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# 'FUTURE OF' *TRAVEL*

# WELCOME TO 'FUTURE OF'

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Welcome to 'Future Of,' a report that explores what will—and more importantly what should—come next in must-watch categories.

At Backslash, we believe that culture is the biggest opportunity and threat to businesses today. With support from over 300 Culture Spotters, we closely observe and analyze worldwide developments so that TBWA—and our clients—can better understand and anticipate cultural change.

The following report leverages cultural intelligence to unlock four opportunities for disruptive growth in travel. Opportunities that don't just impact how a brand communicates, but point to emerging sources of demand. Within each opportunity we've outlined specific ways for businesses to take action—whether that be through addressing untapped audiences, introducing new services, or investing in product innovation.

The transition from the now to the next is taking place every day. The businesses that play a role in shaping the future will be the ones to secure their place in it.

## METHODOLOGY

This report was born from months of in-depth qualitative and quantitative research, strategic ideation, and collaboration among 44 Culture Spotters from 26 global TBWA offices. Our Spotters bring expertise from their work on some of the world's biggest travel companies—from Singapore Tourism Board, to Hilton, Tourism New Zealand to Singapore Airlines.

# EDGES SHAPING THE FUTURE OF TRAVEL

*What is an Edge?*

Edge / 'ej / noun

A meaningful cultural shift that has the scale and longevity to propel a brand toward a greater share of the future.

See Appendix for complete Edge definitions.



# TRAVEL'S INFLECTION POINT

For decades, tourism has been defined by volume. The industry churned out copy-and-paste itineraries in an attempt to attract the masses. Travelers flocked to cheap flights and affordable accommodations that made frequent trips possible. And travel was treated like an assumed birthright, rather than a respected privilege.

But the days of limitless travel are behind us. "The essential pillars of 21st-century global travel—open borders, open destinations, and visa-free travel—won't return in the short term or even medium term," says Elizabeth Becker,<sup>1</sup> author of *Overbooked: The Exploding Business of Travel and Tourism*. And perhaps that's a good thing. After all, incessant travel has taken a catastrophic toll on our planet, and a tendency to prioritize tourism dollars over residents' well-being has destroyed the cultural fabric of our most cherished destinations.

Now, as airport traffic ramps up and hotels approach max capacity, businesses are making a point not to fall back into old ways. "Some in the tourism industry are planning for a post-vaccine return to travel that's better than it was before March 2020—greener, smarter, and less crowded," notes Elaine Glusac for the New York Times.<sup>2</sup>

To achieve better balance, the category will need to shift focus from high volume to high value. Responsible restrictions will help us preserve the places we love most. Trips personally planned by locals will distribute visitors more evenly. And a nomadic new business class will stay longer, marking the end of disposable turnaround trips. By trading mass-produced solutions for more intentional services, businesses can reset tourism the right way.

## **IN THIS REPORT WE EXPLORE HOW:**

- Precise tracking will create a more harmonious business-to-traveler relationship
- Demand for work mode will spur hotel redesigns
- Psychedelics will raise the bar for transformative travel
- The weird and whimsical will reposition luxury travel
- And much more...

# TRAVEL DISRUPTORS TO WATCH

## Intrepid Travel

*For rebuilding tourism responsibly*

The world's largest B Corp travel company recently introduced 42 new low-carbon tours, and will remove all flights under 90 minutes from its top 50 itineraries by 2022. Intrepid is also taking action to improve access to COVID-19 vaccines around the globe.

## FlyPet

*For simplifying travel for pet parents*

FlyPet makes it all the easier to bring your pet on your next trip. The Brazil-based company handles everything from pet travel documentation, to pre-flight animal health reviews, to animal-friendly itineraries—ensuring your pet is treated just as well as you are.

## ViaHero

*For doing away with copy-and-paste travel guides*

ViaHero works with verified local "heroes," or travel guides, who create bespoke itineraries based on your interests. In a time when AI is taking over trip planning, ViaHero is promising that no two itineraries will be the same.

## Byway

*For spotlighting flightless travel*

Byway's "slow tourism" packages include custom, off-the-beaten-path experiences with all the scenery and no harmful air travel. Whether by train, boat, or bicycle, Byway is proving that the journey can be just as memorable as the destination.

## Rutopía

*For championing community-based ecotourism*

Rutopía connects travelers with local hosts in rural Mexico. By emphasizing authentic experiences and funneling money back into indigenous communities, Rutopía is raising the bar for ethical tourism.

## Umaya Village

*For creating a community of nomads*

As the Caribbean's first remote work village, Umaya is opening the door for a new age of productive and pleasurable living. In addition to ocean views, Umaya residents will enjoy adventure trips, community activities, and professional development sessions.

## Selina CoLive

*For replacing apartment leases with co-living leases*

Selina CoLive is catering to a new class of nomads looking to live and work remotely from different worldwide locations. The hospitality company offers affordable accommodations complete with coworking space, daily wellness practices, and above all—a community feel.

## 700,000 Heures

*For being the world's first wandering hotel*

700,000 Heures is a hotel with no permanent address. Its location changes every six months, and each iteration aims to elevate the community it becomes a part of. The unique concept is putting cultural immersion at the center of luxury travel.

## Dylan Grace

*For helping people travel with intention*

Dylan Grace is a travel coach who helps clients discover the "why" behind their vacation goals. After a one-on-one consultation, she will create an itinerary that "supports and sustains you emotionally, physically, spiritually, and financially."

## Silo Wellness

*For providing inclusive psychedelic trips*

Silo Wellness is giving people a safe space to "achieve self-actualization with the perception-shifting assistance of psilocybin." Their latest series of retreats is tailored to specific groups—including women, couples, and the LGBTQIA+ community—meeting rising demands for meaningful connection.

## Bill Bensley

*For fulfilling our escapist desires*

Bill Bensley has spent the last 32 years designing some of the most imaginative hotels and resorts in the world—and he's showing no signs of slowing down. His latest project? A sustainable human zoo in China where animals roam free and guests are caged.

## Lithodomos

*For making it possible to rewind time, anywhere*

Lithodomos turns historical locations, archaeological sites, and museums into educational VR experiences. By allowing anybody with a smart device to travel back in time, the Aussie startup is sparking modern appreciation for the ancient world.

# FOUR GROWTH OPPORTUNITIES AT A GLANCE

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## THE GREAT REDEMPTION

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A more mindful era of tourism will rebalance the scales, considering a place and its people as much as the traveler. Explore how the untourist, responsible restrictions, and travel trackers will reset the category.

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## ANCHORLESS LIVING

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As we shift from one-off vacations to always-on travel, tourism companies will be forced to cater to a life in flux. Learn how work mode, nomad concierges, and flex packages will pave the way for a new kind of business travel.

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## TRAVEL'S TURN INWARD

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As travelers turn inward, itineraries will increasingly be built around the mind and body. Looking forward, mind trips, interactive culinary experiences, and evidence-based amenities will be the markers of a truly transformative getaway.

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## DESTINATION UNKNOWN

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The pursuit of new frontiers will redefine travel aspirations. Explore how hedonistic escapes, destinations at the ends of the earth, and create-your-own virtual adventures will bring magic back to travel.



# THE GREAT REDEMPTION

“FOR SO LONG, TOURISM SUCCESS WAS DEFINED BY GROWING THE NUMBERS—NUMBERS OF VISITORS, NUMBERS OF CRUISE PASSENGERS. EVEN BEFORE THE PANDEMIC, THERE WAS A NEED FOR REBALANCING.”

— Gregory Miller, The Center for Responsible Travel<sup>2</sup>



## THE PANDEMIC UPENDED TRAVEL AS WE KNEW IT, MARKING TOUGH TIMES FOR THE INDUSTRY.

### TRAGEDY FOR TOURISM

2020 was declared the "worst year in tourism history" by the World Tourism Organization, with one billion fewer international tourists than the previous year.<sup>3</sup>

### A LONG ROAD TO RECOVERY

Global tourism isn't expected to return to pre-pandemic levels until at least 2024.<sup>4</sup> "The lack of business travel—as companies take a careful approach to reopening—and lingering consumer hesitation are prolonging the road to recovery," notes Adobe Analytics.<sup>5</sup>

### HOSPITALITY'S MASS EXODUS

Half of former hospitality workers said that they wouldn't return to their previous job in the industry. Low pay, bad benefits, and a stressful workplace are key factors putting people off.<sup>6</sup>

### RISING TRAVEL ANXIETY

Some therapists are seeing a spike in people experiencing travel anxiety as the world starts to open up again.<sup>7</sup> A recent poll identified the top two travel fears as getting stuck in another country and catching the coronavirus.<sup>8</sup>

### RESTRICTIONS STICK AROUND

Current indicators suggest that travel restrictions are likely to be with us a while, not only because just a portion of the world is fully vaccinated against Covid-19, but also because of political and environmental reasons.<sup>9</sup>

## BUT TIME AWAY FROM TRAVEL ALLOWED US TO SEE THAT WE'VE BEEN DOING IT WRONG ALL ALONG.

### IMPACT AWAKENING

The impact of COVID-19 has inspired 63% of global travelers to avoid crowded tourist attractions on their next trip. More than more than half (55%) of travelers also want to see how their money is going back into the local community.<sup>10</sup>

### PUTTING RESIDENTS FIRST

In March, UNESCO proposed a plan to make Venice a "world sustainability capital" by diverting tourists to new destinations, encouraging more overnight stays, and enabling the repopulation of the city with new residents.

### INDIGENOUS TOURISM INVESTMENTS

The Queensland Government is investing \$10 million to develop indigenous tourism through 2020 and 2021. Latest research shows that more than 324,000 international visitors to Queensland took part in an indigenous tourism activity.<sup>11</sup>

### NATIONAL PARK PROTECTION

After seeing how natural habitats thrived thanks to a break from tourist crowds, Thailand will close its national parks for two to four months each year.

### REINING IN BUSINESS TRAVEL

A Bloomberg survey of 45 large businesses in the U.S., Europe, and Asia shows that 84% plan to spend less on travel post-pandemic. Primary reasons for the cutbacks included the ease and efficiency of virtual software, cost savings, and lower carbon emissions.<sup>12</sup>

### RESPONSIBLE TRAVEL REWARDS

Scandic, the largest Nordic hotel operator, has developed a list of ten good travel habits, including skipping daily room cleaning and respecting local guidelines. Guests who sign up for the program will receive 2,000 member points that can be used toward future stays at Scandic hotels.

A MORE MINDFUL ERA OF TOURISM WILL  
*REBALANCE THE SCALES,*  
CONSIDERING A PLACE AND ITS PEOPLE AS  
MUCH AS THE TRAVELER.

WAY IN:

# THE UNTOURIST

*The rise of anti-tourism will put power in the hands of locals.*

While countries around the world have certainly missed tourism spending, one thing they haven't missed is tourists behaving badly. Besides the obvious environmental harms, tourists have long been linked to a series of negative social consequences—from gentrification, to diluting local culture, to increasing crime rates, to driving out small businesses. Kyoto is one such city where residents are enjoying the pandemic reprieve from inconsiderate crowds, even if it does mean saying goodbye to \$3 billion in annual foreign visitor spending. Mimiko Takayasu, a proprietress of a century-old Kyoto teahouse, is one of many locals dreading the return to pre-corona tourism. "All of Gion was turned into a visitor attraction, like an amusement park, and maiko (apprentice geisha) were treated like Mickey Mouse," she said.<sup>13</sup>

This love-hate relationship with tourists has gone on long enough. As tourism resumes, a fresh start is needed. One where cities and companies put residents first, where culture is respected, and where authentic experiences shine.

In an effort to prevent every city from becoming a bustling tourist trap, some companies are putting power in the hands of locals. Travel app ViaHero ensures that no two trips are the same by letting a local personally plan your trip. Thailand-based Local Alike co-creates journeys with local communities to bring people the most authentic experiences possible. And Mexican startup Rutopía connects visitors with indigenous hosts in rural communities. As travelers increasingly look to avoid overcrowded attractions, these mindfully curated itineraries will distribute tourists (and their dollars) more fairly.



Both domestic and international tourists can benefit from community-based travel. For those traveling within their home borders, there's a precious opportunity to reconnect with local culture—whether it's by learning the indigenous language, supporting local artisans, or gaining a new appreciation for traditional practices. At Colorado's Zapata Ranch, for example, guest are fully immersed in life on a working cattle and bison farm while learning about ranching's role in conserving the natural world. Such enriching experiences could also serve as a way to make tourism work more fulfilling in a time when companies are struggling to attract and retain employees.

For international travelers, the anti-tourism movement will mark the end of copy-and-paste vacations. Think fewer jam-packed tour busses, and more small-group excursions off the beaten path. After all, people travel to feel connected to new places and new people. So let's make those connections count.

## \ WHAT IF...

Hotel chains consulted with locals? Designing spaces and experiences that forge genuine cultural connections.

WAY IN:

# RESPONSIBLE RESTRICTIONS



*Embracing regulation will help us preserve the places we love.*

The world's most popular destinations have had enough. Mount Everest is clogged with novice climbers. Foot traffic on Machu Picchu is causing irreparable damage. And national parks are literally being loved to death by nature-starved tourists. Up until recent years, travel has been limitless and relatively unregulated. But things are about to change. The pandemic provided our planet with a much-needed break from crowds—allowing us to see what's possible when nature has a chance to restore itself. Now, destinations must rethink who they allow in, and at what cost.

Though restrictions are not entirely new to tourism, they are rapidly becoming stricter and more frequent. Earlier this year, Amsterdam announced plans to cut crowds by banning foreign tourists from cannabis cafes and halting red-light district tours. Cities including Prague, Budapest, and Vienna have all imposed limits on short-term vacation rentals. In April, France banned domestic flights on routes that can be covered by train in under 2.5 hours. And most recently—just one month after banning large cruise ships from the Venice lagoon—Venice announced plans to set quotas and charge visitors for admission starting summer 2022.

While lawmakers have been leading the charge on regulation thus far, it can't all be left up to them. Businesses can do their part by setting visitation limits, implementing lotteries or reservation systems, and promoting travel to less popular locations. As the gatekeepers of destinations, airlines will have an especially important role to play. The mayor of Maui's recent plea for airline officials to reduce passenger capacity to the island signals the kind of teamwork that will be required going forward. To ensure these new rules don't favor the wealthy, it's also essential that businesses keep regulations fair and altruistic. Rather than simply increasing fees, for instance, how can hospitality companies prioritize visitors who are staying longer or traveling sustainably?

Though this new era of controlled tourism will surely bring positive progress, it will also bring new tensions. To mitigate consumer frustrations, companies will need to over-communicate the rationale behind their restrictions. Transportation players can clearly break down the environmental math behind their decisions. Fully booked hotels can redirect people to alternative locations with open rooms. And booking sites can develop guides detailing the latest rules and why they were created. It's time to face the music. Because if we don't protect our beloved destinations now, there will be no tourism industry in the future.

## \ WHAT IF...

The new loyalty program rewarded the most responsible travelers? Helping businesses keep the right people coming back.

WAY IN:

# TRAVEL TRACKER

*Precise tracking will create a more harmonious business-to-traveler relationship.*

Travelers do a lot of planning to make their trip as perfect as possible. But between overbooked flights, luggage delays, and hotel rooms not being ready at check-in, it rarely seems as though businesses were equally prepared for your arrival. The good news, however, is that AI is coming to clean up travel's mess. Looking ahead, smarter tracking will mean a smoother experience for customers, and increased efficiencies for the companies on the other side.

Airports—a notoriously stressful travel environment—are already getting a data-driven makeover. The Helsinki Airport, for example, uses AI to "ensure passengers have all the information they need before they even think to ask for it."<sup>14</sup> The airport includes digital signs that show each passenger how long it will take them to walk to their gate, terminal signs that change language according to the nationality of the passenger passing by, and the ability for visitors to give real-time feedback around things like restroom cleanliness and vending machine stock. The airport upgrades also included an automated parking plan, which was proven to cut delays by 61% and save an estimated \$555,000 during a monthlong 2018 pilot.<sup>15</sup> And that's just the start. Over in the U.S., Delta is currently testing a multi-view airport screen that uses "Parallel Reality" technology. Translation: up to 100 people will be able to stare at the same exact screen at the exact same time, and all see different information based on their personal trip details.



More advanced planning could also save resources. Currently, most hotel rooms come equipped with the same standard amenities: plastic water bottles, an array of snacks, a stack of towels, a bar of soap, etc. But what if guests could select what they wanted in their room ahead of time—preventing unused towels from being re-washed and mostly full shampoo bottles from being thrown out? Similarly, asking guests to make restaurant and spa reservations in advance could help resorts perfect their staffing.

In this way, Nick Price, CEO of NetSys Technology, sees hospitality companies eventually functioning more like Amazon. Price envisions a world where a traveler will fill their shopping basket with exactly what they need for an upcoming trip—say, a room for five days, two evening restaurant reservations, a bottle of champagne in the room, and a taxi from the airport. "Now that is a basket of goods. That is hotel retail. Not a single hotel company that I'm aware of anywhere that can do that, and yet Amazon does it every day," he says.<sup>16</sup> Beyond taking the guesswork out of customer demand, such a model would make major strides in boosting personalization. A more measured approach to travel awaits.

## \ WHAT IF...

Travelers preselected their trip requirements—from airport transportation to hotel room amenities—allowing companies to anticipate every detail?



# ANCHORLESS LIVING

THE IDEA OF DIGITAL NOMADISM—SETTING UP A VIRTUAL OFFICE FROM JUST ABOUT ANYWHERE—HAS BEEN POPULAR IN THE MORE WANDERLUST-FILLED CORNERS OF THE TRAVEL WORLD FOR THE PAST DECADE. BUT WHEN OFFICES CLOSED LAST YEAR, THE PIPE DREAM BECAME A POSSIBILITY FOR MANY.

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Amy Farley, Fast Company<sup>17</sup>

## THE DIGITAL NOMAD LIFESTYLE HAS GONE MASS, BLURRING THE LINES BETWEEN WORK AND VACATION ALONG THE WAY.

### A NEO-NOMADIC WORKFORCE

Traditional job holders who are digital nomads have overtaken independent-worker nomads over the past year thanks to worldwide work-from-home orders.<sup>18</sup>

### WORK-TRAVEL BALANCE

Fifty-seven percent of people across income brackets plan to travel out of town while working remotely when COVID-19 restrictions are lifted.<sup>17</sup>

### EXTENDED GETAWAYS

Airbnb revealed that nearly a quarter of users booked stays of 28 days or more between January and March 2020—a 14% increase from 2019.<sup>19</sup>

### GROWN UP GAP YEAR

Adult gap years are on the rise as people reevaluate their priorities. These career breaks can mean anything from a three- to six-month-long company-approved sabbatical, to quitting your job and hitting the road for a year.<sup>20</sup>

### REDEFINING CITIZENSHIP

Google searches for "digital nomad visa" have increased by 350% over the last year.<sup>21</sup>



## A WORLD MOVING ABOUT MORE FREELY WILL REQUIRE SERVICES THAT CATER TO LIFE ON THE GO.

### WORK FROM ANYWHERE

Office closures are opening up new travel opportunities. An April 2021 study found that more than half of Americans had already taken a trip, or were planning to, as a result of being remote.<sup>22</sup>

### HOTEL SUBSCRIPTIONS

The Observer predicts that "By 2025, the hotels that remain will focus more on subscriptions than nightly rates."<sup>23</sup> European hotel brand Zoku is staying ahead of the trend with a new subscription service that lets remote workers spend a month in each of its Amsterdam, Copenhagen, and Vienna properties.

### TRAVEL AGENT REVIVAL

An increasingly complex travel landscape calls for one-to-one assistance. According to American Express Travel's 2021 Global Travel Trends Report, nearly 60% of worldwide travelers want to use a travel agent to help plan and customize their next trip.<sup>24</sup>

### PROTECTION, PLEASE

In a recent survey, 70% of Europeans and 64% of Americans indicated they would be more likely to purchase travel insurance as a result of the pandemic.<sup>25</sup>

### LAST-MINUTE BOOKINGS

Fifty-one percent of all hotel bookings on the travel app Hopper are made within 48 hours of check-in. In response, the company launched a last-minute booking feature that helps travelers find the top deals in a crunch.<sup>26</sup>

### A FRESH TAKE ON RENT

Blueground offers furnished, move-in-ready apartments in 15 cities and three continents around the world. Properties can be rented month to month or for the long haul, making it easy to "show up and start living."<sup>27</sup>

**AS WE SHIFT FROM ONE-OFF VACATIONS TO  
ALWAYS-ON TRAVEL,  
TOURISM COMPANIES WILL BE FORCED TO  
CATER TO A LIFE IN FLUX.**

# WAY IN: WORK MODE

*A new business class is reshaping travel criteria.*

The tourism sector has long banked on business travel for a steady, year-round revenue boost. Then came COVID-19. Suddenly, international meetings moved to Zoom, conferences became virtual, and work events fell by the wayside. And with them went over \$1.4 trillion worth of annual business travel spending.<sup>27</sup> But when occasion-based business travel stopped, another kind of travel began. Remote workers are packing up their laptops and embarking on long-term escapes from their home offices—sparking a hopeful travel revival. To win these neo-nomads over, the tourism sector will need to activate work mode.

Destinations and hotels across the globe are already racing to become remote work-ready. Thirty-two countries and counting now offer some form of digital nomad visa. Hotels are promoting "workcation" packages that include access to private working space, high-speed wifi, tech support, office essentials, and flexible evening checkouts. Booking services like Jubel and Sojrn curate experiences that combine work needs with personal passions. And national parks in Japan and elsewhere are boosting internet access in a push to attract teleworkers.

This nomadic mindset is also giving rise to new travel criteria. In January, UK telecoms provider CircleLoop launched the Digital Nomad Index, which ranks 85 countries based on factors like cost of internet speed and rental apartments, search statistics for remote jobs, and data from the World Happiness Report. The five countries deemed most digital nomad-friendly were Canada, the UK, Romania, Sweden, and Denmark.



With hybrid and remote work here to stay, it's safe to say that tourism companies are not losing their business class. It's simply becoming bigger and more diverse. And as it does, every travel business would be wise to prepare for their arrival. Imagine specific hotel sections designed for long-term living and working—complete with office nooks, kitchenettes, and ultra-high-speed wifi. How about special loyalty programs for employers looking to bring remote workers together a few times a year? Or, having the option to turn on a "work-ready" filter when booking your next Airbnb to ensure your space was equipped with all the essentials?

Looking forward, location-independent workers will inspire a fresh take on amenities, subscription models, and cost structures. The new bleisure isn't about squeezing some sightseeing into your three-day work trip. It's about living—and working—wherever you please, however you please.

## \ WHAT IF...

Hotels doubled as coworking communities? Providing space for remote workers from different disciplines to come together and share ideas.

WAY IN:

# NOMAD CONCIERGE

*Nomad-centric services will simplify life on the go.*

What if you could work beachside in Barbados for a few months, hop over to Spain for a summer of personal and professional bliss, and finish the year off working remotely from Thailand? While it sounds like a dream, it's also a logistical nightmare. There's leases to consider, currency to convert, lots of things to ship or put in storage, pets you can't abandon, endless visa paperwork, the list goes on. Add in required COVID-19 tests, ever-changing quarantine policies, and vaccine passports, and things get even trickier. It's no wonder why more than two-thirds of global travelers say that travel has become more stressful in the current climate.<sup>28</sup> As more people aspire to living and working around the world, it will be in businesses' best interest to remove barriers to nomadic life.

A slew of new solutions are already popping up to help people navigate life on the go. The Singapore Changi Airport created a safe travel concierge app where visitors can easily access up-to-date information, complete their travel checklist, and book a COVID-19 test. The "nomadify" platform is connecting people with remote work job opportunities and expert advice. Pet-friendly flights and hotels are giving dog owners one less thing to worry about. And programs like The Family Workation are offering coworking retreats complete with affordable childcare, so parents don't have to miss out on the remote work revolution.



Though the exact number of digital nomads is hard to pin down, surveys around the world have shown that most workers want to continue working remotely in some way.<sup>29</sup> And every company should be thinking about how to help them live out their digital nomad dreams. For instance, travel agencies can take on the responsibility of securing digital nomad visas and outlining everything from health insurance considerations to local mobility logistics. Travel suppliers can eliminate the need for currency conversions by becoming crypto-friendly. And travel insurance companies can create a nomad-specific coverage plan. If the obstacles are removed, the nomads will come.

## \ WHAT IF...

Hotels and airlines made it easier for nomads to get from A to B? Allowing long-term travelers to fly luggage free.

WAY IN:

# FLEX PACKAGES

*A more flexible era of travel is upon us.*

Risk-free travel bookings are no longer a luxury. They're the expectation. Travelers were afforded more flexibility during the pandemic, and they're not willing to give it up anytime soon. According to a 2021 Google study, 57% of people expect travel bookings to be flexible,<sup>30</sup> yet 31% of tourism managers still are not set up to offer flexible booking options.<sup>31</sup> Fluidity is especially important for the growing number of remote workers looking to mix up their location. To lure people back on planes and into hotels, companies should consider new packages and policies built around a life in flux.

Ever-changing COVID-19 restrictions are only heightening demands for flexibility. According to Marco Corradino, CEO of lastminute.com, the proportion of bookings departing within the same week is 200% higher than last year due to people evaluating the level of risk associated with each location. "This 'last chance' mindset could have a potentially positive impact on the industry moving forward, with people leaping to take advantage of opportunities as soon as they arise," says Corradino.<sup>32</sup>

As travel becomes more fluid, people will increasingly seek out options suited to their nomadic lifestyles. One appealing player giving rent a run for its money is Selina CoLive. The hospitality company offers a CoLive Flex program where guests can stay at up to 10 different worldwide Selina locations over the course of 30 nonconsecutive nights. Guests have five whole months to redeem their 30 nights, so they're free to stop home, or wherever else, as they please.



Similarly, back in May, APA Hotels offered a deal that allowed guests to hotel hop across any of their Japan locations for 30 consecutive nights. The monthlong getaway was priced at ¥99,000 (\$900), making it cheaper than rent in most Tokyo apartments.

This new era of always-on travel will affect everything from airline loyalty programs, to hotel reservations, to travel insurance models. And beyond just dropping change and cancellation fees, businesses should be exploring price structures that appeal to the spontaneous traveler. Consider, for instance, if airlines allowed employers to buy a discounted bundle of 15 flights to key client locations that could be redeemed at any points throughout the year. In a time when everything feels uncertain, the fine print on travel bookings should be one less thing to fret about.

## \ WHAT IF...

Hotels offered special packages based on amenities needed and length of stay? Making long-term hotel living more practical.

# TRAVEL'S TURN INWARD

“ THERE'S THIS NEW LEVEL OF INTENTION AROUND OUR LIVES. SO TRAVEL IS BECOMING LESS ABOUT THE ‘WHERE’ AND MORE ABOUT THE ‘WHY.’ WHY AM I TAKING THIS TIME AWAY? WHY AM I GOING TO THIS PARTICULAR PLACE? WHY DO I WANT TO FEEL THIS WAY AND HOW CAN THIS TRIP SUPPORT IT? ”

— Dylan Grace, Personal Travel Coach<sup>33</sup>

## AFTER YEARS OF STEADY GROWTH, "WELLNESS" HAS OFFICIALLY TAKEN OVER TRAVEL.

### WELLNESS TOURISM EXPLODES

The global wellness tourism market reached \$735.8 billion in 2020, and is expected to grow at a CAGR of 6.6% to reach \$1.2 trillion by 2027.<sup>34</sup>

### SEEKING HEALING

47% of people indicate wellness and mental health as a top motivator for traveling in 2021.<sup>35</sup>

### PUTTING HEALTH FIRST

"All around the world, more people are incorporating elements of health, prevention, self-actualization, experience and mindfulness into their daily lives. It is not a surprise that people now expect to continue their healthy lifestyles and wellness routines when they are away from home," notes the Global Wellness Institute.<sup>36</sup>

### RISE OF RURAL TOURISM

According to a CNN report, the appetite for rural tourism is so strong in China that leading booking platform Trip.com is investing one billion yuan in a five-year plan to grow the sub-sector.<sup>37</sup>

### NATURE ESCAPES

Booking.com data reveals that trips that involve walking, hiking, and generally being in nature have been among the most in-demand activities since the pandemic began.<sup>38</sup>

## IN A CROWDED LANDSCAPE, COMPANIES WILL BE FORCED TO DEFINE WHAT WELLNESS MEANS FOR THEM.

### NEW WELLNESS ROLES

The luxury Raffles Bali resort recently introduced Wellness Butlers who arrange day-to-day wellness treatments and take guests on "journeys of discovery" through cultural experiences.

### SPOTLIGHTING SLEEP

Hotels and wellness resorts are promoting sleep as the new luxury. Montage Palmetto Bluff is hosting its first sleep-focused Well Living Weekend this summer. And the renowned Rancho La Puerta resort now offers a class called "Computer Vision and the Effects of Blue Light and Sleep."

### NUTRITION CONSULTATIONS

At the Meadowland Napa Valley resort, guests can receive a one-on-one consultation with a nutritionist and take part in healthy cooking classes.

### SOCIAL WELLNESS

Swiss-based Aman group is set to open a suite of "social wellness" hotels under the name Janu in 2022. The sites will facilitate opportunities for human connection and co-learning by encouraging guests to engage with the local community and with each other.

### INDIGENOUS EDUCATION

Indigenous experiences are defining a more equitable approach to wellness. Tasmania's award-winning Wukalina Walk, for example, is a three-day First Nations-owned and led journey across rural bushland and coastline by foot. Guests stay in domed-ceiling huts along the way for authentic immersion into Aboriginal culture.

**AS TRAVELERS TURN INWARD, ITINERARIES  
WILL INCREASINGLY BE BUILT AROUND  
THE MIND AND BODY.**

# WAY IN: MIND TRIPS

*A transformative trip starts with setting intentions.*

We've all had those "I need a vacation" moments. And if we needed a vacation before the pandemic, we most certainly need one now. According to Gallup, more people reported feeling sad, stressed, worried, and angry in the last year than at any other point in the company's 15 years of emotion tracking.<sup>39</sup> As the mental health crisis deepens, people will be seeking getaways centered around emotional healing. But whereas mood-boosting vacations of the past were marked by massages, nature walks, and morning teas, the future will be filled with psychedelic retreats, therapeutic experiences, and spiritual healing.

The first step of an effective trip is defining your desired emotional state—a service more travel players are now adding to their repertoire. New York-based travel coach Dylan Grace helps people identify the emotional benefits they want from their trip, then develops an itinerary around their goals. Meanwhile, Irish operator Kilurg Travel targets consumers looking to deepen self-knowledge through a coaching service that meets before, during, and after their trip.

A desire for transformative experiences is also shattering stigmas around mind-altering drugs. Cannabis, psilocybin, and ayahuasca, in particular, are all having a major travel moment. As the first Southeast Asian nation to legalize medical marijuana, Thailand is hopeful that cannabis tourism will help the country recover from the pandemic travel slump. According to Prohibition Partners, Asia's legal cannabis industry is projected to reach US\$12.5 billion by 2024.<sup>40</sup> And over in the US, cannabis tourism's rapid growth is already driving up demand for everything from dispensary tours to "Bud and Breakfasts."



Psychedelics are experiencing a similar upswing. Recognizing the increased interest in magic mushrooms, Silo Wellness recently launched a series of psychedelic retreats tailored to specific groups—including women, couples, and the LGBTQIA+ community. According to Silo Wellness, the goal of the Jamaican getaways is to "provide safe spaces for individuals with similar goals to commune, connect and achieve 'self-actualization' with the perception-shifting assistance of psilocybin."<sup>41</sup> And considering the 2021 World Happiness Report cites that loneliness and loss of connection were key drivers of decreased happiness last year, these shared experiences are needed now more than ever.<sup>42</sup>

This global mental health awakening calls for a major shift in how the tourism industry operates. For starters, tourism boards and hospitality companies should be catering their offerings for a range of emotional needs. Whether it's connecting grieving guests with death doulas, offering special packages to treat burnout, or incorporating hypnotherapy, it's time travel got personal.

## \ WHAT IF...

Travel offerings were categorized according to the desired emotion rather than the location?

WAY IN:

# THE NEW APPETITE

*It's time to say goodbye to the gluttonous vacation.*

Food has always been central to the travel experience. Google searches for "top foodie destinations" have remained strong over time. Blogs ranking the "must-visit bars and restaurants" have encouraged us to create full travel itineraries around our stomachs. And we've been quick to excuse overeating and overdrinking on vacation as "treating ourselves." While our fixation on culinary tourism isn't fading anytime soon, it's long overdue for a mindful makeover.

The pandemic has forced an individual and collective reckoning with careless consumption. Faced with health scares and climate concerns, individuals are now reevaluating what's on their plate and forming a healthier relationship with food. The grow-your-own-food movement is gaining serious momentum. Climate-friendly diets are moving into the mainstream. And foraging—the act of identifying and collecting food resources in the wild—is on the upswing. As this shift makes its way to the tourism sector, businesses will be forced to define a new kind of pleasure. One that's less about hitting every culinary hot spot, and more about slow, interactive experiences.

Tourism companies around the globe are already tapping into the trend. Farm-to-Fork, a new Jordanian tourism project, is introducing cross-country culinary tours complete with olive farm visits and foraging trips. Meanwhile, UK travel startup Sorn offers rural food tours that include truffle hunting, oyster catching, and open-fire feasting. And over in China, urbanites are venturing to countryside communities, farms, and orchards to taste fresh produce and learn how it's grown. Central to this shift is a growing craving for nature-rich experiences. In fact, the global agritourism sector is set to grow by 11.3% to \$238.7 billion by 2027.<sup>43</sup> To attract future foodies, tourism players will need to think outside the four walls of a restaurant. Outdoor culinary experiences that immerse travelers in the sights, sounds, scents, and tastes of a destination are set to give fine dining a whole new meaning.



Drinking—another assumed vacation perk—is also getting a wellness reset. The sober travel sector is expected to grow by a whopping \$315 billion from 2020 to 2024,<sup>44</sup> and dry travel companies like Travel Sober, We Love Lucid, and Sober Outside are already seeing spikes in demand.<sup>45</sup> Beyond just adding mocktails to their menu, however, hospitality companies should be exploring more creative replacements for alcohol. Consider, for instance, experiences that help visitors let loose and de-stress without the hangover. As more travelers begin to steer clear of pre-flight cocktails and beachside beers, healthier forms of pleasure will be needed.

## \ WHAT IF...

"Indulgence" was less about stuffing yourself silly, and more about the pleasure of interactive culinary experiences?

WAY IN:

# EVIDENCE-BASED AMENITIES



*As wellness explodes, science will be the ultimate differentiator.*

People are fed up with needing a vacation to recover from their vacation. A world obsessed with wellness is packing its bags in pursuit of better health, and businesses are racing to win them over. Just look at how everything from walking pilgrimages, to scream therapy retreats, to meat-free buffets is suddenly being promoted as "wellness tourism." As every company puts on a wellness wrapper, science will separate the proven practices from the false promises.

As it stands now, science-backed treatments are primarily reserved for ultra-luxe wellness resorts. Upon arriving at the new Rakxa wellness retreat in Thailand, for example, guests take a series of DNA tests, epigenetics, gut microbiome testing, and inflammation analysis. But those tests and the personalized plans they come with will run up a price tag of 80,000 TBH (\$2,416) for just two nights. Other resorts are focusing their efforts on sleep—a 21st-century luxury we can't seem to get enough of. Rooms at the five-star Equinox Hotel in New York, for example, include a proprietary "sleep system" developed by a health-advisory panel. For around \$1,000 a night, Equinox guests can enjoy sound-blocking walls, temperature-regulating sheets, a total-blackout window system, and a minibar stocked with magnesium supplements. Meanwhile, Miami's premier Carillon Hotel recently invested in smart beds that track guests' quality of sleep. And over in London, the Cadogan Hotel now offers one-on-one consultations with a sleep-expert hypnotherapist.

For those of us who aren't spending thousands of dollars a night, however, better options are needed. Looking forward, the players that offer accessible yet evidence-based wellness amenities will attract the masses. And given how far personal health tech has come, not all practices will require one-to-one doctor attention. Imagine, for instance, if hotel guests were given a wearable upon arrival. By monitoring improvements in mood, stress levels, and sleep quality from the beginning to the end of their stay, hotels could not only prove their health benefits, but also send visitors home with personalized lifestyle tips. Similarly, what if outdoor tour companies leaned into the positive physiological effects of time spent in nature? Or, if airlines offered affordable health treatments to help people start their vacation off the right way?

As the pandemic pushes health concerns top of mind, unfounded wellness practices will no longer cut it. Tomorrow's travelers want to return home healthier, and they expect the science to prove it.

## \ WHAT IF...

Tourism boards commissioned doctors to curate itineraries proven to improve health?

# DESTINATION UNKNOWN

“WHEN YOU THINK OF LUXURY DESTINATIONS, YOU PROBABLY THINK OF PARIS, NEW YORK, MILAN, OR VENICE. HOWEVER, THE WEALTHY DON’T TEND TO CONSIDER THESE POPULAR TOURIST DESTINATIONS AS PLACES TO VACATION. THE WEALTHY TEND TO GO OFF THE BEATEN PATH AND SHACK UP IN PLACES THAT FEW TOURISTS HAVE EVER HEARD OF, LET ALONE VISITED.”

— Lux Life Magazine<sup>46</sup>



## TRAVEL HAS GONE MASS. WE'VE BEEN EVERYWHERE AND SEEN EVERYTHING, LEAVING FEW ROADS LEFT UNTRAVELED.

### CHEAP FLIGHTS FOR ALL

Flights have gotten cheaper over time, making frequent travel possible for the masses. In the U.S., the average domestic airline ticket cost \$248 in 1996. Twenty-five years later, the average domestic ticket costs just \$260.<sup>47</sup>

### #TRAVEL EXPLODES

As covered by Fast Company, social media has magnified travel temptations. "And then Instagram arrived, followed by selfie stick-wielding influencers who obsessively mapped the globe's most beautiful coves, peaks, villages, and beaches, inviting others to follow."<sup>48</sup>

### A WELL-TRAVELED WORLD

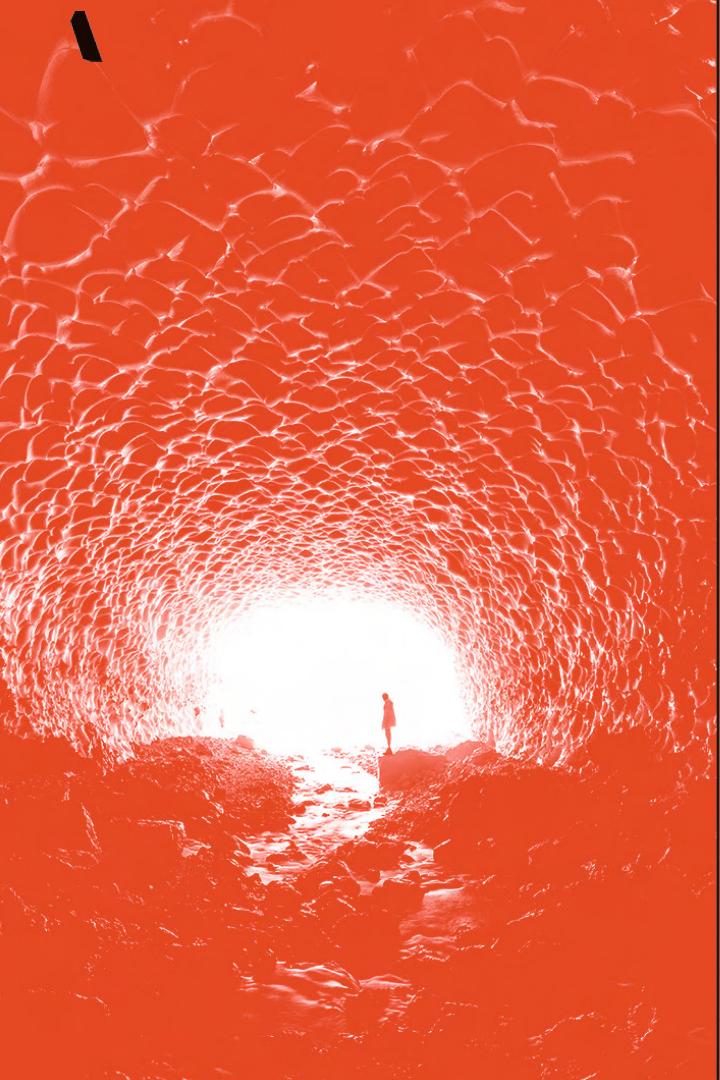
According to Agoda's 2019 "Well Traveled Survey", almost seven out of 10 people have visited up to 10 countries (68%), with travelers from United Arab Emirates (92%) and the Kingdom of Saudi Arabia (82%) in the lead, followed by Thailand (76%), Malaysia (75%) and Japan (71%).<sup>49</sup>

### SEE YOU THERE

The top 10 most popular destinations received 40% of all global tourist arrivals in 2018. France ranked #1 with 89 million annual visitors.<sup>50</sup>

### OVERLOADED LANDMARKS

The Taj Mahal receives more than 50,000 visitors a day.<sup>51</sup>



## A WORLD ENTHRALLED WITH THE UNKNOWN IS NOW SEEKING EXCITEMENT IN NEW PLACES.

### SPACE TRAVEL LIFTS OFF

Worldwide revenue from the orbital space travel and tourism market is forecast to reach roughly \$555 million by 2030.<sup>52</sup>

### DARK SKY TOURISM

A growing number of people are flocking to Dark Sky Preserves to stargaze far away from the city lights.<sup>53</sup>

### TRAVEL GETS GAMIFIED

When borders closed, Tourism New Zealand teamed up with Twitch to create a gamified walk-through of the country's landscape.

### UNTAPPED DESTINATIONS

A Google search for "secret travel spots" returns over 80,900,000 results.

### OBSCURE IS IN

Atlas Obscura, the travel site known for unique and obscure destinations, has continued to experience strong demand as people steer clear of mass-produced itineraries. The company secured \$20 million in a funding round led by Airbnb in 2019.<sup>54</sup>

THE PURSUIT OF  
*NEW FRONTIERS*  
WILL REDEFINE TRAVEL ASPIRATIONS.

WAY IN:

# HEDONISTIC ESCAPES

*A desire for escapism is driving an uptick in the unusual.*

When the all-white hotel room, cheerful family cruises, and zenned-out meditation retreats get old, where do you turn? For a growing number of people, the answer is toward the weird and whimsical. After over 18 months of monotony, travelers are looking to make up for lost time with experiences that fulfill their cravings for escapism, self-expression, and over-the-top amusement.

Recent Airbnb trends support this growing attraction to the unusual. The platform's most booked and wish-listed property is the Mushroom Dome—a tiny yet intriguing mushroom-shaped cabin in the middle of the California Redwoods. "Travelers are turning to unique abodes like cabins, tiny homes, and treehouses to break up the monotony of the past year, with the type of stay—not the exact location—becoming the destination," says an Airbnb spokesperson. The proof lies in the numbers, with Airbnb searches for "unique" properties—including hobbit holes, 12th-century castles, and potato houses—shooting up 94% during the first half of 2021 compared to the same period two years ago.<sup>55</sup>

The same shift is infusing magic back into travel itineraries. Earlier this year, luxury UK travel company Black Tomato launched a series of immersive holidays inspired by classic children's stories. The theatrical experiences ranged from a trip to Oxfordshire modeled after Alice's Adventures in Wonderland, to a Moroccan Arabian Nights-style adventure. The nostalgic getaways proved to be a popular escape from pandemic stress.



It's worth noting that for some, hedonistic escapes may conjure up images of dark tourism. While not new, dark tourism is certainly gaining fresh visibility, thanks to shows like Netflix's "Dark Tourism" series and HBO's "Chernobyl," which drew a 30% increase in visitors in 2019.<sup>56</sup> But not all crowds are good news. Dark tourism has been linked to dangerous health and safety risks, as well as voyeuristic visitor behavior. Behind the black curtain, however, lies a very fundamental human desire for thrill and novelty. So, how can tourism companies answer on our quest for intrepid experiences without the negative consequences?

We foresee a world where travel becomes increasingly thematic, imaginative, and unpredictable. For a glimpse into the future, look to Bill Bensley's luxury "human zoo" hotel concept. The property—opening in China in 2022—will act as a wildlife sanctuary, letting wild animals roam free while humans stay in cage-like rooms covering just 5% of the land. Looking forward, these types of eccentric experiences will give travelers something to write home about.

## \ WHAT IF...

Tourism boards created a series of thematic escapes?  
Making visitors active participants in a larger narrative.

WAY IN:

# ENDS OF THE EARTH

*For luxury travelers, the sky is no longer the limit.*

When it comes to travel, we've been there and done that. And if we haven't been there ourselves, we've already seen our friends document their visit via Instagram. Mass-produced travel bucket lists have brought us all to the same predictable places—overcrowding destinations while often underwhelming visitors. Now, after several months of going nowhere, people are desperate to feel alive again. And they're chasing that feeling all the way to the ends of the earth.

Going where few have been before is the new brag-worthy travel pursuit. Just ask Jeff Bezos, Elon Musk, and Richard Branson. The three billionaires have recently made (mostly controversial) headlines for chasing their space travel dreams, and their ambitions are catching on. New data from Ally Bank shows that Americans have started saving up for space travel—designating Ally funding buckets with names like "space vacations," "a trip to space," and "SpaceX."<sup>57</sup> And considering a three-night stay at the first space hotel will cost around \$5 million, it's never too soon to start saving.



Though space travel will be reserved for the ultra-rich for the foreseeable future, the same obsession with novelty is taking hold across the travel sector. This summer, for example, Airbnb and Volvic offered an exceptional €1 stay for two people in the heart of the Chaîne des Puys Volcanoes, a UNESCO World Heritage Site. As expected, reservations for the unique glass-enclosed mini-house filled up fast. For further proof, look to Antarctica's tourism boom. Over 56,000 tourists visited Antarctica during the 2018-2019 season, and the figure for the 2020-2021 season is expected to surpass 78,500—more than double the total from a decade ago.<sup>58</sup> So if even Antarctic travel is edging toward the mainstream, what's next?

Looking forward, our craving for excitement will bring us to the wildest, most unexpected parts of the planet. And though travelers with deep pockets will likely get there first, it's only a matter of time before others follow.

## \ WHAT IF...

The future must-visit travel destinations were at the ends of the earth? Think hovering hotels and glass huts on the ocean floor.

WAY IN:

# CREATE YOUR OWN ADVENTURE



*Extended reality will allow people to travel before they travel.*

When COVID-19 crushed our vacation dreams, it was virtual travel to the rescue. Desperate to be anywhere else, people stuck on their VR headsets, tuned into livestream travel cams, and participated in online tourism experiences from their living room. But as physical travel becomes possible again, it's safe to say that AR and VR won't be stealing flight sales anytime soon. What can be said, however, is that extended reality will put a fresh spin on tourism.

Besides the fact that you can't virtually taste Italian gelato, one major reason VR hasn't taken over travel is that the technology simply isn't there yet. "The headsets are expensive, heavy, can cause nausea, and aren't comfortable to wear for more than 30 minutes. The apps have none of these problems, but simply aren't as impressive," notes Ralph Hollister, a tourism analyst at Global Data.<sup>59</sup> What VR has done well, however, is get people excited about booking trips IRL. "We foresee VR videos becoming the ultimate tool for travel advisors. This is about creating a new kind of sizzle that will dramatically increase sales," says John C. Graham, President of Travel World VR.<sup>60</sup>

This "try before you buy" trend gives travel companies an opportunity to cash in on wanderlust before the trip even begins. Imagine educational AR or VR experiences that provide insight into a location's rich history, giving people a more compelling reason to visit. Or, for the less popular destinations, how can VR help prove that a place is actually worth the airline ticket?

Looking even further into the future, extended reality will allow us to see and do the impossible. Companies like Flyover Zone and Lithodomos are already unlocking time travel with virtual tours of heritage sites as they appeared thousands of years ago. And with Facebook actively investing billions to build the metaverse, it's not hard to consider how next-gen technology will eventually redefine what it means to travel altogether.

For instance, what if you could think up the vacation of your wildest dreams, enter it into a VR app, and send your avatar there within minutes? How about virtually traveling to one of the world's most endangered destinations, then learning how you can help protect it in real life? Or, driving pre- and post-trip engagement via gamified virtual travel experiences? When technology makes it possible to create your own adventure, nothing will be off limits.

## \ WHAT IF...

VR optimized trip planning? Opening people's mind to destinations and experiences they would have never otherwise considered.

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# APPENDIX

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# EDGES SHAPING THE FUTURE OF TRAVEL



Human emotions are being analyzed and optimized in entirely new ways. As feelings turn scientific, a modern wave of mood-boosting products are promising to make us calmer, happier, or even euphoric. Serotonin supplements can cure your sadness. CBD bath bombs relieve stress. And emotion-monitoring wearables help you make sense of how you feel. The market for mood modulation is booming.



Globalization's fall from grace is allowing us to rediscover our roots. While being worldly was once a point of pride, we're now turning inward and getting in touch with our local and national heritage—gaining new appreciation for the people, land, and traditions that came before us. To know who we are, we must start by celebrating where we came from.



The doom boom is upon us. Political instability, climate change, and a global health crisis are fueling the multimillion-dollar disaster prep industry. Emergency kits and wildfire insurance offer peace of mind for the everyday, while intensified interest in private islands and extreme survival fitness courses point to a growing prepper mentality. As we face our dystopian future, we'll look to brands that help us beat the odds.



Frugality is becoming ubiquitous. Whether it's Millennials' conspicuous passion for thrifting, or Gen Z's virtuous sobriety, a growing wave of people are turning their backs on the consumerism trap that filled their drawers and emptied their bank accounts. Simple living is no longer considered a sacrifice. It's the smart choice for our wallets, our well-being, and our planet.

# EDGES SHAPING THE FUTURE OF TRAVEL



AI is getting personal. What started as a mass movement to make over entire industries is transforming into a tool for individual improvement. A new wave of AI innovations are promising to make us smarter, strengthen our relationships, and guide our daily decisions. But as ethical concerns push us to audit the role of algorithms in our lives, we'll start separating the practical applications from the emotional. It's time to hold AI accountable.



The data rush is underway—and corporate giants and consumers are in fierce competition to get their share. Savvy users are starting to trade their data for currency. And tech giants are banking on data mining as the path to prosperity. As data becomes a prized asset, we'll see the end of unchecked data grabs and vague permissions, and the start of a more formal data exchange economy.



It's the era of shared despair. From climate change to class, race, and gender warfare, modern consciousness birthed infinite issues for us to care about—and now we have anxiety about all of them. As the pandemic compounds our concerns and the worldwide mental health crisis deepens, every brand will be in the business of helping us cope with the chaos. We're collectively confronting our stress with zero shame.



We're combating the chaos with pure absurdism. Cringe comedy, memes about existential dread, and nihilistic humor are serving as modern-day coping mechanisms for a generation that's disillusioned with the world. Alternative forms of art and culture will emerge from the darkness—offering welcome diversions and lighthearted healing.

# EDGES SHAPING THE FUTURE OF TRAVEL



Health and wellness are converging. A once-sterile healthcare industry is taking cues from the pleasurable parts of wellness, ushering in a more holistic and hyper-personalized approach to medical care. From hospitals that feel like luxury hotels, to at-home test kits that offer exciting insights into our biology, healthcare is going from dreaded to embraced. Who says the journey to better health can't be enjoyable?



An uptight world is ready to loosen up. Society is turning its back on impossible standards around one-note beauty, buttoned-up professionalism, and picture-perfect lifestyles— ushering in a new, unapologetic attitude. We're breaking free of unrealistic expectations by shamelessly indulging in life's pleasures and flaunting our flaws. Aspiring to perfection is outdated.



Demand for work-life boundaries is the new employee uprising. COVID-19 killed the office, dissolving the lines between work and home along the way. And a burnt-out workforce is becoming dissatisfied with business as usual. Achieving balance will become the new ambition as we aim to put always-on work culture back in its 9-to-5 box. The jobs that put life first will attract the talent of tomorrow.



The physical world is turning to vapor. We're entering a new era of on/off-line blur where celebrity holograms are headlining music festivals. Where we're outfitting our avatars in the latest fashion. And where a larger portion of our paycheck is going toward digital goods. As the division between virtual and IRL is broken down, we'll redefine the "real world" far beyond what's tangible.

# EDGES SHAPING THE FUTURE OF TRAVEL



It's time to welcome back the wild. Science is waking us up to the fact that restoring biodiversity is essential to our survival, and we all have a role to play. Governments are expanding green spaces. Individuals are keeping backyard beehives and learning to forage for food. And global players are working to reintroduce lost species. We're letting nature reclaim its place in our world.



The pandemic pause forced a mass reappraisal of how we get from A to B. Mobility considerations are moving beyond comfort and convenience as we collectively question the effect transportation has on our health, our planet, and societal well-being. From EV incentives to hyperlocal travel—policy makers, passengers, and brands are betting on mobility to make the world right again.



A waste-not world is giving physical spaces a second life. COVID-19 has emptied offices and storefronts, accelerating the transformation of urban environments. Think co-living communities that combine work, school, and family life; sharing services that make the most of vacant spaces; and hotels that double as virtual schooling hubs. As we rethink the role of physical space, businesses will remix their real estate for round-the-clock purpose and profit.