



Travel Insights

**SHIFTS: TRAVEL INDUSTRY EVOLUTION FOR THE
TRANSFORMATION ECONOMY**



Shifts: Travel Industry Evolution for the Transformation Economy

The visitor economy is undergoing a fundamental shift as travelers seek more than memorable experiences, but lasting personal impact. Joseph Pine's *The Transformation Economy* highlights this societal pivot, demonstrating how transformations are not merely lofty ideals but represent a \$208 billion market in the U.S. alone (Stone Mantel Transformation Economy Collaborative). Offering transformation becomes increasingly critical amid economic pressures and tightened spending. While travelers pursue their own shifts from x to y, travel brands will also need to evolve to unlock the economic gains available and ultimately help foster human flourishing.





Shifts

1. From time well spent to time well invested
2. From visitors to aspirants
3. From experiences to transformations
4. From acute trips to ongoing journeys
5. From travel brands to transformation guides
6. From locations for visiting to environments for flourishing



From time well spent to time well invested

Society is shifting from being satisfied with entertaining ways to spend time to craving more transformative experiences with enduring impact. Current economic sentiment underscores the need for travel brands to provide value that warrants the investment.

There is currently a tension between economic uncertainty and the desire for experiences.

36% vs 35%

Millennials' top goals for 2026 are split between saving for a vacation (36%) or paying down debt (35%).

- The Harris Poll

U.S. Adults' top priorities for 2026:

1. Financial security & stability (35%)
2. Proactive physical health (16%)
3. Mental & emotional resilience (16%)
4. Deepening key relationships (10%)
5. Pursuit of enjoyment experiences (10%)

- Kantar U.S. Monitor



Economic Eras Throughout History to Today

Commodities and services	Experiences	Transformations
=	=	=
time well saved	time well spent	time well invested



Travel brands that effectively shift to a transformative approach can drive a 20-40% premium on ADR, extend length of stay to 5-12 days, and increase return rate to

30%-60%

- Transformational Travel Council

Offering transformation allows travel brands to shift from competing on amenities and price to competing on outcomes and meaning.

- Transformational Travel Council

Steps for Travel Brands

Evaluate the longer-term value of your offerings and/or the offerings of your partners. Consider what messaging can demonstrate a meaningful return for the time and money spent.



From visitors to aspirants

Travel brands need to reframe how they view their audiences to see them not as another visitor metric but as humans with their own personal motivations, pain points, and aspirations. This framing helps unlock value for both travelers and travel brands seeking to weather economic headwinds.



76%

of American travelers say their 2026 trips are planned around important life milestones.
- AAA and Bread Financial

84%

of respondents agree “over the next year I plan to focus more on personal growth.”
- VML

82%

of Americans are drawn to solo travel to experience personal growth (33%), learn more about themselves (28%) and develop confidence (28%).
- Talker Research for Road Scholar

Audiences face various catalysts that could trigger their desire for a transformative experience:

- **Disruption** – happens to someone (ex: loss of a family member, health scare, getting divorced)
- **Deviation** – happens through the course of everyday life (ex: seeing something in a movie, reading a book that shifts thinking)
- **Discovery** – happens during a planned experience (ex: going to an art museum and getting inspired for change, hearing a motivating message)

- The Transformation Economy

Travelers pursuing transformations are not merely visitors, but “aspirants” with their own ‘From X to Y’ aspirations.

- Joseph Pine, The Transformation Economy

Example: I want to go from being curious about photography to being an experienced travel photographer.



Steps for Travel Brands

Consider how to understand your audiences on a deeper level to uncover their change catalysts, pain points, and motivations by conducting visitor research, analyzing social listening tools, or engaging in open forum sessions.



From experiences to transformations

Transformations build off experiences, with greater immersion pushing from merely memorable to life-changing. However, not all transformations will be complete metamorphoses. The type of shift the audience seeks can range from refining an aspect of their current identity to unlocking a completely new self.

Types of transformation aspirations from *The Transformation Economy*

Refinement

(enhancing identity)

Desiring enhancement of an aspect of oneself.

Example: A business leader visits Aspen and, after spending time in nature, at the opera, and attending the Aspen Ideas Festival, they leave with new thinking.

Ambition

(expanding identity)

Getting significantly better at a dimension of self through skills, knowledge, capabilities, and magnified possibilities.

Example: An individual who enjoys yoga takes an immersive training retreat to deepen their practice and gain a yoga certification.



Cultivation

(enriching identity)

Developing an unrealized attribute.

Example: A professional with an interest in Western culture takes a trip to a dude ranch in Wyoming, learning new skills and embracing a maverick mindset to bring back.

Metamorphosis

(altering identity)

Changing your identity in a significant way

Example: Travel brand 'Explore X' designs transformational travel experiences beginning with a pre-trip intention questionnaire, encouraged reflection along the way, and action steps following the trip for how to integrate the experience into everyday life.



Similar to audiences, organizations and destinations can also undergo transformations.

85%

Whidbey & Camano Islands in Washington partnered with the TTC on a community-led destination stewardship initiative that developed 24+ cultural and ecological heritage trails, generated **\$177 million** in total tourism spend with emphasis on local small-scale business, and drove a repeat visitation rate of 85%.

- Transformational Travel Council

Steps for Travel Brands

Consider which type(s) of change aspiration your travel brand can best serve. Review your offerings and/or your partners' offerings, identifying ways to better communicate the changes your destination or travel brand fosters.





From acute trips to ongoing journeys

Travel has long focused on the time in the destination. However, amplifying the value requires travel brands to extend their engagement across pre-trip, in-destination, and post-trip touchpoints for sustained influence.



91%

of respondents value experiences that stay with them longer after they're over.

- VML

Transformational Travel Council's Foundational Framework

1. Prepare
2. Adventure
3. Think
4. Honor



Steps for a transformational experience to result in true transformation:

- **Pre-trip preparation** – uncovering the motivation for a desired transformational experience and setting intentions.
- **During trip experience & ongoing reflections** – immersing in the experience and reflecting on learnings as they are encountered.
- **Post-trip deeper evaluation and integration** – reflecting on the full journey and infusing new learnings into everyday life.

- The Transformation Economy

Steps for Travel Brands

Evaluate your content and look for ways to share messaging across pre-travel preparation to help diagnose your audiences' needs, during-travel reflections to engage in their experience, and post-travel evaluation with follow-through and ongoing integration.



From travel brands to transformation guides

The role of the DMO has been evolving for years to manage the overall well-being of the destination. Furthermore, the role of all travel brands is expanding beyond promoting experiences to guiding their audiences towards achieving goals.

Organizations rarely use the word “transforming.” Words that accurately describe the offering and connect with customers’ aspirations without intimidating will be the most effective in promotion.

Example Language: elevate your life, refine your craft, cultivate a new passion, accelerate your goals.

- The Transformation Economy



In transformations, destinations play various roles.

- For Refinement aspirations, brand role = Expert
- For Ambition aspirations, brand role = Coach
- For Cultivation aspirations, brand role = Counselor
- For Metamorphosis aspirations, brand role = Alchemist

- The Transformation Economy

Steps for Travel Brands

Consider what role(s) your travel brand can play best. In your messaging, apply less-intimidating words to promote transformative experiences that feel approachable and authentic to your offerings.





From locations for visiting to environments for flourishing

A destination or travel brand is more than a physical setting. It can be a curated environment rooted in regenerative principles that enable people and communities to thrive. This approach increases value and boosts both spending and repeat visitation.



Transformation does not happen in a vacuum. It requires a foundation of regenerative design: the intentional creation of conditions where people, communities, and ecosystems can thrive together.

- Transformational Travel Council

Characteristics of transformational offerings:

Cohesive

Having a clear theme defining the meaningful purpose.

Personal

Reaching inside people to engage them through customization.

Robust

Interacting with guests through entertainment, education, escape, and aesthetic realms.

Dramatic

Allowing ups and downs as the traveler undergoes the hero's journey. The traveler is the hero, not the destination.

- The Transformation Economy

Steps for Travel Brands

Ensure your brand has a core, unifying purpose and emotionally resonant brand strategy at the heart of your efforts. Use this as a grounding place for messaging, programming, and experience offerings. Look for ways to personalize your message and offerings, always making your audience the hero rather than your brand.





If you'd like to learn more or explore partnership opportunities, we'd welcome a conversation.
Please feel free to reach out to **victoria.simmons@bvk.com** and/or **Hero@Transformational.Travel**.

About BVK

BVK is an independent, fully integrated marketing and communications agency that builds brands for organizations making a positive impact on people's lives. With deep expertise in higher education, healthcare, travel and tourism, and mission-driven causes, BVK combines insight, creativity, and strategy to drive meaningful change.

About The Transformational Travel Council (TTC)

Founded in 2017, the Transformational Travel Council is a consultancy, community, and experience design school providing specialized education in transformative experience strategies, human-centered hospitality, and regenerative community development in tourism. By pioneering frameworks and practices within the tourism sector, we illuminate a fresh path for enhancing lives, businesses, communities, and the living systems that sustain them through travel.



8909 N PORT WASHINGTON RD | MILWAUKEE, WI 53217 | 414.228.1990 | BVK.COM



4114 13TH AVENUE SOUTH | SEATTLE, WA 98108 | 206.212.0113 | TRANSFORMATIONAL.TRAVEL