The Future Travel Journey: toolkit for evaluating English tourism products against future consumer trends

Prepared by Foresight Factory for VisitEngland
PART 1: A CHANGING LANDSCAPE

What are the structural changes that will define the travel journey in the next 5-10 years and how will they impact your tourism offering?
A Changing Landscape: Economy

Global rebalancing, but advanced markets still crucial

Proportion of Global GDP

- United States
- China
- Eurozone

Ratio of GDP per capita (at purchasing power parity) of each country vs. USA

2015-2020: advanced economies are expected to account for 45% of global growth - compared with 28% from 2009-2015
Tourism is a strongly cyclical sector

Growth in inbound overnight visits by destination region, 2010-16
A Changing Landscape: Precarious Living

% saying that the following is one of the two most important issues | EU28 average

- Unemployment
- Immigration
- Economic situation
- Health and social security
- Terrorism
- Rising prices/inflation

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<thead>
<tr>
<th>Issue</th>
<th>Spring 2016</th>
<th>Spring 2014</th>
<th>Spring 2012</th>
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<td>Unemployment</td>
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<td>Rising prices/inflation</td>
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A Changing Landscape: Demographics

Ageless Travellers

Ratio of population aged 65+ per 100 population aged 15-64

Solo Travellers

% of solo households per country

Finland: 41%
France: 37%
Japan: 32%
USA: 27%
UK: 26%
## A Changing Landscape: Economy

<table>
<thead>
<tr>
<th>Does this structural driver hold opportunities for your tourism products? Which ones? What can you do to take advantage of them?</th>
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</table>
A Changing Landscape: Globalisation

Does this structural driver hold opportunities for your tourism products? Which ones? What can you do to take advantage of them?

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A Changing Landscape: Precarious Living

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A Changing Landscape: Demographics

Does this structural driver hold opportunities for your tourism products? Which ones? What can you do to take advantage of them?

Does this structural driver pose any challenges for your tourism product? What can you do to protect yourself from them / react to them?
PART 2: CONSUMER TRENDS TRANSFORMING THE TRAVEL JOURNEY

Which consumer trends will define the touch points of the travel journey in the next 5-10 years and how can they be used in the development of your tourism product?
Trends transforming the customer journey

1. Inspiration & Pre-Planning
2. Booking Process
3. Connected Travel
4. Evolving Travel Needs
Trend Report Background

• The project’s output trend report structures a number of trends around 4 touch points of the travel journey: inspiration & pre-planning, booking process, connected travel and evolving travel needs – with 3 consumer trends used to explore the future of each of these touch points in detail.

• The following section of this toolkit includes the slides that were used during the report debrief presentation, so you can easily repurpose them for your own presentations. For each trend, of course, more information can be found in the actual report.

• Working through the following consumer trends will allow you to evaluate where your tourism product currently sits with regards to future consumer behaviour. Various worksheets and exercises are provided to help you future proof your tourism products and create a concrete action plan for using consumer trends in their development.
1. Inspiration & Pre-Planning

- Filter Bubble
- Maximising Behaviour
- The Death of Risk
Despite the endless resource offered by the internet, future travellers will live in a filter bubble created by personalisation algorithms and homogenous social networks. Tourism products will have to work hard to stay on the traveller’s radar.
"Obviously I get less of a wide range of different things, which is a good thing – I trust my friends and influencers more than I trust Lonely Planet. You trust your friends, simply because their only agenda is for you to have a good time. I certainly end up experiencing a lot of similar stuff, but then again I know what I like and that’s what I want to do and enjoy when I go on holiday.”

FEMALE, 27, SWEDEN
Bursting the Filter Bubble

**VisitDenmark** draws attention to attractions by using the on-trend #hygge hashtag

**Helsinki Secret Residence** invites influencer on a experiential trip to the Finnish capital
Future-proof your tourism offering: Filter Bubble

Future Momentum: 8

On a scale of 1 to 10, how Filter Bubble proof is your tourism product and why?

Is your tourism product visible enough in the changing inspiration landscape? How can consumers currently find your product? Which other channels do you believe you should be using?

Do you believe travellers would see your tourism product as an experience they would like to share via word of mouth or online? How could you encourage them to do this more?
Future-proof your tourism offering: Filter Bubble

Do you have a clear view of which group(s) you are trying to reach with your product?

Is your target group easily able find out about your product if they are using algorithms to personalise their searches?

Are you working with social influencers? If not, which social influencers would be a good match for your product? How could you collaborate?
Maximising Behaviour

Value, for future travellers, will be about more than price. They will opt for trips that allow them to collect as many unique experiences as possible on their journey, without having to invest considerable time and money in getting about.
"Price is very important. My connections and I often unintentionally add, whenever talking about a trip you’re going to make, whether something has been a cheap deal or expensive".

FEMALE, 24, NETHERLANDS

“While I appreciate having an affordable trip, I won’t compromise on service because we’ve already compromised enough when we were younger”.

MALE, 64, GERMANY
Providing value to the Maximising consumer

The Wild Atlantic Way is Ireland’s first long-distance touring route, aimed at achieving a level of market impact that individual destinations would not be able to

GO City Card is a US attraction pass service which lets users buy an all-inclusive pass or build their own
Future-proof your tourism offering: Maximising Behaviour

Future Momentum: 8

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<th>Question</th>
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<tr>
<td><strong>Is your tourism product accessible at different price points? Do you allow travellers to tailor the experience of your product to their personal preferences? If not, how can you do this going forward?</strong></td>
<td><strong>What differentiates your tourism product from others / what is your USP that makes your product worth visiting?</strong></td>
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</table>
Future-proof your tourism offering: Maximising Behaviour

**Do you have any view on how your target group(s) defines value?**

**Is it expensive for travellers to physically reach your tourism product? How can this be improved / made more cost-efficient (e.g. multi-city transport tickets, multi-attraction tourist cards)?**

**Would your product seem more appealing to travellers if they are aware of other tourism destinations in the same area? Are there any collaborations with nearby tourist attractions that would make sense?**
The Death of Risk

With limited budget and holiday time available, future travellers want to find out as much as possible about their destination before getting there. They expect travel providers to empower them by providing enough upfront information about tourism products.
“It’s getting easier and easier to see what places look like, to hear about other people’s experiences prior to your travel. I think that’s why places that used to be fairly non-ubiquitous are becoming more and more popular tourism destinations”.

NICK LARSON, HEAD OF PLATFORM AT TIMELOOPER

“When I plan a trip abroad, I find out as much as I can about the destination before I go” | % who agree or agree strongly

Trend: The Death of Risk
Helping tourists avoid FOMO

The Margaret River Region has curated a number of tours and itineraries to make sure guests don’t miss out on local gastronomy spots.

“A lot of people will do a fair bit of research to make sure they don’t waste any time. I didn’t that once and spent the entire weekend feeling as though I was missing out on something, but couldn’t quite put my finger on what. Since then I’ve done fairly thorough research for every trip I’ve gone on”.

FEMALE, 27, SWEDEN
Future-proof your tourism offering: The Death of Risk

Future Momentum: 8

On a scale of 1 to 10, how does your tourism product minimise perceived risk and why?

Is it clear for travellers what your tourism product has to offer before they get there? What more can you do to clearly communicate this and excite people? How can you help guide travellers in getting the most out of your tourism product and avoid missing key experiences?
Future-proof your tourism offering: The Death of Risk

Do you have a clear view of which group(s) might feel at risk in terms of your product?

Can you list any risks that travellers coming to your tourism product are likely to worry about?
2. The Booking Process

- Wishlisting
- Conversational Commerce
- Impulsive Existence
Wishlisting

Future travellers will expect to be able to more easily take the step from inspiration to purchase, by shopping directly from wishlists and a range of new interfaces such as smart TVs.
“Swedes definitely wishlist, but I think it’s quite a big step to see an ad on Instagram from a travel agent and then just click ‘book now’. Booking a trip, at least when you go with other people, often needs a bit of coordination with regards to time off work etc, which means seeing an ad in your feed and then instantly clicking to book, might be quite far off. However, if it is a custom ad (which it probably is), that might be enough to push customers over the edge and book”.

FEMALE, 27, SWEDEN
From aspiration to purchase

**Starwood Hotels** have enabled booking through its Instagram feed on posts created by influencers invited to the Paris hotels.

**The Coastal Pass** is a holiday planning tool that lets users create their own itineraries by pinning things to do on video footage.
Future-proof your tourism offering: Wishlisting

**Future Momentum: 4**

On a scale of 1 to 10, is your product wishlistable and how?

How can consumers book your tourism product at the moment? Are you offering them any ways to quickly make the step from inspiration to purchase? How could this process be made more seamless?

Does your tourism product have a presence on wishlisting / visual social media platforms (e.g. Pinterest, Instagram), either via its own profiles or through social influencer feeds? If so, can consumers directly make a booking via any of these platforms?
Conversational Commerce

Making enquires about or booking tourism products will be easier than ever for future travellers, as they won’t even have to leave their own messaging apps to do so. There will be less need for tourism products to develop their own expensive apps or websites.
“Yes, I think [Conversational Commerce] is very useful for travellers. We want to waste as little time as possible to anything other than our holiday, and a direct message is easier (you don’t have to convince yourself to pick up the phone and call someone) and less time consuming (you wait for a reply and while you do so, you can do something else, instead of being put on hold).”

FEMALE, 24, NETHERLANDS
A new way of conversing with travellers

“We communicate with our travel agent via WhatsApp and send everyone the info of the trip also via WhatsApp. I won’t sign into any website but would go through this conversational process with a trusted partner, then later on go to the agency just to swipe the credit card”.

MALE, 64, GERMANY

Interrail is using Facebook Messenger and WhatsApp to communicate with travellers planning or currently on an Interrailing trip.
Future-proof your tourism offering: Conversational Commerce

Future Momentum: 7

How can travellers currently find out more / enquire about your product? Do they have to go to a bespoke website / app or do they have easier ways of contacting you with questions / make a booking? Rate this experience out of 10.

What are the most used messaging apps in the countries of your target audiences? Are you using these apps at all in the customer service / booking process at the moment?

Are there any other ways in which the customer service / booking process could be made more accessible and casual for the traveller? Which ones?
Fuelled by the fear of missing out, a desire to travel like a local – not a tourist – and a growing comfort with mobile purchases, future travellers will more often prefer to book tourism products once they are at their destination. Products that do not accommodate this behaviour might increasingly be overlooked.
“I find it easy to book things while already on holiday, but it depends strongly on the destination. I didn’t get to enjoy my visit to Guangzhou in China properly last year mainly because I could not use Google, Foursquare there is empty, and information in English about things to do, eat or visit was scarce aside from very old blog posts on WeChat”.

MALE, 28, GERMANY
Pre-booking vs. spontaneous booking

“I think that maybe planning is now more at a Meta level, but not at the micro level as that that might get more delayed with people who are confident in having access to local information when they’re at the place. People want reassurance about tariffs and internet access and that type of thing”.

JO REID, MD AT CALVIUM

Bath’s Roman baths encourage tourists to still pre-book, but in exchange offers them access to lesser known exhibitions.
Future-proof your tourism offering: Impulsive Existence

Future Momentum: 6

On a scale of 1 to 10, is it easy for travellers to (find out how to) make bookings for your tourism product once they are at the destination? What is helping them do this?

What are the barriers to in destination bookings and how can these be removed?
Future-proof your tourism offering: Impulsive Existence

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<th>Question</th>
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<tr>
<td>Do you believe it is better for travellers to make bookings for your tourism product in advance? Why? How can you incentivise them to do so?</td>
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<td>Do you believe pre-booking for your tourism product will become less important in the future and how can you help speed up that process?</td>
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<td>Can your tourism tap into the growing sharing economy to make last-minute decision-making easier for consumers (e.g. allowing travellers to easily and safely exchange or re-sell tickets for tourism attractions)?</td>
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3. Connected Travel

- Locational Living
- Performative Perfection
- Mastering the Mind
In a future with better connectivity, location-based technology will help raise awareness of and increase engagement with tourism products by pushing content based on an individual traveller’s whereabouts.
“Technology is having a significant impact on tourist information centres. The footfall to these places is falling dramatically because the tourists can get the information for themselves. Why should I go stand in a queue and pick up a leaflet to get information when I can do it all online, I can do it all myself?”

IAN YEOMAN, TOURISM FUTURIST
Location-based information and promotions

**Geo-Tourist** is an audio tour site and app that uses GPS data to play informative audio clips around touristic routes and advertise nearby offers and services to users.

“I can’t think of anyone who wouldn’t want to be given a promotion like free drinks at the bar when they are nearby. I think it’s helpful as well if apps or companies let you know what activities and landmarks are around you during your stay so that you don’t miss out on anything”.

MALE, 34, USA
Future-proof your tourism offering: Locational Living

Future Momentum: 8

On a scale of 1 to 10, is your tourism product currently benefiting from location-based technology at all? If not, how do you believe it could benefit from it going forward?

How can location-based technology help enhance engagement with your tourism product?
Does your target group(s) use locational technology and if so, what is their most used service?

How can you situate your product within the wider locale? Are there other tourism products or amenities that would be useful or of interest for your target group(s)?
Future travellers are social media conscious and will have a strong preference for tourism products that are 1) contributing to their social capital/worth sharing; and 2) easily shareable.
“Check-ins are quite common, especially in airports or train stations, though people also check in at restaurants, nightlife location, local landmarks and more. Checking in and sharing this on Facebook is seen as a status symbol and people usually only check in at glamorous, non-trivial places and when doing something special.”

FEMALE, 27, FRANCE
Enabling performative behaviour

W Hotels in the US and GB has launched a set of branded geofilters on Snapchat for their guests. The filters turn the guest’s snaps into a postcard to share with followers.

Organisations such as Aperture Tours, as well as locals in various destinations are organising photo walks.
Future-proof your tourism offering: Performative Perfection

**Future Momentum: 7**

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<tr>
<td>On a scale of 1 to 10, how does your tourism product contribute to the traveller’s social capital? Please list why, an if not, what actions should be taken to make it more aspirational?</td>
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<tr>
<td>Are you encouraging travellers to take pictures, record videos, check in… at or write reviews of your tourism product? How could this be improved?</td>
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Highly aware of the pressures of modern life and the harmful impact this has on their personal wellbeing, relaxation will be a key motivation for future travellers. However, a real digital detox will still be a step too far for most!
“Wanting to take a break from social media while on holidays isn’t a very widespread behaviour, although the media talk about the idea of digital detox a lot. I definitely feel like this is very niche behaviour for now. Younger people especially have integrated the fact that technology is part of their lives and wouldn’t want to give up their smartphone or laptop while on holidays”.

FEMALE, 27, FRANCE
El Camino is a Latin American travel service which offers trips with a personal group photographer to take the worry away from documenting the trip.

“...The only social media program I use is Facebook and I use that to upload pictures. I’ll do it when I’m at home or having a nice dinner and especially on vacation. I love uploading pictures for all my friends to see! I don’t feel the need to not be connected digitally. I want to know how my kids are during my vacation when I’m away and I like to stay connected to them and friends and know what they are up to”.

FEMALE, 64, USA
Future-proof your tourism offering: Mastering the Mind

Future Momentum: 6

On a scale of 1 to 10, does your tourism product allow travellers to relax? What makes your tourism product better at providing quiet and relaxation than others?

How does your tourism product allow travellers to stay connected without ruining the relaxation qualities of the product?

Does your tourism product offer any activities for more hardcore mindfulness tourists? Is this an area you want to explore or not?
4. Evolving Travel Needs

- Pursuit of Real
- The Leisure Upgrade
- Customised Reality
Genuine, authentic tourism products are preferred by future travellers as they seek to get rid of their “tourist” stamp and experience their destination like a local instead.
“People don’t want to think of themselves as tourists nowadays, they want to think of themselves as travelers. They have an increasing desire to have tea where local Londoners go, or visit Indian restaurants where the Indian ex-pats eat”.

NICK LARSON, HEAD OF PLATFORM AT TIMELOOPER
Finding a balance between tourist & traveller

“I believe people always mix and match both touristy and authentic local things depending on how much time they have at a destination. If I go to Paris I love finding a good local restaurant loved by the locals but still go and take a selfie at the Eiffel tower”.

MALE, 28, GERMANY

Each year, the Japanese Ministry of Agriculture, Forestry and Fisheries hands out the Savor Japan award to leaders in regional delicacies to encourage visits to different regions of the country.
Different definitions of authenticity globally

Visitors to Ystad can sign up for an “In the footsteps of Wallander tour” and various conceptual guide tours where you can try to solve some Wallander murder mysteries.

“What I realised [when travelling to Sydney] was that for a certain group in Sydney, the nostalgia of England, the ‘Downton Abbey’ type approach is really, really interesting. How does that then encourage travellers to travel to where it’s based? That’s what I think really is going to start differentiating and driving the ability for the English tourism region, but they need to understand what value they add in terms of differentiation and what I call the experience that customers are wanting, aligning it to that”.

ROBERT SINCLAIR-BARNES, STRATEGIC MARKETING DIRECTOR AT AMADEUS IT GROUP
Future-proof your tourism offering: Pursuit of Real

Future Momentum: 7

On a scale of 1 to 10, how authentic is your product and which elements of your tourism product are most authentic (e.g. food, nature, opportunity to meet the locals...)?

How can you proof the authenticity of your tourism product to travellers (e.g. certificates / labels indicating restaurants using local ingredients)?

How is authentic Englishness perceived by travellers from your key markets? Which features of your tourism products can be played out in this context?
The Leisure Upgrade

Skill-seeking future travellers will prefer tourism products that combine fun and an opportunity for learning or self-improvement.
“Entertainment should be about learning new things as much as simply having fun” | % who agree strongly or agree

Trend: The Leisure Upgrade

FF Online Research | Base: 1000-5000 online respondents per country aged 16-64 (Indonesia & S. Africa 16-54), 2016 February
Focusing on cultural heritage

The Canal to Coast food tour between Gothenburg’s archipelago and the Göta Canal gives travellers plenty of opportunity to visit local artisan food producers on the way.

“Don’t put everything into a glass box and expect people to come, because they will just be bored. If you look at the average consumer today, they are more demanding, more sophisticated, more culturally aware, have travelled further. There is built heritage, natural heritage and cultural heritage. Cultural heritage is all about people and food and wine and that one has become more important than the others. Culture is no longer dead, the cultural is alive and that experience economy is driving everything”.

IAN YEOMAN, TOURISM FUTURIST
Future-proof your tourism offering: The Leisure Upgrade

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<th>Future Momentum: 7</th>
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<tbody>
<tr>
<td><strong>On a scale of 1 to 10, does your product offer opportunities for learning and self-improvement? What does it offer and are there any more untapped opportunities in this respect?</strong></td>
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</table>

| How do you present learning experiences as part of your tourism products (e.g. museum vs. local markets)? Does it invite travellers to participate? |
Future-proof your tourism offering: The Leisure Upgrade

Do you have a clear view of learning experiences that your target group(s) is interested in participating in?

Are there cultural heritage (e.g. local cuisine, specific traditions, popular music acts…) your tourism product can tap into better than it is doing now? How is your product relevant to its region?
Customised Reality

New technologies (e.g. AR, VR, hearables) can be used to bring to life and personalise experiences for more demanding future travellers.
“So now kids are excited about going to Tower of London and watching medieval knights battle, or watching the ships traverse the Thames from unload goods from ports hundreds of miles away in the 13th century. Using VR to that end makes the site more compelling and is a way for parents to get their children excited about history and culture and helps the sites compete against Shrek’s Adventure Land”.

NICK LARSON, HEAD OF PLATFORM AT TIMELOOPER
Using AR and VR to bring heritage to life

The England’s Heritage Cities app allows visitors to explore attractions in 12 cities and unlock a collection of engaging stories using AR.

By bringing VR to the actual historical locations, Timelooper aims to create a level of immersion and empathy that could not be achieved through VR experiences for domestic use.
Future-proof your tourism offering: Customised Reality

**Future Momentum: 4**

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<tr>
<td>On a scale of 1 to 10, are there elements of your tourism products which are harder for travellers to engage with and which require quite a lot of pre-research / imagination?</td>
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<tr>
<td>Which new technologies do you believe could enhance your tourism product most in terms of really bringing these aspects to life? VR? AR? Hearables?</td>
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<tr>
<td>Do you believe your tourism product could benefit from any of these technologies in a practical way (e.g. for real-time translation) rather than from an engagement point of view?</td>
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</table>
FUTURE-PROOFING SUMMARY

A series of exercise sheets to help summarise future-proofing findings and develop action points based on the covered trends.
Future-proofing summary: Exercise 1

The following exercise consolidates the 3 scores given to each trend.

<table>
<thead>
<tr>
<th>Trend Momentum</th>
<th>The prevalence that this trend will have for consumers in the next 5-10 years. Trends that will be commonplace behaviour are scored highly compared to more niche or targeted actions.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own Product Score</td>
<td>The score that you have given your product in relation to each trend as you have worked through each trend’s futureproofing questions. This score is based on what your product already offers on a scale of 1 to 10 (10 meaning that your tourism product already performs optimally against this specific consumer trend.</td>
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</table>

**Exercise 1:** Use the final column to evaluate the opportunities this trend holds for the development of your tourism product, if better aligned with the described behaviour.
<table>
<thead>
<tr>
<th>Trend</th>
<th>Momentum</th>
<th>Own Product Score</th>
<th>Opportunity to develop tourism product</th>
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<tr>
<td>Filter Bubble</td>
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<td>Maximising Behaviour</td>
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<td>The Death of Risk</td>
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<td>Wishlisting</td>
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<td>Conversational Commerce</td>
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<td>Impulsive Existence</td>
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<td>Trend</td>
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<td>Locational Living</td>
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<td>Performative Perfection</td>
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<td>Mastering the Mind</td>
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<td>Customised Reality</td>
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Future-proofing summary: Exercise 2

**Exercise 2:** Please choose the 3 trends where you see the most opportunity for your organisation and write down concrete action points in the table below.

<table>
<thead>
<tr>
<th>Top 3 Trends</th>
<th>Action points</th>
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For more info, please contact

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