

TOP TRENDS



NOW & NEXT 2022-2023 | TRAVEL

As society continues to face macro-economic and social challenges, industries are being shaped by people's shifts in mindset and behavior. This deck outlines five of the top general and travel trends that impacted the past year and are likely to influence 2023 and beyond, with each trend including a predicted staying power starting now and continuing through the near to long term.

As destination marketing and travel organizations acknowledge the importance of supporting sustainable initiatives that improve the wellbeing of society, a greater spotlight has been placed on residents and healthy regenerative travel behaviors. The travel industry is also being called to embody cultural shifts and act toward increased inclusivity and accessibility, technologically enabled flexibility and support for a broadened sense of wellness.

Top General Trends

1. Craving Optimism
2. Evolving American Dream
3. Online Identity Crisis
4. Responsibility Embraced
5. Intentional Livelihoods & Living

Top Travel Trends

1. Resident Spotlight
2. Beyond Sustainable to Regenerative Destinations
3. Accessible & Inclusive Offerings
4. Tech-Enabled Flexibility
5. Well-Rounded Wellness Escapes

TOP GENERAL TRENDS



CRAVING OPTIMISM

STAYING POWER: NOW - NEAR TERM

As Americans face ongoing disruptions a craving of optimism has been perpetuated in culture. Brands present happy, lighthearted and optimistic visions as aspirations, and consumers express a desire to find the bright side of life – seeking happy moments of escape.

88%

88% of Americans want new experiences that make them laugh or smile.

- KANTAR U.S. MONITOR

Optimism has gained cultural cachet as every-day and luxury brands from Bubly to Hermès highlight lightheartedness, smiles, and optimism as the most enviable goods.

- THE DRUM AND HERMÈS

78%

78% of Americans will pay a premium for true happiness.

- KANTAR U.S. MONITOR

80%

80% of Americans agree “Every day it feels like there’s something new to worry about in the world.”

- KANTAR U.S. MONITOR

13%↑ 9%↑

Americans’ media consumption shows a craving for excitement and happy endings with a **13%** rise in viewership for Action and **9%** rise for Romance/romcoms.

- GWI

The #1 quality that has become more important in personal lives since inflation went up is “maintaining a positive attitude.”

- KANTAR U.S. MONITOR



EVOLVING AMERICAN DREAM STAYING POWER: NOW - MEDIUM TERM

In the face of a changing economic and cultural environment, Americans are redefining collective aspirations by seeking value over exclusivity and celebrating realism over superficial status. From preferring second-hand clothing that is better for the environment over logo-spattered fashion, to desiring durability over exclusivity, the narrative for American aspirations is shifting to a more pragmatic vision.

Value was ranked as a #1 trend heading into 2023, replacing sustainability as the top trend of 2022 according to a recent market research report.

- INNOVA RESEARCH IN FOOD BUSINESS NEWS

76% 60%

76% of Americans have switched to less expensive clothing brands and **60%** have bought something secondhand.

- KANTAR U.S. MONITOR

#ThriftFlip has garnered over 2.8 billion views on TikTok.

- GWI

Consumers now favor durability (**84%**), differentiation (**71%**), and customization (**66%**) over factors like exclusivity (**50%**) or elevating their social status (**32%**).

- KANTAR U.S. MONITOR

Since mid-2021, there has been an **8%** drop in the number of consumers who want brands to be “exclusive,” which means that some high-end brands won’t be able to rely on their logo as much as they used to.

- GWI

Many car owners see their vehicles as less of a way to express their personality (**-9%**) and status (**-14%**) while value for money gains prominence with a desire for cheap and easy to maintain vehicles up **7%** since Q2 2021.

- GWI

75% vs 11%

75% of consumers say beauty is more about what you feel on the inside vs. **11%** who say it is more about how you look on the outside.

- KANTAR U.S. MONITOR

55% vs 45%

More Gen Zs prefer to see people “living realistic, balanced lives” (**55%**) vs. people “achieving all their hopes and dreams” (**45%**).

- KANTAR U.S. MONITOR

ONLINE IDENTITY CRISIS

STAYING POWER: NOW - MEDIUM TERM

The fusion of online and in-person identities continues with the prevalence of digital platform usage. From proto-metaverses to VR and social media, there is no shortage of ways for people to express themselves, or an avatar version of themselves, online. However, as these mediums evolve, tensions between the opportunities and the negative impacts remain as outputs of our increasingly digitized culture. Brands will need to use discernment in employing a balance of offline and digital tactics available that align best with their business.

Three-quarters of Americans have used Facebook in the last six months, with **(71%)** using YouTube and **(51%)** using Instagram. For Gen Z, YouTube is king **(83%)**, followed by Instagram **(74%)** and TikTok **(64%)**.

- THE HARRIS POLL

38% ↑

In the past year, 15 million views were tracked across platforms mentioning AR or VR, up **38%** from the previous year, suggesting that social audiences are getting more engaged in the topic.

- TUBULAR DATA IN DIGIDAY

62% of millennials and **60%** of Gen Zers think “how you present yourself online is more important than how you present yourself in person.”

- THE HARRIS POLL

55%

Globally, **55%** of consumers agree that they have trouble sifting fact from fiction in the digital world.

- DENTSU

76%

76% of Americans are interested in avatars and in customizing the physical appearance of their character.

- GWI

Online to in-person: Nearly a third of Gen Z users look forward to in-person experiences—like creator conventions and meet and greets—with their favorite online influencers.

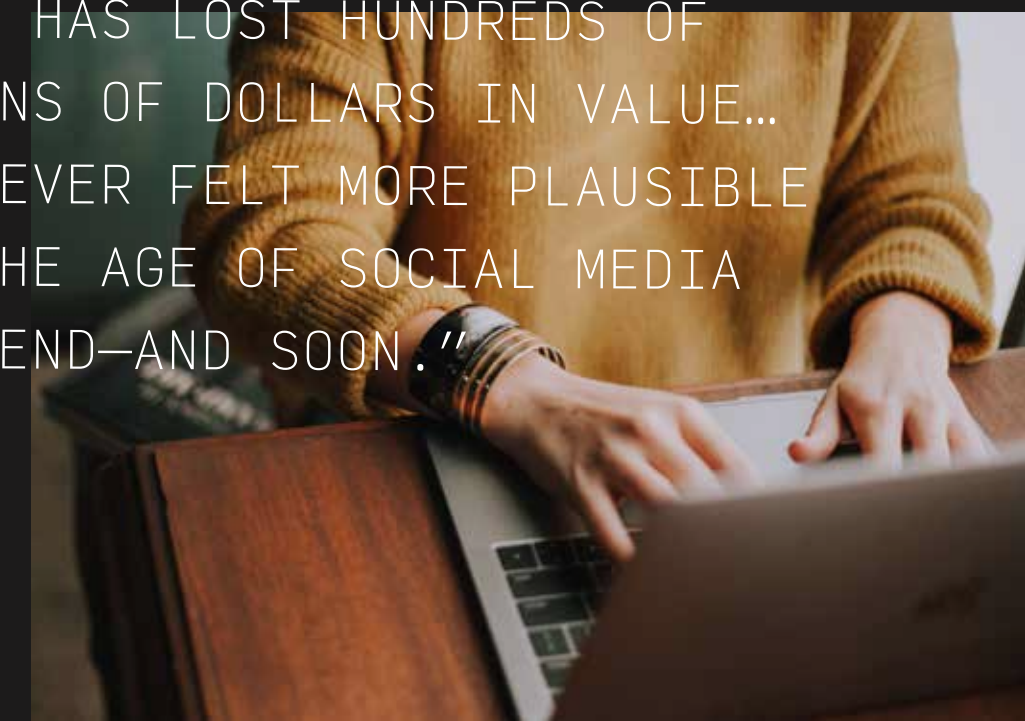
- INSTAGRAM WITH WGSN

(87%) of Americans want increased control of personal data, decentralized social media platforms **(77%)**, and an open web free from walled gardens **(77%)** in the next iteration of the internet.

- THE HARRIS POLL

“FACEBOOK IS IN DECLINE, TWITTER IN CHAOS. MARK ZUCKERBERG’S EMPIRE HAS LOST HUNDREDS OF BILLIONS OF DOLLARS IN VALUE... IT’S NEVER FELT MORE PLAUSIBLE THAT THE AGE OF SOCIAL MEDIA MIGHT END—AND SOON.”

- THE ATLANTIC



RESPONSIBILITY EMBRACED **STAYING POWER: NOW - LONG TERM**

Faced with numerous societal challenges, Americans are embracing a sense of responsibility to take action. They are seeking positive improvements for a more inclusive, equitable, and sustainable world and are working together with brands to create a greater collective impact.

“As consumers reassess the impact of existing social inequities and their consumption on the world, they are experiencing a rising need to hold themselves and others accountable for positive change.”

- KANTAR U.S. MONITOR

62%

62% of US consumers care about the impact of social justice issues.

- GWI

47%

47% say poor treatment of staff would discourage them from buying from a brand.

- GWI

Advance Auto Parts’ People with Disabilities hiring initiative has grown to include 17 distribution centers and stores in 14 metro markets across the US, as well as remote and in-person positions in their corporate offices.

- KANTAR U.S. MONITOR

As climate concerns rise, DIY clothing offers a sustainable alternative to fast-fashion with more than half of Gen Z respondents saying they plan to DIY their clothes in 2023.

- INSTAGRAM WITH WGSN

In response to Russia’s attack on Ukraine, Yale School of Management Professor Jeffrey Sonnenfeld and his research team created a tracker that identified businesses that had changed their dealings with Russia to create a sense of accountability.

- KANTAR U.S. MONITOR



INTENTIONAL LIVELIHOODS & LIVING STAYING POWER: NOW - MEDIUM / LONG TERM

In response to ongoing volatility, people are focusing on what they can control and being more intentional about how they are structuring their lives. Americans are evaluating the fundamentals from their work to their schedules, homes and what organizations they engage with, seeking meaningful career options and conscious living choices that align with their values.

34%

34% of Americans say that being present for family and friends is their most important goal in life, an increase of **7%** YoY.

- GWI

64%

64% of Americans say work-life balance is most important to them in the workplace, the second highest factor behind only salary/compensation.

- GWI

'Work On Climate' is a Slack community focused on helping individuals find new careers centered on solving climate challenges.

- KANTAR U.S. MONITOR

33%

33% of Americans cited "support me to find the right option for me to lead a balanced life & live better" as a way brands can help them thrive.

- INTERBRAND

"Dream Job? I don't dream of labor" is a mindset of Gen Z as they redefine the working narrative.

- KANTAR U.S. MONITOR

People are reducing their ecological footprint through intentional yet elegant home aesthetics using natural materials that are beautiful but also safeguard against droughts and other natural disasters.

Pinterest Searches

Rain water harvesting architecture	+155%
Drought-tolerant landscape design	+385%
Rain barrels ideas beautiful	+100%

- PINTEREST PREDICTS

The Women Owned Logo offers an official seal of authenticity to businesses that can prove they're at least **51%** owned by women.

- KANTAR U.S. MONITOR

TOP TRAVEL TRENDS



RESIDENT SPOTLIGHT STAYING POWER: NOW - LONG TERM

Travelers are increasingly interested in supporting and experiencing local culture while destination marketing organizations work closer with residents to co-create communities and share their local way of living. While destinations have considered residents as stakeholders in the past, they are newly highlighting residents as the spotlight of their messaging and a more central fixture of their goals.

64% **32%**

64% of U.S. residents agree “overall, I think tourism is good for my state” yet only half that many (**32%**) feel they are consulted when major tourism developments take place in their area.

- LONGWOODS INTERNATIONAL

The #1 industry trend in a global destination study was “Greater industry, community and government alignment is driving destination competitiveness and brand.”

- DESTINATIONNEXT FUTURES STUDY

Sedona is paying short-term rental hosts \$10K to rent long term.

- NEW YORK POST

6/10

Six in 10 consumers are interested in learning more about travel options that support local cultures and communities, and **nearly two-thirds** of consumers would choose a travel option that supports local cultures and communities, even if it was more expensive.

- EXPEDIA GROUP

The Department of Tourism of the Philippines released a campaign artistically highlighting how its people are behind every visitor’s experience.

- SKIFT

Discover Puerto Rico partnered with locals to release a “Live Boricua” campaign centered on the local way of living.

- DISCOVER PUERTO RICO

27% **34%**

27% of respondents actively familiarize themselves with the local cultural values and traditions of their destination in advance of their trips. However, **34%** said they don’t know how or where to find activities or tours that ensure they are giving back to the local community.

- BOOKING.COM



BEYOND SUSTAINABLE TO REGENERATIVE DESTINATIONS

STAYING POWER: NOW - LONG TERM

Sustainability continues to be of great importance and travelers are expressing a desire for climate conscious trips. As destinations become increasingly susceptible to over tourism, they must consider ways to overcome negative impacts, moving beyond sustainable place practices to regenerative action.

40% 36%

Almost **40 percent** of travelers globally are now willing to pay at least two percent more for carbon-neutral tickets, or about \$20 for a \$1,000 round-trip, and **36 percent** plan to fly less to reduce their climate impact.

- MCKINSEY & COMPANY

96%

96% of survey respondents said it's at least slightly important that "my travel dollars are making a positive impact in the places I visit."

- KIND TRAVELER REPORT IN CNBC

The Republic of Palau awards points to tourists for sustainable behaviors that can be used to unlock exclusive experiences through their app.

- TRENDWATCHING

Resorts such as the Four Seasons Resort Bora Bora offer coral grafting and restoration activities at the property to support environmental protection.

- TRAVEL AGE WEST

The Kind Traveler platform offers users special rates and perks from "curated" hotels when they donate a minimum \$10 to a vetted charity of their choice or in the destination they will visit.

- CNBC

"To protect the species and spaces around them, consumers will increasingly look for solutions that keep their behaviors in tune with the natural world. The desire for highly manicured and human-centered spaces will fade in exchange for the benefits of unruly natural environments."

- KANTAR U.S. MONITOR

"NATIVE HAWAIIANS ALWAYS UNDERSTOOD THAT THEIR ABILITY TO SUSTAIN LIFE IN THE MIDDLE OF THE PACIFIC HAD TO DO WITH LIVING INSIDE THE BOUNDARIES OF THE NATURAL ENVIRONMENT."

- John De Fries, president of the Hawaii Tourism Authority

- THE NEW YORK TIMES

ACCESSIBLE & INCLUSIVE TRAVEL STAYING POWER: NOW - LONG TERM

Consumers are pushing for inclusive and accessible offerings, including in travel. As awareness and demand grows, so do experiences and offerings across the travel industry. Travel brands will need to address the call for inclusive representation in their advertising and have the accessible environment to back it up, allowing people of all abilities to experience the joys of travel.

61% vs 55%

61% of people with disabilities agree with “I am frustrated by brands that treat people like me as an afterthought” compared to 55% of the rest of the population.

- KANTAR U.S. MONITOR

Apple’s “The Greatest” spot is a best in class example of inclusive advertising as it features people with various disabilities—vision, hearing, mobility, cognitive—victoriously navigating everyday life with accessible tech that Apple provides.

- MUSE

Visit Panamá’s “The Next Turn” video series features a blind adventurer to showcase how travelers with different abilities can immerse themselves in the experiences Panamá offers.

- EXPEDIA GROUP

The leading travel booking company for travelers with disabilities, Wheel the World, combines technology and crowdsourcing in its Accessibility Mapping System (AMS), allowing travelers to find detailed accessibility information about accommodations, destinations and experiences in over 25 countries.

- TRAVEL PULSE

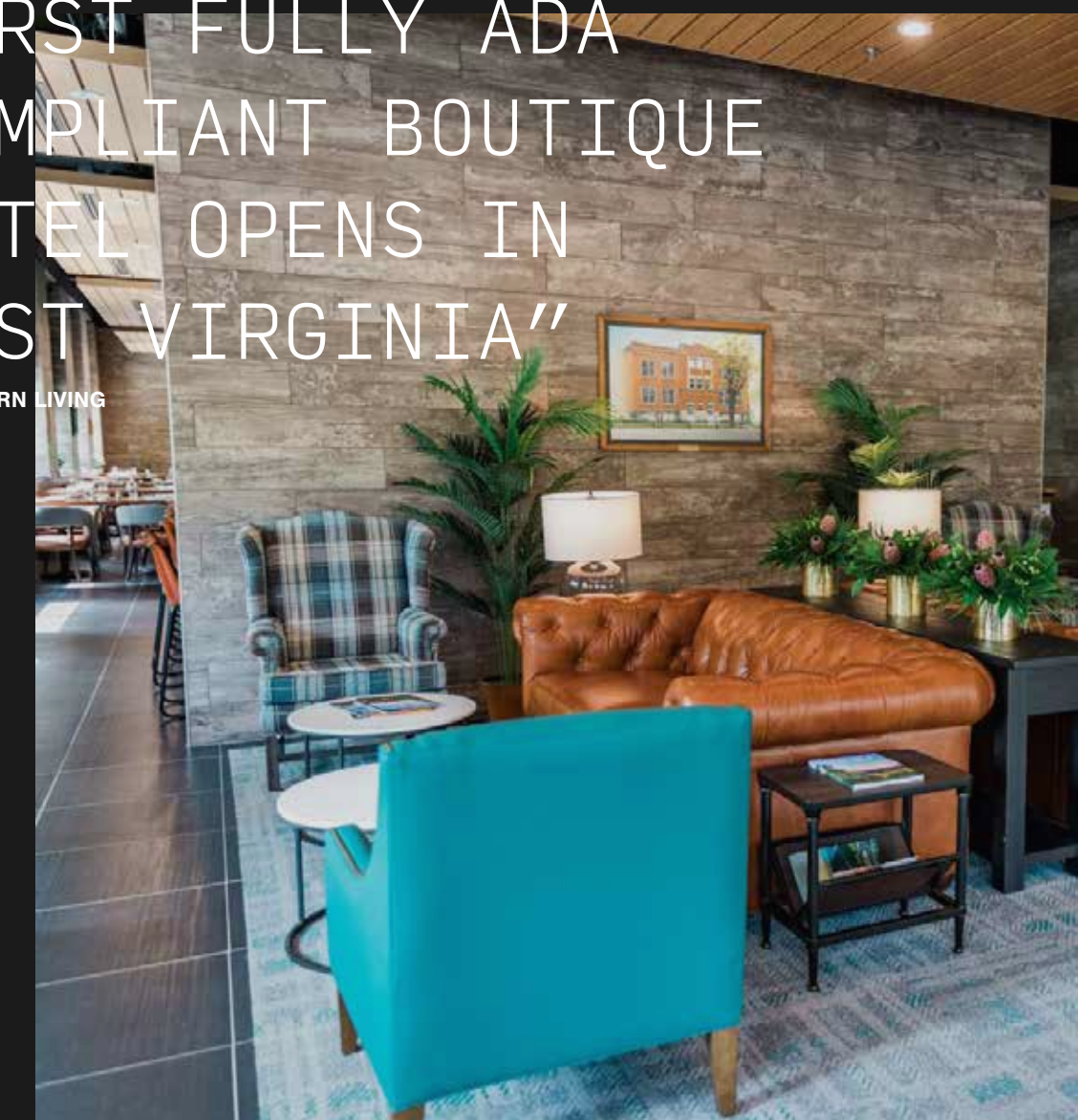
8 / 10

8 out of 10 consumers make their travel plans based on representation and accessible efforts seen in related ads.

- EXPEDIA GROUP

“THE WORLD’S FIRST FULLY ADA COMPLIANT BOUTIQUE HOTEL OPENS IN WEST VIRGINIA”

- SOUTHERN LIVING



TECH-ENABLED FLEXIBILITY STAYING POWER: NOW - MEDIUM / LONG TERM

The rise of digital and technological imperatives is impacting the way travelers plan their trips and seek out experiences. Innovative products including booking apps, digital tools and VR experiences shake up the travel planning process and invite greater flexibility and spontaneity.

66%

66% of Americans agree that travel is the activity that online research is most important for.

- SQUARESPACE NEWSROOM

In a campaign for Corona, travelers who miss their flights are invited to cancel their original booking, adapt their plans, and enter a branded “Corona Gate” in select airports choosing to be flown to a Corona Island Caribbean escape.

- AD AGE

33%

33% of Americans say if a new trip planning technology comes out, they are excited to try it.

- DESTINATION ANALYSTS

57%

57% of travelers wish for a single all-inclusive app for their travel planning and booking needs.

- HEADOUT

Travel booking app, Hopper, added the ability to freeze flight and hotel prices, the power to cancel tickets for any reason, and price drop guarantees that automatically credit customers if rates drop, contributing to Hopper’s 375% increase in monthly revenue compared to its pre-pandemic high point.

- FAST COMPANY

43% 35%

Forty three percent of respondents said they will be turning to virtual reality in 2023 to seek inspiration for their next holiday, while **35%** were interested in embarking on multi-day VR travel experiences.

- BOOKING.COM DATA VIA GLOBETRENDER

Booking.com predicts travel will enter the metaverse “in earnest” in 2023, with travelers able to “try before they buy” through accessing destinations replicated (and reimagined) in the metaverse.

- BOOKING.COM DATA VIA GLOBETRENDER



WELL-ROUNDED WELLNESS ESCAPES

STAYING POWER: NOW - MEDIUM TERM

As the cultural definition of wellness gains broader context, so too is wellness travel evolving with forms of balanced living and wellbeing. Beyond the limitations of nutritional cleanses and spa escapes, the travel industry offers diverse experiences from sleep tourism to mental health retreats that promote a more well-rounded idea of wellness through the lens of balance and personal needs.

The global wellness economy is expected to double in size to roughly **\$200 billion** in annual revenue by 2040. Within the next 20 years, one in two travelers will factor wellness into their travel planning.

- U.S. TRAVEL ASSOCIATION

79%

79% of travelers agree that travel helps their mental and emotional well-being more than other forms of selfcare. Two-thirds of respondents said they didn't realize how important travel was to their wellbeing until it was no longer an option.

- BOOKING.COM

36%

36% of respondents said they wanted to try a spiritual travel experience involving alternative substances such as cannabis or plant-based psychedelics, which are set to become more mainstream.

- BOOKING.COM DATA VIA GLOBETRENDER

42%

Two in five respondents said they aim to attend a silent retreat in 2023, while **42%** want to go on a health hiatus focused on particular issues such as mental health or life milestones such as menopause or pregnancy.

- BOOKING.COM DATA VIA GLOBETRENDER

The Rancho Pescadero in Mexico was designed for wellness in a sense of balance rather than restriction. The hotel offers a lively social experience paired with a 25,000-square-foot "wellness pavilion" offering generations-old local traditions and a 'Hangover Experience.'

- BNN BLOOMBERG

Rosewood Hotels & Resorts, The Zedwell Hotel in London, and Park Hyatt New York are some of many travel properties to invest in sleep tourism offerings aimed at helping visitors achieve a truly restful vacation.

- CNN

Peloton will put bikes in all 5,400 Hilton-branded hotels in the U.S. The partnership with Hilton includes all 18 of the hospitality giant's hotel subsidiaries, including Hampton Inn and DoubleTree.

- CNBC



If you found these insights valuable, or would like to discuss them further, we'd welcome the opportunity to speak with you.

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