



9 TRENDS

SHAPING TRAVEL IN 2019



Edelman



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As the world settled into the second year of the Trump Administration in 2018, chaos in the 24-hour news cycle became the new normal in the U.S. Travel bans were ordered, blocked and re-instated. There was collusion, corruption and Kavanaugh. Along with Mueller, midterms and migrants. And unfortunately, 2019 started on the wrong political foot, with the U.S. Government completely shut down in January – something that could have a lasting impact on major tourist attractions for years to come. Elsewhere in the world, political battles – from Brexit to battles over populism – will also shape the way people travel beyond their borders in 2019.

But for all of the political chaos that may impact travel this year, there are many bright spots as people pack their bags and take flight.

More people will travel with intention – making mindful choices about where they go and how they spend their money, in order to fulfill a meaningful purpose. Fueled by a saturation of “fake news,” more consumers and brands will re-examine their relationship with social influencers and increasingly turn to trusted sources for travel information and inspiration.

This year, wellness will take a front seat as vacationers think about travel as part of a healthy lifestyle. And advanced technology will enable entirely new travel experiences of all sizes, from a new level of personalization at the hotel level – to new aircraft that will take tourists beyond the earth’s atmosphere.

As we proceed into 2019, this report looks at the various cultural forces that are impacting how consumers are thinking about and planning travel this year. This is a pivotal year for tourism – one that will challenge the travel industry to step up and lead, to reach across the lines that divide us, in order to better serve the growing population that uses business and leisure travel to enrich their lives.

We hope you find this snapshot of 9 Trends Shaping Travel in 2019 informative and inspiring – and that you will join us in watching how the industry adapts in the coming months.



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1 | POLITICS



Given that the U.S. spent the first month of 2019 with the federal government closed, it should be no surprise that politics will be one of the biggest forces affecting travel this year. The U.S. Travel Association estimated that the government shutdown cost the country \$100 million each day in lost traveler spending, and Delta Airlines CEO Ed Bastian tabulated that his company alone had lost more than \$25 million in business. With more than 800,000 federal workers and contractors furloughed in January, the effects of the longest-ever shutdown were felt across the country – trash cans and toilets overflowed with waste in Yosemite and on the National Mall; airport security lines snaked longer as essential TSA workers strained with fewer numbers; and vandals chopped down endangered Joshua Trees in their namesake National Park.

But beyond budget bickering in the U.S., politics will also shape global travel in 2019. In fact, tourism privileges are already being used as bargaining chips between foreign governments. As trade negotiations with China continue to ratchet up, the U.S. State Department has issued heightened warnings for American travelers to China recommended “increased caution” – in turn China has warned its own citizens to exercise caution when traveling to North America. Political unrest in Latin American countries will limit their developing tourism economies. And as Britain continues to try and hammer out the terms of a Brexit deal, the status of its borders with the European Union is on many minds as they think about 2019 holiday getaways.

WHAT TO WATCH: In the U.S., the government is back open (for the time being), but there will be a lasting impact from the shutdown. Overall travel spending may be down for the year – with the losses from January combined with missing backpay for federal subcontractors who might have used those funds for vacation. Public Land will also need time to rebound; some are estimating that it could take Joshua Tree National Park up to 300 years to recover from damage that occurred during the shutdown. Fortunately, when government leaders fail, there is an opportunity for business and nonprofits to lead. Xanterra, which manages concessions in many of the National Parks, was able to rally 13 private businesses together to keep up essential services in Yellowstone when the government was closed. And the National Parks Foundation has been amassing record donations and volunteers to help clean up and do repair work. In the coming year, watch for other tourism businesses and DMOs to rise above politics in service of their customers and the greater good.

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2 | PURPOSE-DRIVEN TRAVEL



The world is chaotic and rapidly changing – politically, financially and environmentally. As we come to terms with those changes, increasingly people are turning to travel as a way to make a positive personal impact with their time and money. National Geographic polled more than a dozen leading industry professionals to ask them what travel will look like in 2019, and all responses pointed to a single commonality: intention. Their respondents consistently said that people want to travel with a greater sense of purpose – they want to go somewhere and make a difference. That could mean choosing a specific destination because there’s a timely need to support the local economy. It could also mean taking a volunteer vacation – a travel segment that has continued to grow in popularity. In fact, REI* reported that its Volunteer Vacations program has grown by more than 100% in the last two years. But purpose-driven travel can also mean simply choosing a specific tour, cruise, hotel or product because your dollars will go to support certain values or causes. The 2018 Edelman Earned Brand study revealed that nearly two-thirds (64 percent) of consumers around the world now buy on belief – a remarkable increase of 13 points since 2017. These “Belief-Driven Buyers” will choose, switch, avoid or boycott a brand based on where it stands on the political or social issues they care about.

WHAT TO WATCH: Recovering destinations will be hot. For 2019, Puerto Rico has topped multiple “where to go in 2019” lists as a destination where travelers make a meaningful difference in the local economy as the island works to fully recover from hurricane devastation. Also earning spots on this year’s top lists: Houston (*The New York Times*) and Montecito (*Travel + Leisure*) – destinations working to get back on their feet after natural disasters. Look for “sustainability” to evolve beyond cards about your hotel towel use into more meaningful community partnerships. Airbnb Experiences has added a portfolio of social impact programs – with 100% of the fees going to the local nonprofits and entrepreneurs featured on those tours. And also watch for the rise of new value-based travel brands – such as 21c Hotels (dedicated to contemporary art education and preservation); 1 Hotels (focused on environmental stewardship and advocacy); and Eaton Workshop (aimed at fostering progressive social change).

* Edelman client

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3 | THE INFLUENCER PARADOX



Among consumer marketers, there is a common assertion that traditional publications are on the decline and social media is the future. Indeed, 2018 was a terrible year for print media – *Seventeen* and *Glamour* ceased publication; *Condé Nast Traveler* cut its print publication from 12 down to eight issues per year; and scores of editors were affected by layoffs and newsroom shakeups. Unfortunately, 2019 isn't off to a great start – with more than 1,000 media jobs cut within one week in January as layoffs hit Verizon Media, BuzzFeed and Gannett. The accepted narrative is that traditional publishers just can't find a successful revenue model in the digital age. At the same time, social media platforms – particularly Instagram – have exploded in popularity: there are now one billion active users on Instagram; the “like” button is used 4.2 billion times per day; and 72 percent of users have bought a product they saw on Instagram. Instagram's new action button could be a game-changer for the travel industry. [All of this is compelling data for marketers, and as more advertising dollars get redirected from traditional channels to social, what has resulted in recent years is a veritable gold rush among social influencers to grab a piece of the sponsorships, free products and hosted travel.] It's also been easy for many of them to game the system with bots that inauthentically increase their follower counts and engagement rates. But times are a changin'. Thanks to the rise of the “fake news” battle cry, exposés on “fauxtography,” and several recent high-profile scandals – including the disastrous Fyre Festival, where 5,000 concertgoers were duped into booking travel and VIP villas based solely on the word of social media influencers – the paradigm is shifting.

WHAT TO WATCH: More people will rethink who they trust for information. Edelman's 2019 Trust Barometer revealed that people are turning to sources that they can rely on. Trust in traditional media is at an all-time high (65%) in North America, compared to social media (34%) – and 71% are worried about false information or fake news being used as a weapon. This is good news for traditional media outlets, despite industry-wide newsroom contraction. But watch for more media brands to evolve creatively in how they deliver travel content – Bloomberg's new “Travel Genius” podcast and *Condé Nast Traveler's* “Women Who Travel” podcast series are examples of a broader “radio renaissance” happening in the media world. Social media will continue to be influential with the travel booking process – but expect more brands to reexamine their relationship with social media influencers. The Edelman 2019 Digital Trends specifically call out that accountability will now be at the forefront of influencer marketing initiatives.



4 | UNDER-TOURISM



Good news! More people globally are traveling than ever before. In fact, according to the United Nations World Tourism Organization, tourism arrivals have grown steadily in the seven years since the global financial crisis – and hit a record 1.3 billion in 2017. Bad news! The rising tourism tide is not lifting all boats at the same rate. With more people traveling internationally for the first time, many of them are heading to the destinations that have been the hot spots for generations – which is why cities like Barcelona, Venice, Paris and Amsterdam are straining to support the masses. They're also starting to crack down – Barcelona and Venice have limited the size of cruise ships that can arrive in port, and Amsterdam has instituted a new €8 tourist tax for each cruise ship passenger. But it's not only cities that are feeling the tourist crush – natural wonders and historic sites, such as the Galápagos Islands, Machu Picchu, Angkor Wat, Bali and even some U.S. National Parks are struggling to cope with record visitation rates. The Faroe Islands will close all of its major tourist sites for a period in April in order to conduct maintenance from a recent surge in visitation. The rising popularity of Instagram isn't helping – a new study in the UK revealed that 40% of millennials will choose a holiday destination based on how "Instagrammable" it is, compared to the weather or value for money. And, some of the top geo-tagged locations in the world on Instagram are located in the very cities that are battling Over-tourism. This tension is why the concept of "Under-tourism" is beginning to take hold: the idea that Over-tourism needs to be tackled by the entire travel industry. Government has a responsibility for building tourism infrastructure in under-served areas; DMOs have a responsibility for storytelling in under-served areas; and tour operators have a responsibility to develop products that take guests out of the city center and into those under-served areas. People are not going to stop visiting the Eiffel Tower, Big Ben and the Venice Canals – but working together, destinations may be able to direct some visitors to come during the shoulder season and others to an under-the-radar spot that could use new tourism revenue.

WHAT TO WATCH: Travel media will do their part to promote Under-tourism. *Skift* has named it one of their "Megatrends" for 2019, and there is a pointed focus on up-and-coming destinations on this year's "where to go" lists. For example, in choosing Zadar as one of its "52 Places," *The New York Times* specifically called it out as offering the same type of old-world Adriatic experience – even though it's often ignored by the hordes of tourists that flock to Dubrovnik, another one of the European cities suffering from Over-tourism. Also featured on the 2019 destination lists: Panama, Columbia, Slovakia, Uzbekistan and multiple African nations – all places with developing tourism industries and no issue with crowds. Over-tourism is a complicated problem, so watch for a variety of creative solutions to address the problem – from a new emphasis on the "quiet season" to campaigns that discourage specific geo-tagging in sensitive environmental areas. But Under-tourism also presents an ideal opportunity for less-known cities and rural destinations, so also look for some DMOs to begin marketing their lack of crowds as an asset!

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5 | THE BUSINESS-LEISURE BLUR



For better or worse, the walls separating business and leisure time are coming down. A 2018 survey commissioned by The Vision Council revealed that nearly half of employed Americans (48%) consider themselves modern day workaholics – the average worker spends about seven-and-a-half hours a day staring at a screen; burns an extra four hours a week just thinking about their job; and 58% say they check e-mail as soon as they wake up. The good news is that for all of our workaholic ways, we’re learning to spend more time out of the office. According to Project: Time Off, an initiative created by the U.S. Travel Association, Americans’ vacation time usage is now at a seven-year high. For many, a solution to taking more vacation time is to combine leisure travel with business travel – creating a “bleisure trip” or “bizcation.” In fact, new SAP Concur* travel and expense data revealed that business travelers adding leisure time to their trips increased by 20% from 2016 to 2017. Also, the phenomenal rise of co-working companies like WeWork, Impact Hub and Knotel have made it easier to work remotely in your home city or abroad. Taking a page from the success of international social clubs like Soho House, WeWork has started offering its own hotel rooms and lodging partnerships.

WHAT TO WATCH: Look for more brands to jump on the bleisure bandwagon. Some companies (such as Edelman!) will provide perks that make it easier for employees to extend business trips in order to gain exposure to a new city. Hotels have also taken note of this trend and are beginning to design lobbies and public areas with co-working in mind. Through its WFH (Work From Hawaii) campaign, Hawaii Visitors & Convention Bureau* created six “residencies” on the six main islands to encourage New Yorkers to take a weeklong working vacation in Hawaii. And lastly, for those professionals with truly flexible schedules, look for more startup companies like Remote Year, which offers the ultimate bleisure trip – a 12-month group travel program that allows people to travel the world while working remotely for around \$2,000 per month.

* Edelman client



6 | THE PURSUIT OF WELLNESS



The trend of traveling for wellness is not a new concept. The world's oldest hotel, Nishiyama Onsen Keiunkan, has been hosting weary guests in soothing hot springs for more than 1,000 years. The Victorians extolled the health benefits of a seaside holiday with saltwater bathing. And desert resort cities like Palm Springs exist today because health tourists of the early 1900s flocked there in search of dry heat. However, as healthcare costs in the U.S. continue to rise – and the overall global wellness market continues to grow (up 10.6% from 2013-2015) – there is a massive surge of interest in travel as a form of self-care. According to the 2018 Global Wellness Tourism Economy, Wellness Tourism is growing twice as fast as tourism overall (6.5% annually vs. 3.2%), and it's forecasted to grow even faster in the coming years to become a \$900+ billion market by 2022. And while North America is the leader in driving Wellness Tourism revenues (\$242 billion annually) and Europe drives the most wellness trips (\$292 million annually), Asia-Pacific countries are growing at a quicker clip – with the number of wellness trips shooting up 33% in the last two years.

WHAT TO WATCH: The travel industry has been quick to embrace this trend, and there are a slew of new products designed to cater to the wellness-minded traveler – from new urban wellness hotel brands (Equinox Hotels, IHG's EVEN Hotels) and room concepts (Hilton's* Five Feet to Fitness) to group wellness tours (G Adventures, Stride Travel) and even a new cruise line targeting health and wellness enthusiasts (Blue World Voyages). Also, there are dozens of new luxury wellness resorts and new wellness programs launching in 2019 – including Miraval in Austin, Texas; Blackberry Mountain in Walland, Tennessee; Six Senses Duxton in Singapore; Rosewood's Asaya Spa in Phuket; and Amanyara in Turks & Caicos. Although wellness tourism has historically been most popular with wealthy travelers (and will likely continue to be) expect travel brands and destinations to develop more wellness activities and options that are accessible to travelers of all budgets – from free yoga and meditation classes to healthy food options and family-friendly hiking and biking maps.

* Edelman client



7 | PERSONALIZATION IS POWER!

As travel brands and destinations have become more sophisticated in the ways they can collect data about their guests, passengers and visitors, the key to differentiation is personalization. Simply tracking consumer search history to serve tailored digital marketing is table stakes. Many savvy brands are going well beyond in order to convert customer data – both digital and human data – into personalized experiences. Hotel brands like Kimpton and Virgin are using detailed surveys to learn more about their guests’ tastes and preferences in order to surprise and delight with tailored in-room snacks and turndown treats. Hilton and Marriott are using their popular mobile apps as a booking tool, concierge and digital key card in order to smooth the travel process for frequent guests. Delta Airlines has equipped flight attendants with a new Guest Service Tool mobile app that helps them identify high-value frequent fliers and passengers with special requests. And Disney Parks and Carnival Cruises have rolled out wearable RFID devices to track daily purchases and movement in order to better anticipate immediate guest needs. As consumers become more aware of data collection and comfortable with tailored recommendations on platforms like Netflix and Amazon, more travelers will want a similar degree of personalization while traveling. According to the online travel provider Amadeus, 86% of travelers value personalized offers – and Skift and Adobe’s* 2018 Digital Transformation Report revealed that younger travelers, in particular, expect their favorite travel brands to offer personalized experiences.

WHAT TO WATCH: The sky is the limit when it comes to personalization. Look for new and inventive ways that hotel brands will allow guests to personalize their rooms – from preferred temperature, lighting, and bedding settings picked in advance – to custom bath amenities and the option to display personal photos or artwork on the TV. But personalization will only ever be as good as the data that’s collected. And while travel brands will continue to invest in the collection of digital data, expect more brands to incorporate humanity into the personalization process through good old-fashioned customer service. Whether that’s discovering a guest prefers their gin martini nightcap in their room versus the crowded bar – and then dispatching a Beverage Butler, like they do at The Nobu Hotel in Miami Beach. Or scanning a guest’s social media posts and surprising them with custom-printed photo chocolates at turndown service, like they do at the Oberoi Rajvilas.

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8 | SPACE: THE NEXT FRONTIER



The idea of space exploration has inspired humans for generations, but 2019 may be the year where this becomes tourist reality. Richard Branson's Virgin Galactic conducted its first successful test flight to near-space in December 2018, and the company may fly its first passengers in 2019. More than 700 people have already paid between \$200,000 and \$250,000 for a ticket. Similarly, Jeff Bezos' Blue Origin is preparing for its first human flight with its New Shepard reusable rocket in 2019. And Elon Musk's successful SpaceX launch in early 2019 earned headlines as "paving the way for a new era of American spacecraft." But while some (very wealthy) tourists may get a chance to travel to space soon, there are plenty of other opportunities in 2019 for regular folks to celebrate space exploration and the wonders of the universe. If the Great American Eclipse in 2017 is any indication – where states in the path of totality reported record visitation rates – people are interested and willing to travel in order to be a part of celestial events. It's the 50th anniversary of the Apollo 11 mission in 2019, and there will be events taking place across the country to mark the milestone – from daily re-enactments of the moon landing at the U.S. Space & Rocket Center in Huntsville, Alabama to a Summer Moon Festival in Neil Armstrong's hometown of Wapakoneta, Ohio. Disney will open the massive, highly-anticipated Star Wars: Galaxy's Edge at both Disneyland and Disney World in 2019. But it's not only the cosmos that is inspiring travel – destinations where the Aurora Borealis is viewable are also reporting sharp increases in tourism. Alaska, for example, had 320,000 visitors in the winter of 2017 – up 33 percent from 10 years ago – something the Alaska Travel Industry Association attributes to more interest in the Northern Lights.

WHAT TO WATCH: Look for destinations, hotels and travel brands to lean into consumer interest in astrotourism and celestial events – creating new stargazing maps and tours, as well as promoting access to telescopes and planetariums. Viking's* newest ocean cruise ship, *Viking Jupiter*, which launches in 2019, features an Explorers' Dome planetarium, as well as a Resident Astronomer and nighttime stargazing sessions. Also, look for space exploration to inspire everything from food (galaxy doughnuts) to fashion (Cartier's new cosmos-influenced line of jewelry, Les Galaxies de Cartier). And then of course watch for new infrastructure to support a real space tourism industry, such as the "Aurora Station" – the first luxury space hotel – which could launch in 2021 and begin welcoming its first guests in 2022. Finally, there's the suggestion of a new "Space Force" to be added to the U.S. Department of Defense .

* Edelman client

Photo credit: Joshua Earle / Unsplash.com



9 | THE FUTURE IS FEMALE



The last year brought us Women's Marches, #MeToo, #TimesUp – and more women elected to Congress than at any other time in U.S. history. Gender equality is (finally) at the forefront of national discussion. Elsewhere in the world, there were also major milestones in the fight for women's rights. In Saudi Arabia, women were granted the right to drive. The winners of the Nobel Peace Prize in 2018 were recognized for their work in acknowledging sexual violence as an act of war. And the Canadian Government committed to spending \$300 million to further gender equality globally. With a message of empowerment at the core, these developments have contributed to a surge of interest in female-focused travel. More women than ever before are traveling for business and leisure – in groups and solo. And we're not talking cliché girlfriend getaways; the pent-up demand is for international tourism and adventure travel. Tour operators that specialize in female travel are reporting huge growth – AdventureWomen, which has been in business for 35+ years, has grown 42% in the last year alone; Wild Women Expeditions, which specializes in outdoor adventures, says it has grown by 1,000% since 2010 and doubled its profits in the last year.

WHAT TO WATCH: The sky is the limit for destinations and travel brands to develop products for intrepid female travelers. But the opportunity is not with the “pink-washing” wine-and-chocolate promotions of yesteryear; the opportunity is for all-female backcountry hiking trips, wildlife safaris and sea kayak expeditions. Maybe with wine and chocolate served afterward. With pent-up demand for these new travel products, so too is there pent-up demand among travel media for stories about the companies and people who are making it happen. After all, the great travel magazines and newspaper travel sections should be the ones to lead the charge in educating the industry about this quickly-growing segment of the industry – *Travel + Leisure*, *Conde Nast Traveler* and *AFAR*, as well as the travel sections of the top daily newspapers in the U.S., including *The New York Times*, *The Washington Post*, *Los Angeles Times*, *Chicago Tribune*, *Denver Post* and many others are all led by women. Beyond the rise in female-only travel, there are timely ways for everyone to celebrate gender equality – for example, you can visit Wyoming*, which is celebrating its 150th anniversary in 2019 of becoming the first state to grant women the right to vote. And in 2020, the U.S. will mark the 100th anniversary of the passage of the 19th Amendment, which guaranteed and protected women's constitutional right to vote.

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