



The Future Travellers

The way we travel is changing. From the rise of 'medi-luxe' to a growing insistence on regenerative and socially responsible experiences, new needs and motivations are emerging. In this report, created in collaboration with Soneva, we examine the key trends that will shape the future of luxury travel. We also profile five personas, revealing their shifting priorities and how these will be met by the industry

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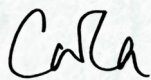
+  *Soneva*

If one silver lining has emerged from the Covid-19 pandemic, it's a **renewed sense of purpose**. For many of us, **the crisis has been a catalyst to re-evaluate what matters, who matters, and what we want our future to look like** – with this new focus offering a route out of the stress, anxiety and disorientation of the past three years.

A new determination to live with intent will inform consumers' travel choices, imbuing their time spent away with a greater significance and causing them, perhaps, to travel less but travel wiser. And as the desire for meaningful engagement – with people, places or experiences – resurfaces to compensate for the isolation of the pandemic, our reasons for travelling will ultimately demand as much consideration as our destinations.

This report – compiled in collaboration with Soneva, creators of award-winning sustainable resorts in the Maldives and Thailand, and pioneers of “barefoot luxury” – outlines how a new “make every moment count” mindset will affect the global travel industry, while exploring the concerns and convictions that will propel future travellers.

Starting with a macro analysis of global shifts, not just in travel but in lifestyle as a whole, it presents five key trends that will influence the industry over the next two to three years. These are followed by profiles of five travel consumers, identifying their priorities, values and ultimate travel needs.



Carla Buzasi,
President & CEO, WGSN

About WGSN

WGSN is the world's leading trend forecaster. We're the ones leading the way, tracking the new and what's next. We're the experts behind the people who create the clothes you wear, the furniture in your home, the devices connecting you, the milk in your coffee, the lotion on your skin, the hotels you visit, the experiences you remember.

Our team of forecasters and data scientists constantly track the signals of change that influence how people will think, feel and behave, shaping how they live, work and play. We forecast the trends driving change in the world, to help the world's leading brands – from startups to Fortune 500 companies – create the products and experiences you will want for years to come.

We help the world navigate change, so we all can create a better future.

About Soneva

Founded by husband and wife Sonu Shivdasani and Eva Malmström Shivdasani, Soneva was the first barefoot luxury resort of its kind, setting the blueprint for sustainable tourism in the Maldives with the opening of Soneva Fushi in 1995. Today, Soneva's family of resorts includes three trailblazing properties, Soneva Fushi, Soneva Jani and Soneva Kiri, and an ultra-luxurious yacht, Soneva in Aqua. Each outpost is a one-off, but all channel Soneva's signature SLOW LIFE philosophy, because at Soneva true "luxury" is defined by peace, time and space. Each day, guests are encouraged to reconnect with themselves and the natural world through rare, unforgettable experiences that inspire and enthrall.

Soneva is a pioneer for responsible tourism, combining a conscientious, proactive approach to sustainability with exquisite luxury and intuitive personalised service. Carbon neutral since 2012, Soneva launched its Total Impact Assessment in 2016, a first for the hospitality industry, measuring its social and environmental impacts.

In the UK New Year Honours 2023 Overseas and International List, Sonu Shivdasani was honoured as an Officer of the Order of the British Empire (OBE) for services to tourism, sustainability and charity.



Now,
voyager

How has the travel industry been impacted by the events of the past three years?



Have bags, **will travel**

Despite rising fuel prices, inflation, flight cancellations, staff shortages and strike action, consumers are still prioritising travel, whether it's to make up for lost family time during the pandemic or simply to get out and experience the world.

Ready **for action**

Active travel and outdoor adventure are already playing a significant role in the travel industry's recovery. Future outdoor tourism will dial up the thrills even more, with trips designed to check off the wildest of bucket lists.

Travel **wise**

Travel brands and regional governments are increasingly prioritising sustainable, regenerative and socially responsible experiences for consumers, while championing local and indigenous history.

The bleisure **principle**

Historically, travel has been separated into business or pleasure, but the rise of bleisure travel represents an exciting opportunity for consumers and the travel industry, as work-life boundaries continue to blur.

Extended **stays**

The growth of bleisure will see travellers opting to spend longer away. According to Amex Travel's 2022 Global Travel Trend Report, 55% of Americans say they are willing to take longer trips this year because they can work remotely.

Macro Trends

A changing world

Five global lifestyle shifts that will influence the travel consumers of the future

- 01 Future Shock
- 02 Call of the Wild
- 03 Regenerative Imperative
- 04 Wellness 2.0
- 05 Intentional Living

Macro Trends 01

Future Shock

What

Coined by futurists Alvin Toffler and Adelaide Farrell in their 1970 book of the same name, Future Shock refers to the social and emotional paralysis triggered by the “shattering stress and disorientation” of the magnitude and velocity of changes in society. The multiple crises of the past three years have led to greater apprehension about the future, with desensitisation – a feeling of numbness – emerging as a defence mechanism against emotional fatigue. Overstimulation, sensory overload and fear of life returning to the way it was before the advent of the Covid-19 crisis are also combining to induce an overwhelming sense of anxiety.

Why

An overload of stimulus driven by constant connectivity is one of the key contributors to a widespread sense of malaise. Sensory historian Mark Smith argues that the pandemic has triggered a “sensory revolution”, whereby isolation and changing work patterns have rapidly shifted the way we use our senses to navigate the world. Touch is absent, while other sensory elements such as noise and artificial light seem harder to deal with following lockdowns. This rapid change, which would usually occur over decades or centuries, is driving overstimulation. As this grows, so too does sensory overload, which is when the brain receives more input than it can process.

In an Ipsos and World Economic Forum survey that sampled more than 21,000 adults from 27 countries, 86% of adults agreed with the statement “I want the world to change significantly and become more sustainable and equitable rather than returning to how it was before Covid-19.” FoNo (fear of normal) is another source of anxiety. It describes the feeling of not wanting to regress – the worry that striving to return to the old normal will result in the continuation of old oppressive mechanisms such as pay and gender inequality, racial disparity and unsustainability.



How

“The importance of mental and emotional hygiene will hit mass awareness in 2023,” says Andrea Bell, VP of Consumer Insight, WGSN. “Following the crisis in mental health that has arisen during the pandemic, we will see new solutions for dealing with stress, anxiety, insomnia and disconnection.”

These will include a growing movement towards self-prioritisation, as consumers are encouraged to focus on their individual wellness and take stock of what allows them to operate at their highest potential. On an everyday basis, they will focus on the positive, on seeking small moments of joy that provide pleasure and satisfaction. Pursuing trends such as the #100DaysOfHappiness, they will take time to appreciate the present. Enlightened disconnection – routines that support off-hour lifestyles or intentional inactivity – will emerge as a key coping strategy. Safe psychedelic experiences, notably involving micro-doses of psilocybin, are also gaining widespread acceptance.

Travel, offering as it does the chance to **make profound human connections, take stock and gain wisdom**, will emerge as a potent way to counterbalance our always-on, overstimulated lives.

Travel impact

As Karen Cassiday, managing director of the Anxiety Treatment Center in Chicago, USA, says: “If we become psychologically wise from the pandemic experience, we will build more opportunities for daily face-to-face interactions and forgo the idea of a largely virtual life, because our physical interactions with other people affirm our existence, our humanity and our interdependence on one another.”

Travellers will re-evaluate their travel goals to focus more on enlightened detachment and meaningful engagement. All Soneva resorts, for example, have dedicated no-wifi zones, encouraging guests to fully engage with each moment. “Our ‘No News, No Shoes’ philosophy is all about disconnecting from the stresses of daily life and reconnecting with the earth, with the sand between your toes,” says Dr Lilly-Marie Blecher, Soneva’s chief science and medical officer. “No screens are visible in our villas, and the wi-fi has a kill switch. Our clocks are also set one hour ahead, allowing the guests’ circadian rhythms to match the natural hours of day and night – and we keep our lighting low to offer the best views of the night skies.”

See: New Romantics; Wisdom Seekers; Virtuous Voyagers

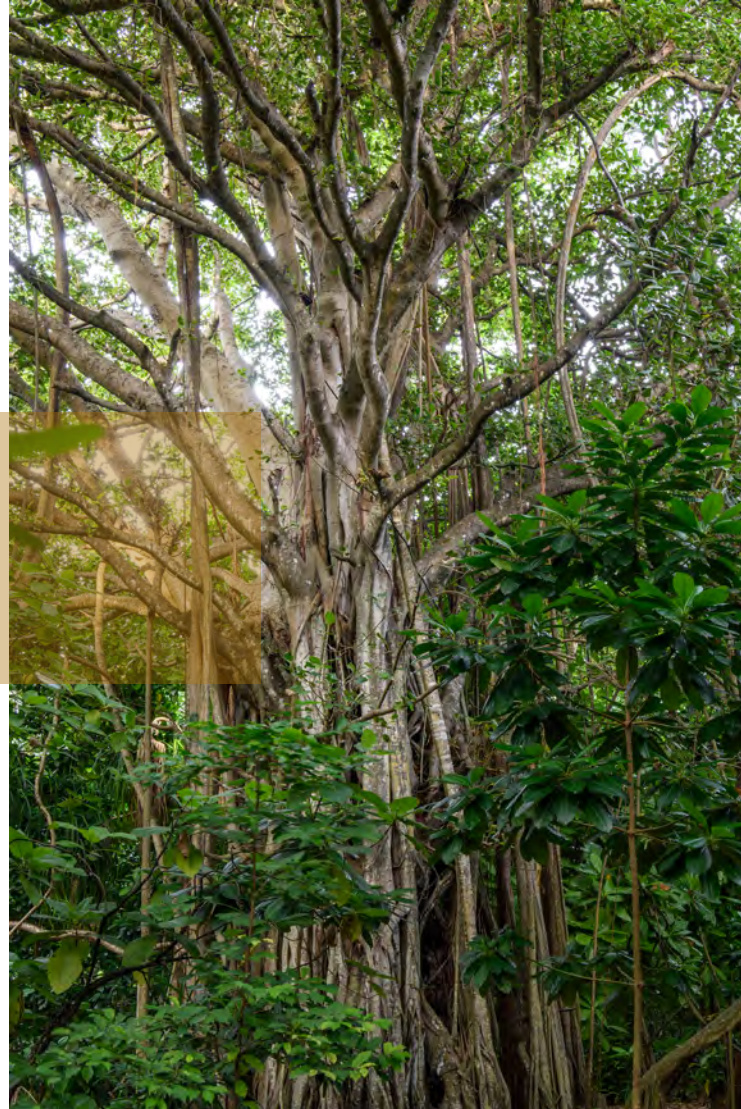


“ Following the crisis in mental health that has arisen during the pandemic, we will see new solutions for dealing with stress, anxiety, insomnia and disconnection”

Andrea Bell, VP of Consumer Insight, WGSN

Macro Trends 02

Call of the Wild



What

With many people restricted to one short walk a day – or less – during lockdown, contact with the natural world became a cherished commodity. Outdoor pursuits such as hiking and gardening emerged as therapeutic counterbalances to always-on hustle culture and social media burnout. This was seized upon in particular by younger people, with the UK's Royal Horticultural Society noting a 533% increase in the number of 18 to 24-year-olds visiting its website during the pandemic.

Why

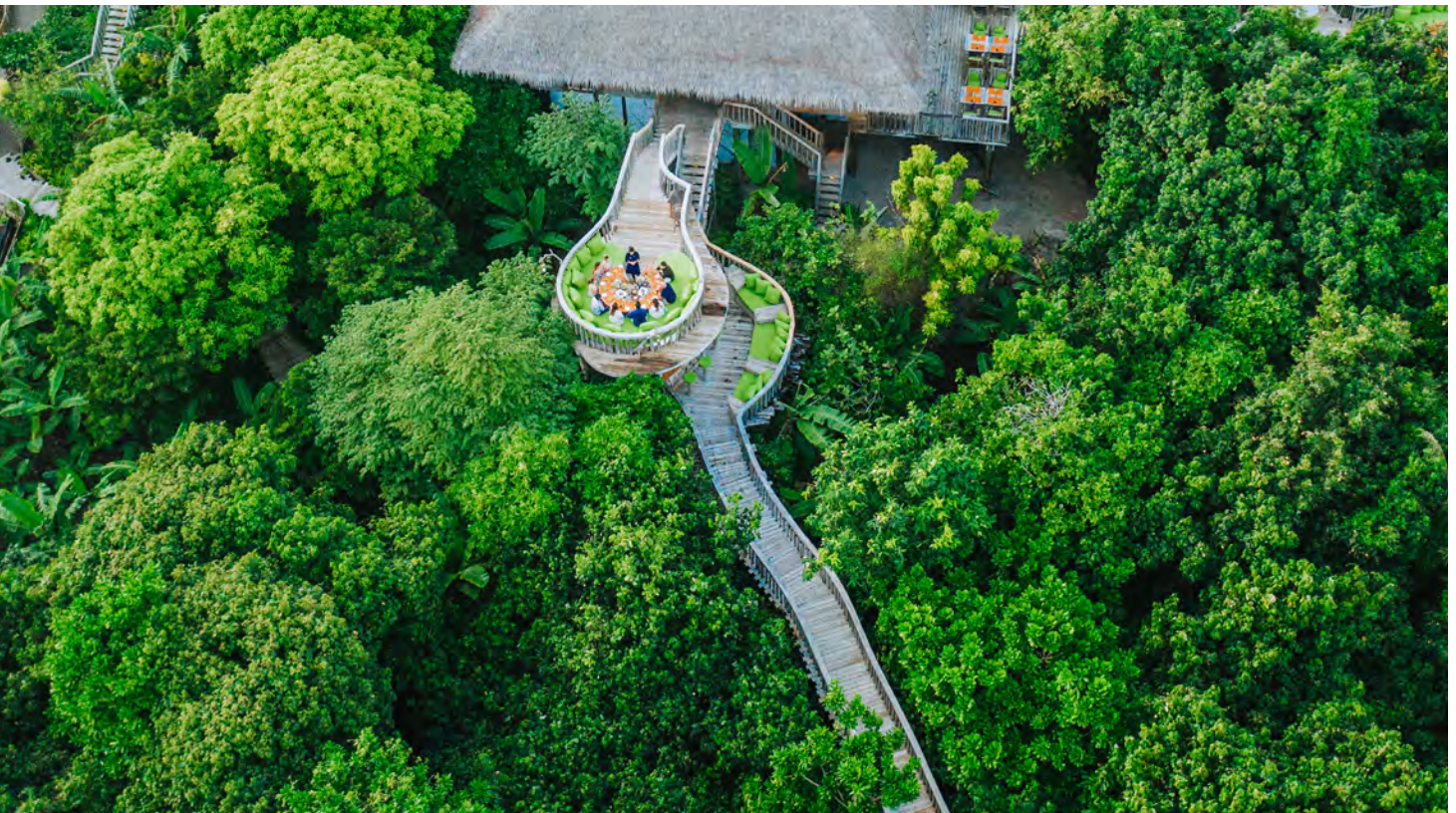
The Call of the Wild taps into a core belief that immersion in nature offers an antidote to the ills of post-pandemic life. Engaging with rural environments is seen as nourishing and beneficial for our mental health. It can take the form of sporting activities, outdoor pursuits or even forest bathing – an evolution of the Japan psychological exercise *shinrin-yoku*, loosely translated as “taking in the forest atmosphere”.

And it's not just theoretical. Research continues to show a link between spending time in nature and emotional wellbeing. In one study, the Department of Neuroscience at the Max Planck Institute for Empirical Aesthetics in Frankfurt am Main, Germany, monitored 24 subjects as they watched a series of videos of natural landscapes, scanning their responses using functional magnetic resonance imaging (fMRI). They reported continuous ratings of enjoyment. As the study's authors wrote in their introduction, “Interactions with the natural environment can be highly impactful and aesthetically rewarding. Natural landscapes are rich sources of beauty, pleasure, awe and fascination.”

How

The use of the word “awe” here is telling. When it comes to nurturing mental health, the concept of awe is emerging as a key resource. In a study carried out by the Applied Technology for Neuropsychology Lab in Milan, Italy, daily awe experiences – ranging from time spent in nature, known as an “awe walk”, to listening to new music – were found to reduce depression.

The great outdoors provides low-footprint, high-reward activities designed to heal, furnish us with moments of awe and propel us towards our greatest potential. The latter point is touched upon in a 2019 National Geographic article, *Your Brain on Nature*. It highlights research by David Strayer, a cognitive psychologist at the University of Utah, who has discovered that Outward Bound participants perform 50% better on creative problem-solving tasks after three days of wilderness backpacking. Our brains, Strayer says, “are easily fatigued. When we slow down, stop the busywork, and take in beautiful natural surroundings, not only do we feel restored, but our mental performance improves too.”



Travel impact

The move outdoors has been building momentum since 2020, when people across the globe began seeking their own versions of *friluftsliv* – the Nordic concept of ‘free-air life’. “Friluftsliv can range from solo meditation to picnicking or hiking with friends,” says Joe McDonnell, Director of Insight, WGSN. “Through participation in friluftsliv, people have reported improvements in their mental health as well as maintaining or creating more stable interpersonal relationships.”

“At Soneva we have always been inspired by nature – its majesty, magnitude and mystery,” says Sonu Shivdasani OBE, Soneva’s founder and CEO. “Nature is awe-inspiring, and I believe that its beauty is an important contributor to one’s overall wellbeing. Our goal at Soneva has always been to create a sustainable, natural environment for our guests to enjoy. At the heart of this is our ‘slow life’ ethos, which is the guiding principle for all of our Hosts and our operations. It is our moral compass as well as our operating compass.”

The pursuit of awe and the desire to commune with nature is also driving growth in active tourism. From 2019 to 2022, San Francisco-based travel company Viator saw a dramatic increase in bookings for outdoor activities. Adventurous experiences, including water sports, sailing and glamping (+311%, +122% and +500% respectively, according to Viator), are projected by the World Bank to be the most important sector for travel industry recovery.

See: New Romantics

“ Nature is awe-inspiring, and I believe that its beauty is an important contributor to one’s overall wellbeing”

Sonu Shivdasani OBE, founder and CEO, Soneva

Macro Trends 03

Regenerative Imperative

What

The climate emergency is pushing people to demand that businesses and governments actively promote change, with products and services that preserve the planet for all species. Consumers are now choosing agency over passivity, buying into businesses whose values and processes acknowledge the challenges of sustainability and make an effort to address them. Progressive companies will increasingly collaborate with local experts and utilise their wisdom, combining a Western and indigenous approach.

Why

Catastrophes such as droughts, flash floods and wildfires are reshaping the way we interact with our surroundings. Extreme climate events have altered consumers' understanding of sustainability, with a threat that was once viewed as conceptual now wreaking visible and lasting damage across the globe. As a consequence, sustainability has shifted from a lifestyle choice to a consumer demand.



How

In 2024, in a bid to tackle the monumental challenge of the climate emergency, we will see the emergence of protopias – a term coined by futurist Kevin Kelly to describe a more pragmatic aspiration than utopias, rooted in incremental steps towards progress. As Lisa White, Director of Interiors, WGSN, explains, “Multi-species thinking will put all of nature, not just humans, at the centre of design, and regenerative practices will gain momentum. Indigenous communities will be recognised as pioneers of circular systems and resource wisdom, and innovators will find middle ground between new technologies and lo-TEK (Traditional Ecological Knowledge) design.”

For businesses, the motivation to adopt circular systems will not only come from customers. Investors will also increasingly demand planet-positive strategies, and EPR (Extended Producer Responsibility) laws could require manufacturers to mitigate the environmental impact of their products throughout their entire lifecycle.

Travel impact

The desire for travel to reduce its environmental impact is becoming a key concern across the globe. A survey conducted by IHG Hotels & Resorts polling consumers in the US, UK, Germany, Greater China, the UAE and Australia found that 60% of respondents agreed that they want to be more environmentally and socially conscious in their travels. New frameworks are already emerging to conserve natural resources and protect them from overtourism, by tapping into the wisdom of the indigenous people who know their country best.

Boosting indigenous representation not only benefits local communities, it also caters to a growing demand from travellers for authentic, responsible tourism. Australia's Daintree Rainforest, for example, provides a key example of the way indigenous control can encourage a less destructive form of travel. The Eastern Kuku Yalanji people now manage their ancestral homeland in partnership with the Queensland state government and are re-shaping the way visitors interact with it.

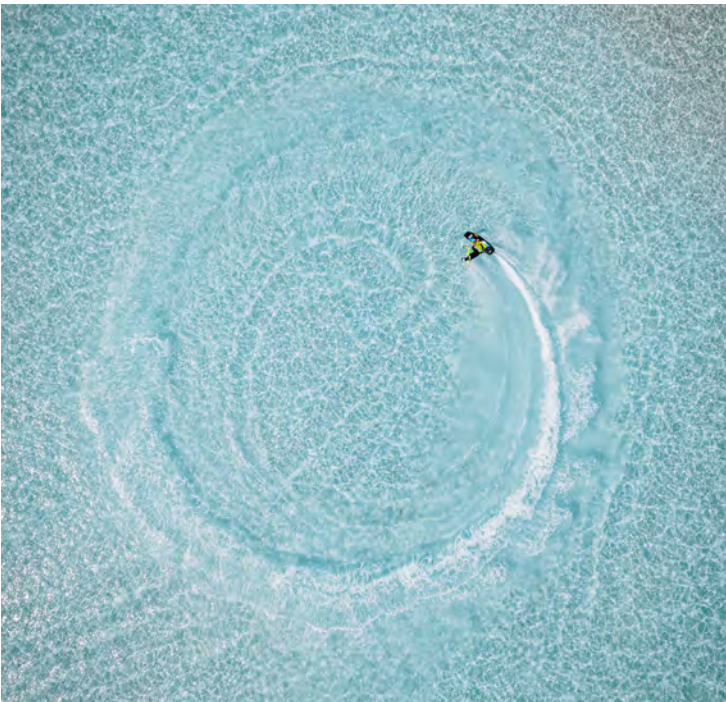
In the coming years, enlightened tourism will inspire a new generation of travellers looking to become dynamic contributors to their destinations – whether by reviving local communities or leaving regenerative roots afterwards. For while sustainable tourism aims to minimise damage to a location, regenerative travel strives to improve it for future generations.

Soneva's NGO, Soneva Namoonaa, works to empower zero waste communities across the Maldives. Namoonaa means 'exemplary' in Dhivehi, the language of the Maldives. In partnership with local island communities in the Maldives, it provides funding, expertise and coordination for a waste management system that cleans up local islands and demonstrates how single-use plastic bottles can eventually be phased out.

At the heart of the initiative is Soneva Water, located in Maalhos and rolled out to the neighbouring islands. Soneva Water provides an alternative to drinking water in single-use plastic with pure, filtered water in reusable glass bottles.

Soneva Namoonaa is also nurturing the next generation of ocean stewards through watersports, education and festivities. So far, Soneva Namoonaa's achievements have included diverting 286,104kg of recyclables from landfill or toxic open burning, delivering them instead to recycling partners, and improving the swimming skills of 750 young people through the Inspire Swimming Programme, with 26 new swimming instructors receiving training.

See: Virtuous Voyagers; New Romantics; Epicurean Adventurers



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Lisa White, *Director of Interiors, WGSN*

Macro Trends 04

Wellness 2.0

What

One of WGSN's Big Ideas for 2024 is "care-taking". Clare Varga, WGSN's Director of Beauty, outlines how this might manifest itself: "As we wave goodbye to hustle culture and say hello to self-care, products and experiences that help people live their best, most balanced life will come to the fore. In our search for new ways to counteract the ills – mental and physical – caused or deepened by the pandemic, innovative solutions that combine ancient wisdom with contemporary practices will emerge, establishing a new form of healing."

Traditional life achievement timelines will also be revised, with a person's age no longer seen as a rigid checkpoint. New research into anti-ageing vaccines and life prolongment will make age little more than a number. A silver generation of consumers is now embracing activity, experimental wellness and online connection, while 70% of Boomers and Millennials agree that "age is more a matter of mindset than physical abilities".

Why

The pandemic has inspired consumers to focus on their overall health, including nutrition, sleep and mental wellbeing. According to McKinsey, in Brazil, 74.1% of consumers are prioritising their health more than they did two to three years ago, along with 66.6% in China, 53.1% in the UK and 48.2% in the US. The process of healing both body and mind will continue to capture the consumer mindset over the coming years.

At the same time, factors such as the US opioid crisis, together with global concerns surrounding sustainability and wellness whitewashing, is pushing consumers to explore natural, ancient remedies.



Ancestral healing practices will be adapted for the modern age, making them more accessible than ever. Soul science – spirituality acting as medicine – will also gain traction.

How

Thanks to the growing popularity of ancient wellness rituals, bath houses and communal bathing spas are becoming the new go-to destinations. The pandemic's focus on self-care meant that many consumers were already spending more time in their bathrooms, but bathhouses such as Australia's Soak or Mexico's Mayan Clay Spa transform these rituals into communal experiences. At Melbourne's Sense of Self Bathhouse, spa facilities are filled with plants and bathed with light to add to the feeling of zen.

With a saturated market filled with false claims, miracle creams and other 'snake oils', consumers are leaning towards ancient techniques and natural ingredients. Pre-anthropocene practices such as Indian holistic healing system Ayurveda and traditional Chinese medicine are providing inspiration for preventative services and products, while also putting Chinese and South Asian entrepreneurs at the forefront.

Travel impact

The modern wellness consumer will regard travel as a natural extension to their list of self-care rituals, and look to holiday destinations to provide much more than simply relaxation. “Health is one of the biggest challenges facing the world right now,” says Shivdasani. “People are becoming more unwell, because they’re stressed, they’re exhausted, and they’re exposed to more pollution, whether it’s environmental or in the food they eat. All of this is impacting on their wellbeing and their ability to stay healthy. Unfortunately our current healthcare system is not concerned with getting to the root cause of the problem, it’s all about treating the symptoms. So if you have a headache, you take an aspirin. If you have severe back pain, you take strong painkilling drugs that are potentially addictive.”

Shivdasani believes the answer lies in drawing from ancient forms of medicine as well as cutting-edge modern treatments, a philosophy Soneva has espoused throughout its 27-year history. “I believe we can solve a lot of the health problems and chronic illnesses that face us in the 21st century just by changing the way we live and embracing alternative forms of treatment,” he says. “People are stuck on this hamster wheel of the current wellness system, which doesn’t really allow them to make use of thousands of years of traditional remedies. They feel lost. They don’t have access to the different health opportunities that are out there. At our resorts, our goal is to open people’s eyes to what is available.”

See: Wisdom Seekers; Epicurean Adventurers



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Sonu Shivdasani OBE, *founder and CEO, Soneva*

Macro Trends 05

Intentional Living

What

‘Living with intent’ will be a key lifestyle shift over the next few years. This concept is already exerting an influence on consumers, who are seeking a less materialist existence and striving to make every day count. From manifesting to romanticising your life – relishing simple daily moments – a new focus on intentional living will continue to shape the way people spend their time and their money, especially when it comes to eating, drinking and wellness habits.

Why

The pandemic has cast a long shadow and inspired us to reassess our priorities – leading to an increased focus on leisure and cultural reconnection. Small moments of mindfulness and intentionalism are a key aspect of this new philosophy, as we see in the “romanticise your life” hashtag, which encourages individuals to appreciate simple pleasures. Originally part of the cottagecore aesthetic, it has since evolved into a wider social media lifestyle trend, with more than 578.5m views on TikTok and more than 36,000 tags on Instagram. What makes “romanticise your life” so accessible is that it doesn’t focus on material possessions but rather on the manner in which everyday events – however mundane – are presented. Creators relish moments such as steam rising out of a cup of coffee, a nicely plated-up meal or neatly folded laundry.



How

Doses of intentionalism can involve anything from tea or cacao ceremonies to mindful moments of daily self-care such as bathing and beauty rituals. Jennifer Creevy, Director of Food & Drink, WGSN, notes that “cacao rituals are becoming popular, popping up everywhere from spas to sound baths and even Glastonbury Festival. UK-based wellness brand The Rising Space offers private rituals in a client’s home or at a private studio, serving cacao ‘brewed and infused with intention.’”

The ancient tradition of tea preparation, meanwhile, is appealing to a new generation of young people in China. In Chengdu, Proper Tea offers *gongfu*-style tea in a relaxing atmosphere and hosts live tutorials on *gongfu* tea ceremonies. There is also new local interest in *dian cha*, a traditional tea preparation method that inspired Japan’s matcha tea ceremony. For brands outside China, this trend has the momentum to go global. Community-based teahouse and tea-driven cocktail lounges are reframing drinking culture with a focus on time spent talking and connecting with friends rather than partying.

Consumers will also think more deeply about their choices and actions, **weighing up the potential impact** not only on their own individual wellbeing but also **on the welfare of the planet.**



Travel impact

As intentional living moves further into the mainstream, travel will be approached in a more considered and responsible way. There are myriad applications of intentional living to be found within the spa and wellness sector, with some consumers looking to ancient wellness, including bathing and beauty rituals, as a means of achieving daily intentionalism. Consumers will also think more deeply about their choices and actions, weighing up the potential impact not only on their own individual wellbeing but also on the welfare of the planet.

Dr Blecher confirms that Soneva's guests are increasingly expressing an interest in intentional living and enhanced mindfulness, seeking "enlightening experiences that illuminate and enrich their lives while treading lightly on the Earth". At Soneva resorts, this can be achieved in a variety of ways, from experiential fitness, yoga and Pilates sessions conducted in outdoor gyms and yoga champas – reinforcing the spiritual and physical connection – to spa rituals and massages that incorporate breathwork and meditation.

"Throughout our resorts we provide contemplative spaces and opportunities for meditative experiences," says Dr Blecher, adding that daily intentionalism becomes almost second nature for Soneva's guests: "By following a new wellness routine every day, we establish deep, healthy habits: morning yoga, fresh juices, smoothies and food from our farms, followed by water sports or creative activities; lunch, then afternoon Ayurvedic consultation, acupuncture or other traditional treatments; slow dinner with your family, stargazing on the beach, reading and self-care. The natural rhythms of life at Soneva resorts inspire intentional living."

See: Wisdom Seekers; Epicurean Adventurers; Virtuous Voyagers

“Cacao rituals are becoming popular, popping up everywhere from spas to sound baths and even Glastonbury Festival”

Jennifer Creevy, *Director of Food & Drink, WGSN*

Future Travel Consumer Profiles

Future travellers

How will global lifestyle shifts inform the needs of travellers over the next two to three years? Here, we profile five personas, revealing their changing priorities and how these will be met by the travel industry

- 01 The New Romantics
- 02 The Epicurean Adventurers
- 03 The Global Citizens
- 04 The Wisdom Seekers
- 05 The Virtuous Voyagers

Future travel consumer profile 01

The New Romantics

The New Romantics are fuelled by a deep need to reconnect with their emotions. In spirit, they can be compared with the Romanticism movement in arts and literature that emerged in the West in the 1800s, but whereas Romanticism embraced utopian ideals of life, nature and community, **New Romantics are more rooted in practicality and pragmatism.**

Awestruck

Emerging from a prolonged period of disconnection and introspection, the New Romantics are hungry for sensorial fulfilment. Both at home and on their travels, they seek transcendental, authentic experiences, immersion in natural surroundings and moments of awe. University of Michigan psychologist Ethan Kross defines awe as “the wonder we feel when we encounter something powerful that we can’t easily explain”. A mix of both fear and wonder, it is an emotion that has been shelved in recent years as people traded awe-inspiring moments for stability, survival and certainty.

Awe brings people together and leaves them feeling inspired. As a collective emotion, it helps the self to shrink and the world to expand. According to Yang Bai, researcher at University of California, Berkeley, “While we’re feeling small in an awe moment, we are feeling connected to more people or feeling closer to others. That’s awe’s purpose, or at least one of its purposes.”

“The last 30 to 40 years has seen a major shift in the demographics of the wealthy,” says Shivdasani. “They live in cities, where pollution is present in all its forms: unclean environments, noise and light. They are not as in touch with nature, they hardly have time to sit down and take a breath, let alone spend large amounts of quality time with their family and friends. With this in mind, the experience we have created for our guests is as far removed from an urban scenario as possible, letting them indulge in things they rarely get to do in their daily lives.”

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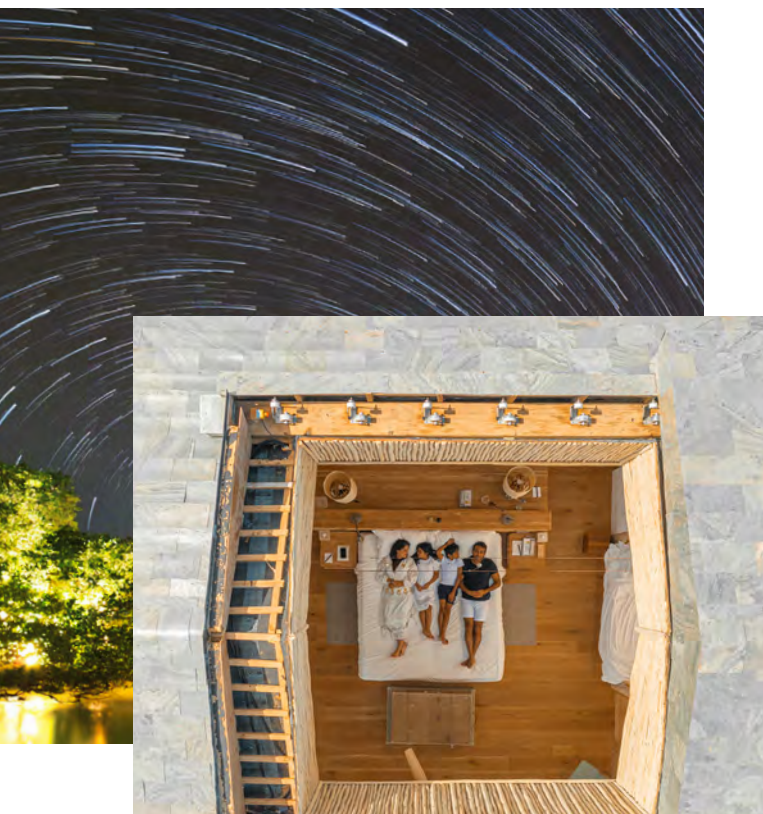
Force of nature

Chiming with other contemporary concerns such as intentionalism and mindfulness, daily doses of awe help us to savour life, an urge that is especially potent in a travel context. Whether it's surveying a beautiful landscape or encountering wildlife, it often feels like time stands still during moments of awe – and a study by psychologists at Stanford University and the University of Minnesota found that these can have lasting beneficial effects. Melanie Rudd, co-author of the Stanford study, says: “Experiencing awe heightens people's focus on the present. When you are more conscious of the present moment, you feel that your experiences are fuller, that more can happen or be accomplished during a period of time.”

In their quest for moments of awe, the New Romantics are drawn to experiences that offer journeys reconnecting them with nature, with themselves and with the shared human experience. The travel industry is already responding to their desires and aspirations. Rather than talking up their luxury touchpoints, elite hospitality destinations are concentrating their efforts on promoting wellbeing and personal growth.

Soneva's guests have myriad opportunities to immerse themselves in the natural world: guided snorkelling expeditions; swimming with hundreds of manta rays; joining “turtle on call” patrols to monitor nesting turtles; sunset dolphin cruises; or simply walking barefoot on the sand and grounding oneself with the earth.

Soneva has also introduced a range of initiatives aimed at helping younger guests connect with nature. “With Soneva Fushi Wildlife Explorer, children are presented with bingo cards featuring indigenous plants and animals,” says Ritu Mathur, area permaculturist, Soneva Fushi and Soneva Jani. “They can then explore the island trying to find all the flora and fauna they see on the cards.”



Psychedelic solutions

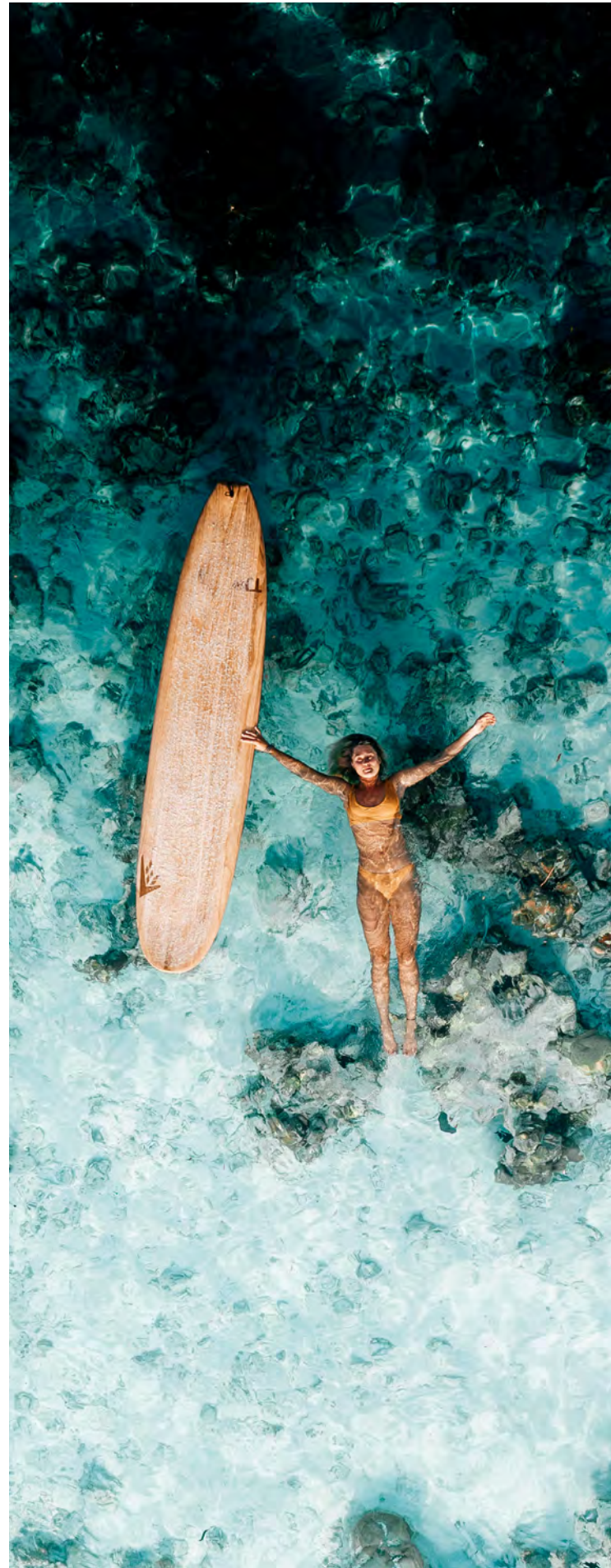
In the US, the depression rate jumped from 8.5% pre-pandemic to 27.8% in 2020. Consumers and healthcare providers alike are exploring alternative therapies, including the use of psychedelics and psychotherapeutics. The New Romantics are open-minded advocates of nature-powered therapeutic substances that will lead them to their goals.

As the psychedelic wave snowballs into a science-backed and socially acceptable market, these travellers are seeking new ways to alter their mood or expand their consciousness, ranging from shaman-led ayahuasca retreats to the considered use of legal CBD and THC products. Local laws will of course dictate consumption, but research and investment are picking up and some therapies are already legal and available in certain regions.

Dr Blecher confirms that Soneva is looking into the possibility of offering psychedelic medicine at its resorts while carefully investigating its safety and efficacy and keeping abreast of legal developments in the region. “We are working on a collaboration with Chiang Mai University on CBD and cannabis products for use in our massage and beauty treatments and for medicinal use in Thailand,” she says. “And our upcoming SOUL Festival at Soneva Fushi, which takes place between 29 September and 8 October, will feature experts in the psychedelic field.”

Checklist New Romantic

- Emotional hygiene retreats
- Spiritual sanctuaries
- Daily awe walks
- Sensorial moments
- Safe psychedelics





Future travel consumer profile 02

The Epicurean Adventurers

Applying the intentional living movement to a gastronomic setting, **the Epicurean Adventurers want to make every moment – and every meal – matter.** Enjoying once-in-a-lifetime dining experiences and the discovery of new flavours, especially the authentic cuisine of different cultures, is of paramount importance to these novelty-seeking travellers. They are drawn to the experimental and the unexpected and want to expand their world through food.

Food frontiers

Bold and open-minded, the Epicurean Adventurers crave thrilling, high-sensorial moments. In their quest for daily awe through culinary experiences, they are always on the lookout for drinking and dining offerings that evoke a sense of adventure, not just in the food itself, but also the setting and the way it is delivered.

These travellers seek out game-changing chefs who are breaking new gastronomical ground. They value being the first among their peers to discover new cuisine and will travel specifically to destinations that deliver something genuinely novel or have a fascinating food story to tell.

“Ever since we opened Soneva Fushi back in 1995, guests who have stayed with Soneva have enjoyed authentic cuisine from the many different culinary cultures that we offer,” says Damien Le Bihan, director of culinary services, food and beverage, Soneva Fushi. “But equally, more and more of them are looking to try new and memorable dining experiences.”

Combining fine dining with the adrenaline rush of ziplining through the jungle, Flying Sauces at Soneva Fushi sets a high bar when it comes to memorable dining experiences. Guests follow a 200-metre zipline trail to an open kitchen and treetop platform perched 12 metres above the ground, where they are served a gourmet meal in the midst of the leafy rainforest canopy.

Guests can also enjoy intimate dining experiences with Michelin-starred visiting chefs. Over the years, the Soneva Stars calendar has welcomed Noma co-founder Claus Meyer and former head chef Mads Refslund, leading German chef Tim Raue, sushi master Kenji Gyoten, and the UK's Tom Aikens, among others.



“ We have reduced our beef consumption by 70%. This helps to improve the welfare of animals, slow down climate change, and improve our health”

Damien Le Bihan, *director of culinary services, food & beverage, Soneva Fushi*

Epicurean Adventurers are also passionate about immersing themselves in global or rediscovered cuisines. Innovation is important to them, whether it is in new ingredients, rediscovered indigenous foods or trailblazing fusions, such as Soneva Kiri's Colours of the Garden, a dining experience that combines Mexican and Thai cuisine, followed by a Medicinal Mixology class and stargazing. “At Soneva,” says Le Bihan, “our goal is to provide new experiences while keeping the authenticity of the cooking. We want the guests to be able to travel to different countries in the world without having to leave the island.”

Wellness on a plate

Rejecting hustle culture, the Epicurean Adventurers prioritise care for themselves and the planet through their food choices. They celebrate cuisine that draws on ancient wisdom and are equally enthralled by the growing body of knowledge concerning natural connections that now inform food products and wellness solutions, including mycelium, the biodynamic farming of grapes for natural wines, and the importance of the microbiome.

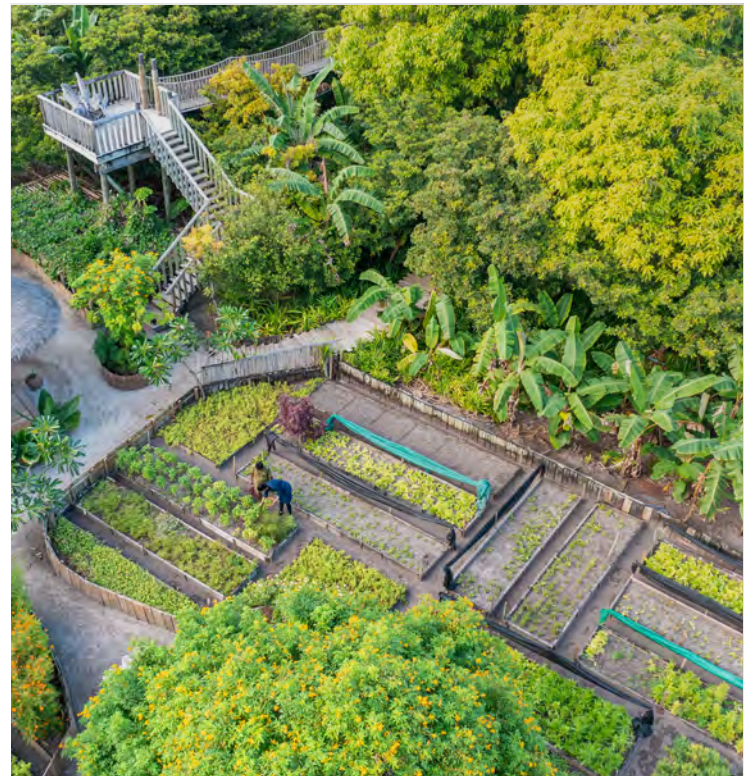
Throughout Soneva, there is a focus on healthy, nutritious cuisine with a plant-based emphasis. “As well as a dedicated plant-based dining destination in every Soneva resort, we also have an extensive offering of plant-based and vegetarian dishes across all of our menus,” says Le Bihan. “On average, 30% of our dishes are plant-based or vegetarian. In recent years, because the production of livestock for human consumption is recognised as a major contributor to greenhouse gas emissions, we have also made a conscious decision to minimise the consumption of beef at our resorts: there are no beef items included in our buffets or set menus, and beef can only be ordered by special request. Since starting this initiative, we have reduced our beef consumption by 70%. This helps to improve the welfare of animals, slow climate change, and improve health.”

Natural goodness

Just as the New Romantics seek immersion in nature as a form of therapy, the Epicurean Adventurers consider nature with every bite. They are passionate believers in sustainable, organic ingredients that nourish the body and mind, and have a positive impact on the planet.

At Soneva Jani, So Wild offers plant-based dishes designed by the innovative raw food chef Diana Von Cranach. The menu revives historical, almost-forgotten traditional recipes from the Indonesian Spice Islands and Southeast Asia. 90% of the produce used is freshly picked from Soneva Jani's organic garden and most dishes are raw, with some incorporating unusual ingredients as well as healing herbs and botanicals.

Recognising the need for sustainable produce and nature-forward cuisine, Soneva has introduced organic gardens in all its resorts. "Food grown without the use of toxic fertilisers is crucial for soil health – as well as that of our guests," says Ritu Mathur, area permaculturist, Soneva Fushi and Soneva Jani. "Each of our resorts has edible gardens nurtured with compost created from food waste. Not only does this mean our ingredients go from farm to fork in a matter of hours, but it also removes the carbon emissions that would result from importing them."



Checklist Epicurean Adventurers

- High-sensorial moments
- Dining with intent
- Indigenous food experiences
- Holistic wellness
- Nature-forward cuisine

A photograph of a man and a young child on a beach swing set. The man, shirtless and wearing blue patterned shorts, is on the left swing, looking back over his shoulder. The child, wearing a blue life vest and red shorts, is on the right swing, facing away from the camera. They are on a sandy beach with the ocean in the background under a soft, hazy sky.

Future travel consumer profile 03

The Global Citizens

With the boundary between work life and home life increasingly blurred, the Global Citizens see the world as theirs to explore. Like the digital nomads who rose to prominence over the past 20 years, these individuals can work anywhere they choose, assuming there's a reliable wifi connection. The big difference is, **Global Citizens have families, possessions and a need for stability** that might once have been at odds with their wanderlust. **They are an affluent evolution of digital nomads – older, wiser, and equipped with the technology, the desire and the resources to establish family life in multiple locations across the globe.**

International school

One of the most widely recognised impacts of the Covid-19 pandemic has been the acceptance of remote working, but the influence of lockdowns on education has been similarly profound. According to the World Economic Forum, more than 1.2 billion children around the globe had their schooling disrupted by the pandemic, and as a result, “education has changed dramatically, with the distinctive rise of e-learning, whereby teaching is undertaken remotely and on digital platforms”.

This shift has led to the rapid growth of edtech platforms such as Educate Online, which grew by 550% in 2020, and Bangalore-based Byju's, which has over 115 million registered students. A recent Forbes article predicted that by 2025 the edtech market will be worth \$404bn. Even elite establishments are going digital: in 2020, Harrow School launched an online sixth form enabling students aged 16 and above to access an education from one of the UK's most prestigious private schools from anywhere in the world.

The consolidation of both remote working and home schooling will give rise to growing numbers of Global Citizens who move between a number of locations throughout the year. With showing your face in the office and getting back for the first day of school no longer essential, these individuals and families have the freedom to extend their stay for as long as they like. And while digital nomads were techies and freelancers, Global Citizens – dubbed “fauxmads” in a recent Sunday Times Style article – might be successful entrepreneurs or the CEOs of major companies.



“ The Maldives recently allowed villa owners to benefit from a five-year corporate residence visa”

Justin Kingsley, group director,
Soneva Villa Ownership

Return on life

While business trips usually last a few days or weeks, bleisure travellers look to plan stays of multiple months. For affluent Global Citizens, buying a property you can return to for longer periods will become an increasingly attractive and financially savvy option.

In 2011, Soneva became the first and only company to offer luxury real estate for sale in the Maldives to foreign buyers. With the Soneva Villa Ownership scheme – also known as “Return on Life” – guests who fall in love with the Soneva lifestyle can create a bespoke home-away-from-home, with the option of offsetting residential expenses with rental income while absent. “Our villa ownership programme has always attracted Global Citizens, and this is a continuing trend,” says Justin Kingsley, group director, Soneva Villa Ownership. “For many, the Soneva villa is part of a large portfolio of international homes.”



Currently, most owners use their home in the Maldives for between 60 and 90 days each year. However, Soneva is seeing a new pattern developing, with a marked increase in owner usage since the pandemic. “The Maldives was one of the first tourist destinations to reopen its borders following lockdown,” says Kingsley, “and many owners chose to ride out the restrictions in their villa. This trend has continued as we return to normal. The Maldives recently allowed villa owners to benefit from a five-year corporate residence visa. This, coupled with the excellent internet connections available, has given owners the opportunity to work and learn from their villa.”

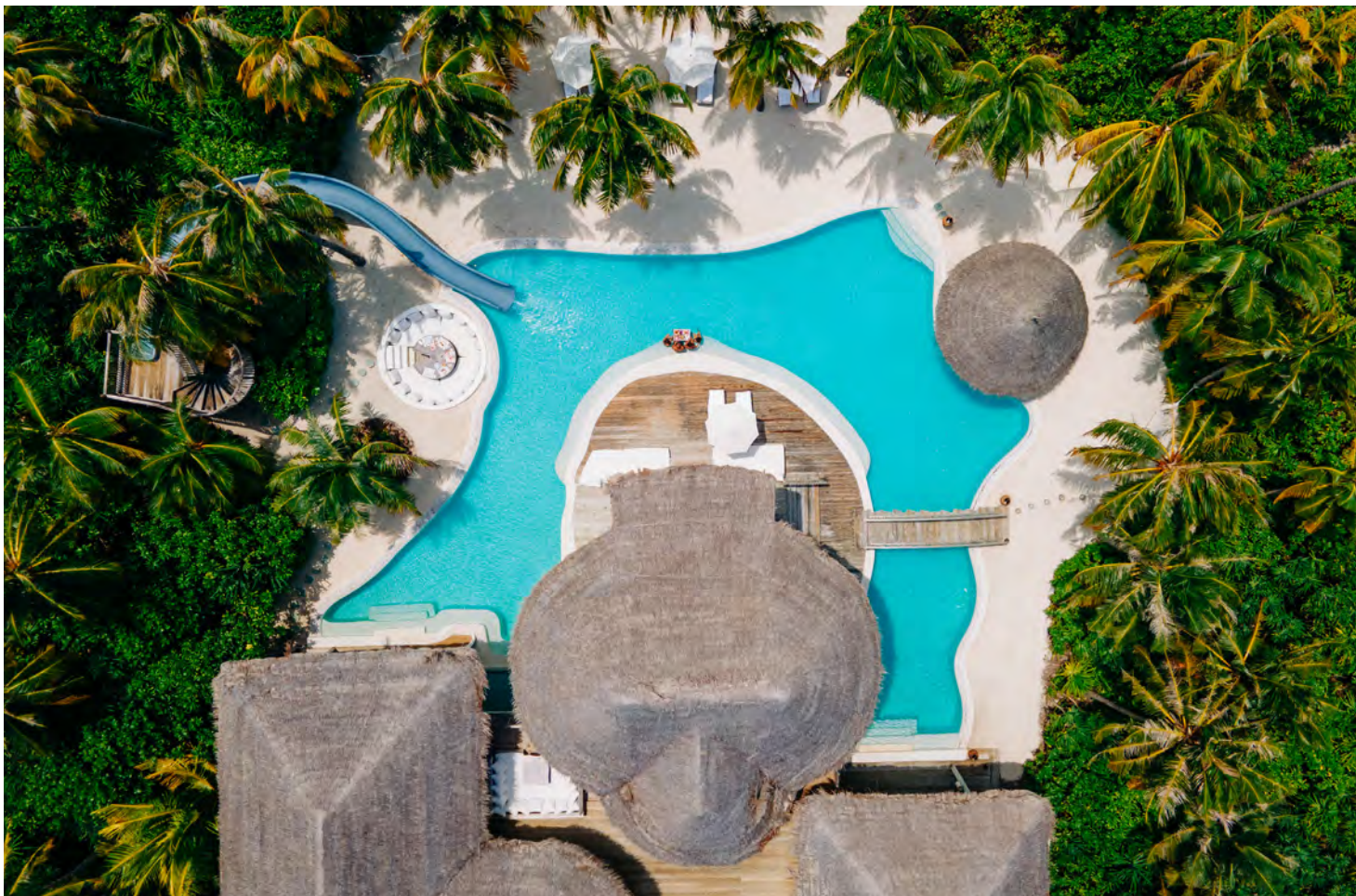
Alternative payment methods

Cultural shifts coupled with advances in technology are altering not just the way we travel – and the length of our stay – but how we pay. In January 2022, when Airbnb CEO Brian Chesky asked Twitter what the company should launch that year, the majority of respondents said crypto payments. This poll aligns with the results of another survey, which found that 22% of American travellers want to pay with cryptocurrency.

Cryptocurrency payments are becoming increasingly popular among travellers across the world, with the global crypto market projected to reach \$4.94bn by 2030. The rise of the crypto market will see consumers increasingly demanding more payment options for all types of consumer goods and experiences. Since August 2022, Soneva has accepted Bitcoin and Ethereum payments at its resorts in the Maldives and Thailand. Both cryptocurrencies can also be used for Soneva Villa Ownership.

Checklist Global Citizens

- Remote learning
- Extended stays
- The rise of bleisure
- Nomadic family life
- Embracing cryptocurrency





Future travel consumer profile 04

The Wisdom Seekers

For these travellers, lifelong learning is the route to lasting satisfaction. Their goal is to return from a holiday armed with new wisdom, whether it relates to sustainability, meaningful engagement with indigenous cultures, culinary skills or new wellness practices. **Travel, for the Wisdom Seekers, is not just about relaxation and sybaritic pleasure, but the pursuit of knowledge and self-improvement.**

Yearning for learning

“I find that most of our guests have shown an increasing thirst for knowledge and learning,” says Shivdasani. “They want meaning, authenticity, and connection. They crave conviction, experiences, focus and depth, discovery and understanding. When guests come to stay with us at Soneva, we don’t want them to do the same thing they do at home – we want them to escape, to dream, to feel.”

For many consumers, “transformative travel” has become a key aspiration, and in 2023 and 2024 the Wisdom Seekers will be searching for experiences that expand their minds and deliver a real sense of purpose. Like much of our contemporary cultural mindset, the seeds of this shift were planted during the pandemic, when the ritualistic process of undertaking simple, honest pastimes became an important wellbeing practice. According to a report in *The Independent*, one third of UK residents took up a new hobby during 2020/21, with gardening and growing fruit and vegetables among the top activities.

With HNW travellers taking ever-longer vacations (see *The Global Citizens*), Wisdom Seeker families are also drawn to activities that support their children’s learning. Edu-travel is growing in popularity, with luxury tour operators launching educational experiences aimed at young travellers. The Soneva Academy, for example, offers educational courses for children and teenagers covering a range of fascinating environmental topics, with a focus on life below water, life on land, the stars in the sky, plastic pollution and lifelong learning programmes.

Soneva also owns some of the largest telescopes in the regions where it operates, so guests can visit an on-site observatory and learn about the stars.

“At Soneva, we are rich with learning experiences, whether it is at our observatory, learning to free dive, or snorkelling with our marine biologist,” says Shivdasani. “There are also learning opportunities from interesting visitors, whether it is an astronomer, glass artist, a world champion free diver, a famous author, a Michelin-starred chef, a winemaker, or a Grand Slam tennis champion like Jonas Björkman.”



Healthy body, healthy mind

Health and wellness have moved further up the list of priorities for post-pandemic consumers, with travellers increasingly seeing their vacation as a means of discovering and experiencing new medical and self-care practices.

Travel and health are closely intertwined for the Wisdom Seekers. They are receptive to innovative forms of treatment, and view travel as a pathway to looking and feeling better. Wisdom Seekers are particularly drawn to ancient therapies and “medi-luxe” facilities – high-end resorts that have amplified their health and wellness services to focus on immunity-boosting and preventative healthcare.

“Following the impact of the Covid-19 pandemic, a focus on wellness and healthier lifestyles has never been more important,” says Dr Blecher. Launched in 2021, Soneva Soul is a transformative wellness brand that combines modern medicine with thousands of years of healing wisdom. As Dr Blecher explains: “Our treatment menu unites apparent opposites: ancient and modern, East and West, tradition and science. It features Ayurveda, herbalism, medicinal mushrooms and traditional Chinese medicine alongside cutting-edge treatment methodologies such as ozone, vitamin IV, hyperbaric oxygen and floatation therapies.”

Soneva and Organic India have also partnered to launch the first-ever SOUL Festival in the Maldives. The festival features experts from across the wellness spectrum to bring together a vision of healthcare that includes everything that traditional and modern medicines have to offer. Over the course of 10 days and two weekends, the intimate festival retreat invites guests from across the world to explore wellness in all its forms.

“ At our wellness centre, the treatment menu unites apparent opposites: ancient and modern, East and West, tradition and science”

Dr Lilly-Marie Blecher,
chief science and medical officer, Soneva

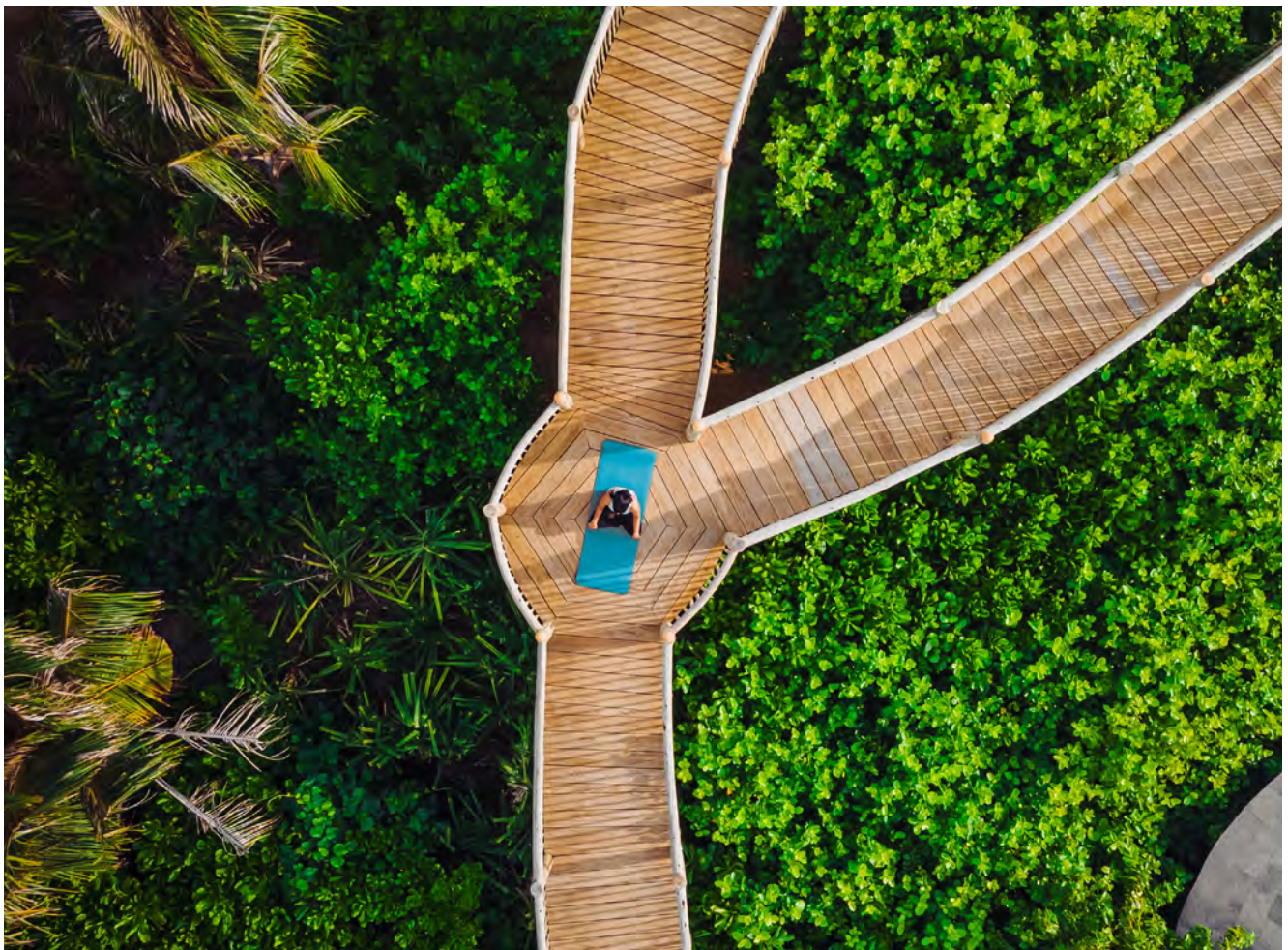
Emotional hospitality

The Wisdom Seekers are also gravitating towards holidays that heal on an emotional level. According to American Express, 78% of US respondents indicated that travelling to relieve stress was their biggest driver in 2021. Over the next few years, luxury hospitality will be shaped by meeting the demand for emotional recalibration, something the Wisdom Seekers will embrace.

In certain cases, however, they will demand an approach to wellness that goes beyond mere relaxation. They will be drawn to destinations that offer transformative wellness experiences focused on releasing trauma and eliciting happiness. At its most extreme, the new 'emotional hospitality' will encompass experiences that directly address the burgeoning mental health crisis, providing space for intensive emotional rehabilitation – from cathartic screaming therapy to deep spiritual healing sessions.

Checklist Wisdom Seekers

- Transformative travel
- Slow wellness
- Edu-travel
- Silent stays
- Emotional recalibration



An underwater photograph showing two divers swimming towards the camera. The diver on the left is a woman with dark hair, wearing a black mask and a dark swimsuit. The diver on the right is a man with a beard, wearing a black mask and a dark swimsuit. They are surrounded by many small, striped fish. The water is clear and blue.

Future travel consumer profile 05

The Virtuous Voyagers

The Virtuous Voyagers see travel as a privilege and seek out hospitality experiences with authenticity, adventure, purpose and integrity.

Before setting out on any journey, these enlightened travellers need to be certain they will be imposing the minimum negative impact on their destination – or, better still, leaving a positive, regenerative legacy. Rather than taking things at face value, they are prepared to do their research to gauge how their hosts tackle these challenges and mitigate negative impacts.

Sustainable luxury

Since its launch, Soneva has been at the forefront of the Maldives' effort to create a more sustainable future in the face of climate change. "I've always loved combining concepts that were considered mutually exclusive," says Shivdasani. "Take, for example, sustainability, wellness and luxury. People would historically say, 'Well, if it's sustainable, it's not luxurious,' or 'If it's luxurious, it's not good for you.' At Soneva, luxury, wellness and sustainability go hand in hand. They feed off each other. Eva and I have always believed that luxury is defined as something that is rare or uncommon for the consumer, something that strikes a chord in one's heart when it is experienced. Sustainability and wellness are hallmarks of something that our guests rarely experience in their cities. It is rare to enjoy oneself while doing something positive for the environment."

The not-for-profit Soneva Foundation was set up to address the direct and indirect environmental impacts of Soneva's resorts. A 2% environmental levy is added to all guest stays, which the Soneva Foundation invests in a host of global projects that have a positive environmental, social and economic impact reaching far beyond the shores of each Soneva resort.

Projects implemented by the Soneva Foundation will mitigate around 1m tonnes of CO2 over their lifetime and have improved the lives of 300,000 people. In addition, over 750,000 people worldwide have received access to safe drinking water and basic sanitation services from clean water projects supported by the Soneva Foundation. The foundation has also planted 500,000 trees in Thailand and 900,000 trees in Mozambique, in partnership with Patt Foundation and Eden Reforestation projects respectively. The commitment in Mozambique is to plant 3.7m trees in total by 2025, by which 3,300 ha will be restored. The Soneva Foundation has also planted 350,000m mangroves in Myanmar in partnership with Worldview Foundation, which will restore 600 ha.

Heightened consciousness

In National Geographic's The expert guide to travelling more sustainably in 2022, regenerative travel expert Richard Hammond writes, "Being a green traveller today is no longer limited to one-off gestures but, rather, it's a state of mind. An ongoing attitude to conscious adventure, it now influences all aspects of our travels, from what we pack and how we reach our destination to where we stay and the activities we take part in."

This chimes with the values of the Virtuous Voyagers, who are keen supporters of what Hammond calls "positive impact adventures", which help with "biodiversity conservation, safeguard the local landscape and meaningfully contribute to local economic empowerment and global justice".

Nature-forward initiatives

Ultimately, the Virtuous Voyager's most important role lies in choosing the type of hotel, resort or travel operator they wish to give their money to. They are prepared to get behind nature-first businesses that conserve biodiversity and safeguard precious ecosystems. In 2019, for example, Soneva's Mosquito Project pioneered a pesticide-free solution to combat mosquitos at Soneva Fushi, developing a sustainable system of traps that mimic mosquito breeding sites

and the scent of human sweat. As a result, the mosquito population dropped by 98% in 2021. The project has since been rolled out at Soneva Jani and has been expanded to other island resorts in the Maldives.

Other priorities for progressive travel companies include investing in sustainable energy technology to repurpose waste into energy or functional products. "We now recycle 90% of the solid waste generated on the island," says Ritu Mathur of Soneva Fushi and Soneva Jani. "All the food waste is composted and used in the organic gardens. Styrofoam is converted to beans and used as insulation material in walls. Cans are melted and transformed into practical pieces and artworks at the Makers' Place. We are changing the way waste is handled in the Maldives – essentially demonstrating that old adage about one man's trash being another's treasure."

Initiatives like this are met favourably by Soneva's guests, who are increasingly expressing concern about reducing the environmental impact of their stays. "When they learn about the waste issues of the Maldives, they begin to understand the importance of responsible consumption and waste management," says Katarzyna Izydorczyk, director of Soneva Namoon operations and community engagement. "Guests appreciate not seeing plastic items anywhere in sight around the resorts and enjoy the back to nature experience – especially the various experiences for children and young people that inspire and nurture environmental stewardship."

"It always inspires me to see how our guests change while they're with us," says Shivdasani. "This may sound like a naïve message coming from an island in the middle of the Indian Ocean, accessible only to a handful of travellers, but we see it as an awareness-building experience. We want people to recognise the necessity of repairing the damage that we have caused to the environment – the energy we consume or the water that we take for granted. The hospitality industry can make a huge impact by getting this message across."

Cultural custodians

The Virtuous Voyagers see their destination as much more than somewhere to fly and flop. They are interested in its food, art, history and music, and strive to immerse themselves in the indigenous culture. Like the Epicurean Adventurers, they aspire to being citizens of the world through the discovery of foods from every corner of the globe, where local ingredients, traditional recipes and unique dishes help to define culture.

According to Booking.com, 68% of travellers want to have authentic experiences that are representative of the local cultures. The Virtuous Voyagers in particular understand that they have a huge amount to learn from local communities. In the coming years, hotels and resorts will be seen as cultural custodians and will increasingly explore opportunities around partnership with local communities to integrate their wisdom into their strategies and operations.

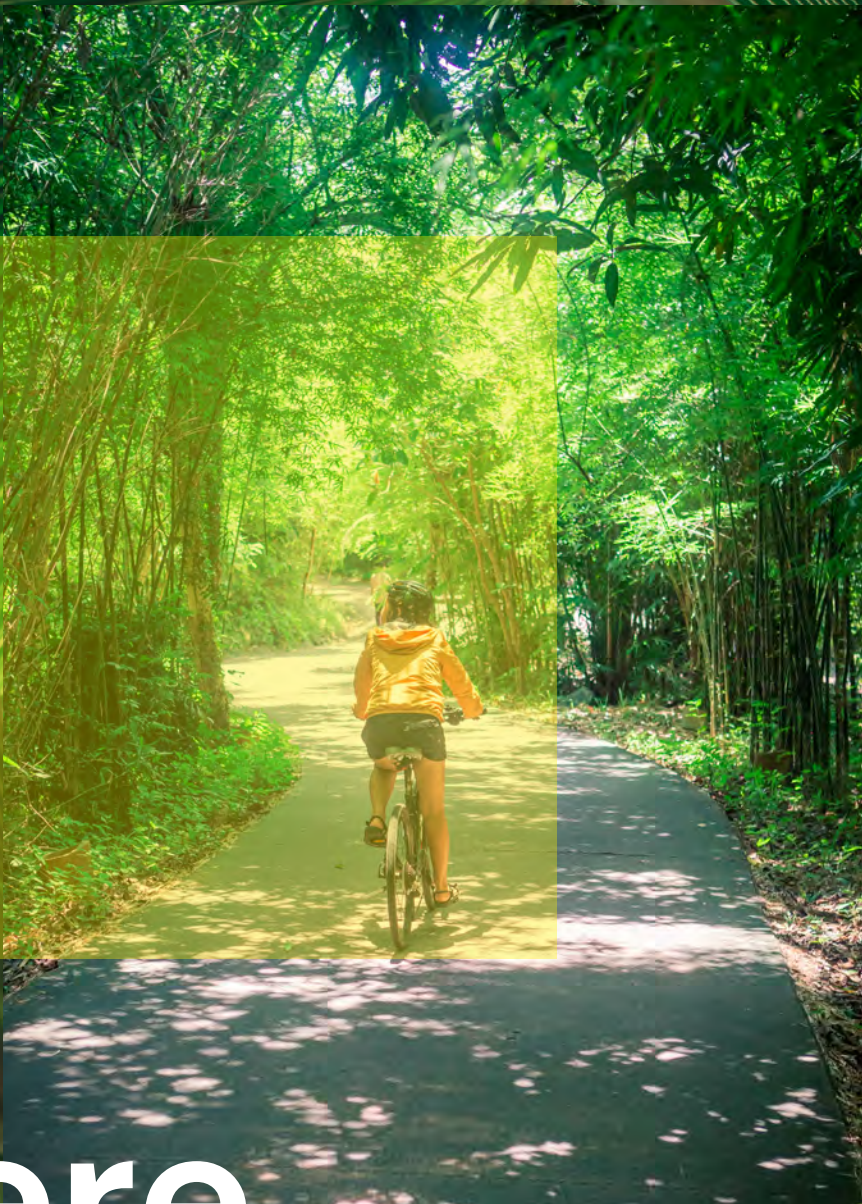
“Our guests appreciate not seeing plastic items anywhere in sight around the resorts”

Katarzyna Izydorczyk, *director of Soneva Namoonaa operations and community engagement*



Checklist Virtuous Voyagers

- Authentic ancestral experiences
- Regenerative tourism
- Positive impact adventures
- Mindful luxury
- Cultural custodians



Conclusion

Where
to now?

What consumers will demand from travel over the next two to three years

Since 2020, travel has experienced an epiphany. The industry was rocked by the pandemic, but after an enforced period of reflection, **it now has the opportunity to build back better and stronger.**

Does that mean bigger and brasher?
Almost certainly not.

Over the next two to three years, travel – especially luxury travel – will become less about status and grandeur and more about sensitivity.

This applies both to consumers, more conscious than ever of the potential harm their annual vacation could cause, but also the hoteliers and operators who are responding to the concerns of a more thoughtful and questioning post-pandemic guest.

Tomorrow's travellers will feel a growing desire to engage with and learn about the communities they're visiting. They will hope to experience humbling moments of awe through encounters with nature. And yet, conversely, they will embrace almost narcissistic self-care. Travel will be called upon to provide not just relaxation and stress-relief, nor even hedonism, but a chance to heal and recalibrate. Armed with these needs and preoccupations, tomorrow's traveller will have in mind six key elements when choosing where to spend their money and their time...

01

Adventure

Whether it's through exciting new food experiences, active pursuits or meaningful human interaction, travellers will seek moments of awe and wonder to ground and inspire them.

02

Nature

The great outdoors will take centre stage as travellers pursue new ways to immerse themselves in the natural world – shown not just to delight but to heal and enhance.

03

Health

Emotional and physical self-care will be prioritised, with travel – and the exploration of new therapies and safe psychedelics – offering a way to counteract the woes of the pandemic.

04

Authenticity

Gone are the days when tourists were content to discover little about their destination. Tomorrow's traveller will seek experiences that respect local cultures and communities.

05

Responsibility

Deeply troubled by the climate crisis and global inequality, the tourists of the future will demand not just sustainability but regenerative travel that leaves a positive legacy.

06

Intent

Ever more mindful since the dark days of the pandemic, travellers will journey with intent, aspiring to gain wisdom, cherish daily pleasures and make every moment count.



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