size of a football sponsor," explains GQ editor Dylan Jones. "The downturn will be good for the menswear industry because it will force designers to be more creative in a narrower band." And when even David Cameron breaks with anti-tradition and starts wearing a tie again, it's a sure sign that gimmickry and empty posturing are embarrassingly last season.

"During the great Thirties depression," says Polan, "there was such competition for jobs that people dressed to be taken seriously in the uniforms of lawyers, bankers, captains of industry. The same thing is starting to happen now." Says Polan, the award-winning founder of MyWardrobe.com, confirms that neutral lines and tailored staples are now selling better than ever. "Shoppers are opting for more classic, understated, timeless pieces like black

trousers and fitted white shirts, instead of frivolous one-wear purchases."

As a result of this restraint, says Portas, we are likely to see a return to a greater appreciation of the clothes we have and an end of the throwaway culture – the use of cobbles, for example, and even darning. "New Modesty is about a slow wardrobe as opposed to fast fashion," she insists.

Zoe Benyon, creative director at jeweller Robinson Pelham, a favourite of Dame Judi Dench, can attest to this. "We've seen a 65-70 per cent rise in people having stones reset or pieces remodelled," she tells me. "And people are going for less of a 'bling' polish on the golds and silvers. Diamonds are still just as popular, but a greater number of people are opting for brown diamonds, which are far less in-your-face."

"Lagerfeld is not saying we should stop consuming," surmises celebrity stylist Hannah Blayds, "just that we should adjust our attitudes. It is about inconspicuous consumption now: wear couture if you can afford it, but don't brag about it."

So who are the New Modesty icons? Barack Obama's clean-cut suits and ascetic demeanour have made him an instant role model for men, just as Carla Bruni-Sarkozy's demure Christian Dior suits (based on the era of the late Forties and Fifties) and flat footwear have done for women. But while Obama's fashion sense stems from the same place as his meritocratic beliefs, Carla's assumed style is a self-imposed corset, a way of emphasising the recent assertion that her "man-eating days are over". "Ironic women such as Jane Birkin, the late

Carolyn Bessette-Kennedy and Cate Blanchett, who have always caught our attention with their understated glamour and discreet style, are the ones the fashion world are now clamouring to replicate," says Calgary Avinsino, executive fashion director of Vogue.

In Britain, New Modesty propagators include Sarah Brown, the Duchess of Cornwall, Thandie Newton and Rachel Weisz, their US counterparts being Anne Hathaway, Kirsten Dunst and Angelina Jolie. Beware of the "faux-modests": Gwyneth Paltrow, Chris Martin and Kate Winslet. Guy Ritchie, too, falls into the "faux-modest" category – it is not enough to sit in the corner of a pub wearing a flat cap, especially when you own the pub. These fraudsters are enough to make those who will remain defiantly opposed to Lagerfeld's concept – Victoria Beckham, Madonna and, of course, Lagerfeld himself – laughable in comparison.

It would surely be taking our theme too far to suggest that, as was made clear in its original, biblical context, modesty should be about looking beyond the clothes at the person inside. If last year's bonfire of the vanities has taught us anything at all, it is that we should look at the person inside, not the clothes.

But it doesn't mean we're all going to start dressing like nuns...

Carolyn Bessette-Kennedy and Cate Blanchett, who have always caught our attention with their understated glamour and discreet style, are the ones the fashion world are now clamouring to replicate," says Calgary Avinsino, executive fashion director of Vogue.

In Britain, New Modesty propagators include Sarah Brown, the Duchess of Cornwall, Thandie Newton and Rachel Weisz, their US counterparts being Anne Hathaway, Kirsten Dunst and Angelina Jolie. Beware of the "faux-modests": Gwyneth Paltrow, Chris Martin and Kate Winslet. Guy Ritchie, too, falls into the "faux-modest" category – it is not enough to sit in the corner of a pub wearing a flat cap, especially when you own the pub. These fraudsters are enough to make those who will remain defiantly opposed to Lagerfeld's concept – Victoria Beckham, Madonna and, of course, Lagerfeld himself – laughable in comparison.

It would surely be taking our theme too far to suggest that, as was made clear in its original, biblical context, modesty should be about looking beyond the clothes at the person inside. If last year's bonfire of the vanities has taught us anything at all, it is that we should look at the person inside, not the clothes.

But it doesn't mean we're all going to start dressing like nuns...

Carolyn Bessette-Kennedy and Cate Blanchett, who have always caught our attention with their understated glamour and discreet style, are the ones the fashion world are now clamouring to replicate," says Calgary Avinsino, executive fashion director of Vogue.

In Britain, New Modesty propagators include Sarah Brown, the Duchess of Cornwall, Thandie Newton and Rachel Weisz, their US counterparts being Anne Hathaway, Kirsten Dunst and Angelina Jolie. Beware of the "faux-modests": Gwyneth Paltrow, Chris Martin and Kate Winslet. Guy Ritchie, too, falls into the "faux-modest" category – it is not enough to sit in the corner of a pub wearing a flat cap, especially when you own the pub. These fraudsters are enough to make those who will remain defiantly opposed to Lagerfeld's concept – Victoria Beckham, Madonna and, of course, Lagerfeld himself – laughable in comparison.

It would surely be taking our theme too far to suggest that, as was made clear in its original, biblical context, modesty should be about looking beyond the clothes at the person inside. If last year's bonfire of the vanities has taught us anything at all, it is that we should look at the person inside, not the clothes.

Yeoman (2012)

Slowed Trends

Face to Face



Information Centre of the Future



Slowed Trends

Familiarity



Slowed Trends



Yeoman (2012)

Simple Identity



What trends do you see?



<https://www.youtube.com/watch?v=e9aSdufl8rc>

Slowed Trends

MATURE

Dominant Trends

**GREEN
CONSUMERISM IS
CONTESTED**

**FOCUS
ON THE
BOARDROOM**

AUTHENTICITY

MATERIALISM

**CONNECTING
WITH ROOTS
AND FAMILY**

**SIMPLICITY:
IN SEARCH
OF SLOW**

SLOW

ACCELERATED

**EXTREME
EXPERIENCE
SEEKING**

**DECLINE OF
DEFERENCE**

**END OF
ADVENTURE**

STAYCATION

**MERCURICAL
CONSUMPTION**

Arrested Trends

Advancing Trends

NEW

Simplicity: In praise of slow



lonely planet

World's best
slow travel

Carl Honoré

Slow

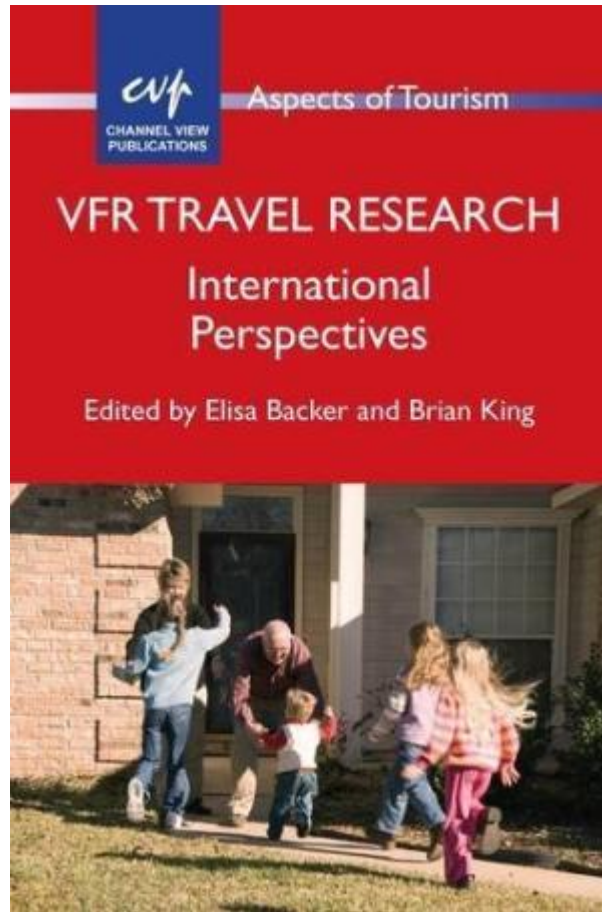
Elä hitaammin!

Dominant Trends

Yeoman(2010)



Connecting with Family Roots



Dominant Trends

Authenticity

AUTHENTICITY

BRANDS, FAKES, SPIN AND THE LUST FOR REAL LIFE



Dominant Trends

Yeoman (2012)



Focus on the Boardroom



POLITICS

GSA Scandal: So What Does \$823,000 Buy You in Las Vegas?

Amid new allegations of lavish spending, Newsfeed breaks down the damage done to taxpayer at the General Services Administration's infamous Las Vegas blowout.

Dominant Trends

ney Subramanian @cmsub | April 18, 2012

Flatter & Wilmot (2009)

Mercurial Consumption

Find the fare you're looking
for while you're not looking.

FIND OUT MORE



Price Radar

Yeoman (2015) / Future Foundation

Advancing Trends

End of Adventure

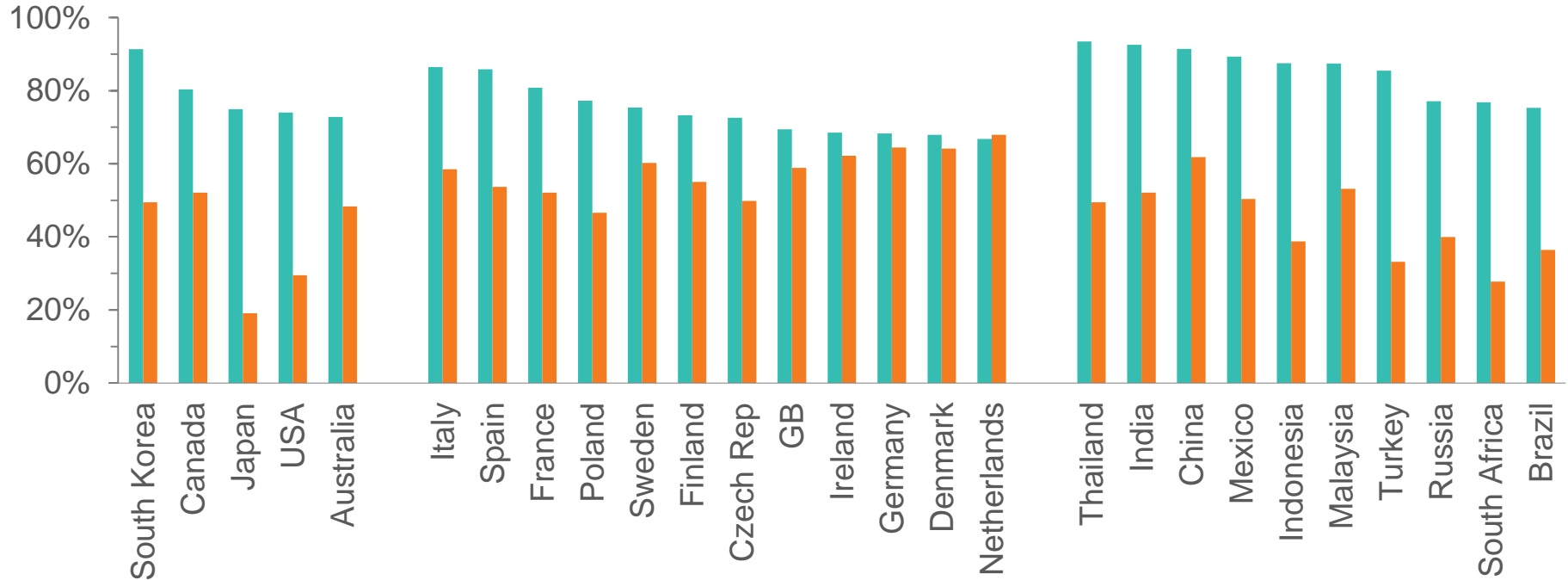


Staycation

Taking holidays at home and abroad

“Which of these best describes how often you do each of the following activities?” | % taking a holiday at home or abroad at least once in the past year | 2016

■ Have a holiday in own country ■ Have a holiday abroad



Advancing Trends

ographic data

Green Consumerism is Contested



Materialism



Slowed Trends

Yeoman *et al* (2015)

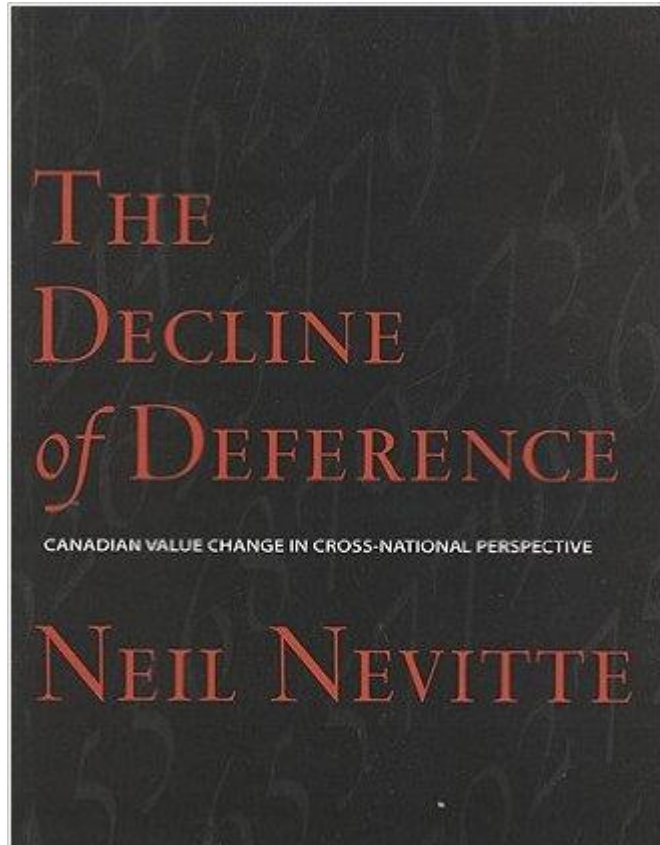
Extreme Experience Seeking



Arrested Trends

Flatters & Wilmot (2009)

Decline of Deference



A highly educated generation of **Baby Boomers** (those born 1946-1964), in better health and with more disposable income than previous older generations, will exit the workforce en masse during the 10s decade (although for many, working beyond formal retirement will be a reality). The group now represents a

demanding, still aspirational, technologically aware and financially potent market-segment in the most developed economies of the world.

Arrested Trends

APAC consumers are the most demanding in the world

Published on: August 26, 2015 Author: David Chew

Flatters & Wilmot (2009)

Portugal: The Beauty of Simplicity



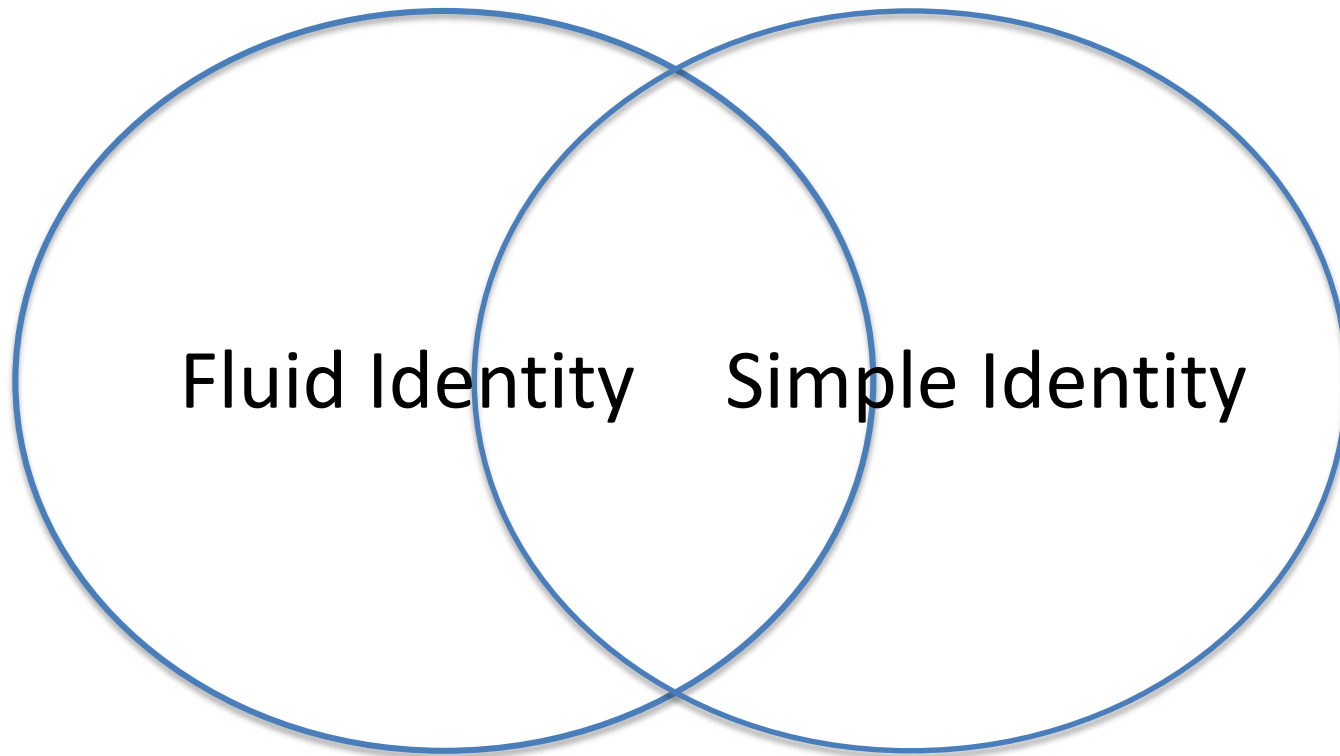
<https://www.youtube.com/watch?v=bHX9UyU8mGg>



Fluid Identity

Simple Identity

Liminality: Blurring of Identity



References:

- Backer, E & King, B (2015) VFR Travel Research: International Perspective. Channelview, Bristol
- Durie, A (2012) Travels in Scotland, 1788-1881: A Selection from Contemporary Tourist Journals. Boydell Press, Edinburgh.
- Flatters, P & Wilmot, M (2009) Understanding the Post Recession Consumer. July. Harvard Business Review. Accessed at <https://hbr.org/2009/07/understanding-the-postrecession-consumer>
- Lescourret, M (2008) Pierre Bourdieu: Vers une Economie du Bonheur. Flammarion, Paris.
- Yeoman, I. *et al* (2009) The Future of Scotland's international Tourism Markets. *Futures*, Vol 41, pp387-395.
- Yeoman, I (2012) 2050: Tomorrows Tourism, Channelview, Bristol.
- Yeoman, I (2008) Tomorrows Tourist. Elsevier, Amsterdam
- Yeoman, I *et al* (2010) Demography and Tourism. Goodfellows, Oxford.
- Yeoman, I *et al* (2015) The Future of Food Tourism, Channelview, Bristol
- Yeoman, I (2010) Tomorrows Tourist: Fluid or Simple identity. *Journal of Globalisation Studies*. Vol, No 2, pp118-127. Accessed http://www.socionauki.ru/journal/files/jogs/2010_2/tomorrows_tourist_fluid_and_simple_identities.pdf

Data:

- Special thankyou to the Future Foundation for access to data and trends. www.futurefoundation.net
- UNWTO Library - <http://www.e-unwto.org/>
- World Bank - <http://data.worldbank.org/region/european-union>