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A futurist's thoughts on consumer trends shaping future festivals and events

Ian Yeoman
Victoria Business School, Victoria University of Wellington, Wellington, New Zealand

Abstract

Purpose – In order to understand the future of organised events and festivals it is necessary to understand the patterns of change associated with their consumption. This viewpoint paper identifies ten significant consumer trends derived from global omnibus data as key social forces likely to affect the behaviours and actions of future festival and event goers.

Design/methodology/approach – The trends data has been sourced from http://nvision.futurefoundation.net/, an online consumer omnibus survey of households worldwide.

Findings – The author identifies ten trends of significant importance which represent the present and future behaviour's of festival and event goers.

Originality/value – Derived from this viewpoint, an enhanced understanding of what the future could be, and the forces influencing it, provides festival and event organisers with the potential to shape that future. This paper identifies trends of significance in order to inform future decision making.

Keywords Trends analysis, Future, Consumer trends, Festivals and events, Consumer behaviour, Decision making

Paper type Viewpoint

The world of festivals and events

Festivals and events as a global phenomenon has evolved and developed in the twenty-first century (Allen *et al.*, 2008). This rapid growth, coupled with increased consumer awareness, has seen widespread performance of festivals and events, whether it be spectacles like the Edinburgh International Arts Festival, the Whole Enchilada Festival in Las Cruces or the New Zealand Rugby World Cup, respectively. Many festivals and events are at the mature stage of their life cycle whereas others are at an embryonic stage. On a global level, at an international and national level, in cities and towns, villages and hamlets, in rural and coastal areas there is an unprecedented interest in festivals and events (Yeoman, 2008). Tourists are travelling more frequently to corners of the earth previously rarely visited. They are becoming more sophisticated and, concomitantly, more interested in different cultures. Furthermore, local people want to celebrate their particular form of culture, tradition, difference or, perhaps, eccentricity. Festivals and events promote destinations, and political leaders have formulated destination plans based upon event calendars as a driver for tourist visitation. Worldwide, consumers are spending more of their disposable income on travel and culture; and it is proposed here that the living or the creative cultural sector rather than the museum and heritage sector that is benefitting. It is no longer limited to "high brow" performing arts or to

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a "low brow" comedy circuit. It is thus increasingly "no brow", as consumers are comfortable with a diversity of experiences, whether it be a attendance at the Opera, or something a little (or a lot) more unusual. Today, festivals and events are very much part of the experience economy and everyday leisure consumption (Yeoman, 2008).

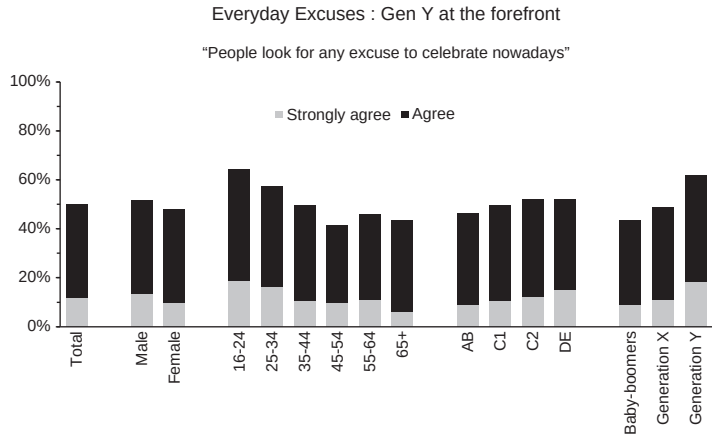
Trend analysis

One way to look at the future is to understand the patterns of trends, called trends analysis (Yeoman, 2008). This is a useful way for providing insight as to how the world is performing now, and to illicit foresight as to what is coming next. This is done through an examination of the causes, assessment of the speed of developments and consideration of the impact they may have. For example, how does an ageing society impact on the future of events? One outcome from this consideration may be a discussion of how the Baby Boomers could dominate wealth patterns and how their distribution of income will drive the growth of heritage rock festivals. So, first, what are the top ten consumer trends which will shape the future of festivals and events?

The top ten consumer trends

Trend 1: everyday exceptional

There seems to be a natural increase in the number of occasions human beings choose to celebrate. At one time, steak dinners, party hats and bottles of champagne were the odd treat, reserved for certain special and perhaps extraordinary moments. But now, not only does each new season bring cause to celebrate but one can now find an excuse every month, week or day to buy that new outfit, to be merry and to indulge in new ways. Under the modern forces of globalisation, there are now a number of national and religious holidays people can choose to celebrate. Ours is a constantly embracing culture, in which there are simply ever more prompts to treat the day differently and to accept new forms and activities. The result has been the transformation of the everyday into the exceptional. Figure 1 identifies Generation Y as the cornerstone of this trend, with 60 per cent them most likely to find an excuse to celebrate. Why? While the Global Financial Crisis has clearly had an impact (Claessens *et al.*, 2010;



Source: nVision Research | Base: 5,000 online respondents aged 16+, GB, 2012

Figure 1.
Everyday excuses

Lyck *et al.*, 2012) fundamentally societies are growing wealthier, and certain overlapping motives release special energy: the need for organised fun/the search for reasons to interact informally with others through the pursuit of endorsed cultural identity. It is Generation Y, 30 plus years of age, and with wealth, who have formed into urban tribes (Ethan, 2004). For this generation, sporting events are a justification for celebration – often a party not for the sport fanatic but for the party lover. The game, race, match may, in fact, become secondary to the social gathering it spurs. So is the Kentucky Derby a fashion show or a horse race? The Monaco Grand Prix for soaking up engine fumes or lapping up luxury? Is Wimbledon really a time for tennis or is it "Pimms O'clock"? (Future Foundation, 2013a).

Trend 2: magic nostalgia

For consumers in many developed markets (Yeoman, 2008), the past holds such potent appeal that it evokes on one hand a warm sense of nostalgia and, on the other, a feeling that modern society is in decline. Driven by the idea that yesteryear was somehow a better and altogether more inviting place, consumers are willing – rightly or wrongly – to believe that community ties used to be stronger, that the air we breathed was cleaner, and that our everyday pleasures were simpler. Yet this (often deeply rooted) fondness for the past also allows once-prominent products and programmes to be reintroduced, and long-faded fashions revitalised and former glories revived. Heritage becomes a hallmark of quality.

This trend of magic nostalgia is observed through the vintage at Goodwood festival (www.vintageatgoodwood.com), which is an event designed to celebrate British music, film, fashion, art, design and dance from the 1940s onwards. Held in the Sussex countryside over three days in 2010, it is positioned as "the British holiday of choice for the culturally aware" and includes a specially created "pop up" High Street complete with a "vintage marketplace" and a recreation of Oxfam's original 1948 store. Subsequently, the organisers decided to focus on two separate aspects for future festivals, and created two separate event experiences to replace the original Goodwood festival. One of these, the Goodwood revival is marketed as "a magical step back in time, a unique chance to revel in the glamour and allure of motor racing in the romantic time capsule of the golden era of motor racing at one of the world's most authentic circuits" (www.goodwood.co.uk/revival/welcome.aspx).

Trend 3: the leisure upgrade

From a global perspective, the culture of spending long hours at work dictates that people will allocate much of their free time to passive activities that enable them to recuperate from daily stresses and burdens. Poverty equals fatigue for millions of workers across the globe while many middle class people, current or aspirant, are dedicated to personal career building and wealth accumulation as life's principal priority. Downtime, conversely, is crucial to personal survival in these circumstances. As Figure 2 identifies, aspiration for leisure activities increases with greater affluence. Hence, leisure tastes evolve to encompass rather more sophisticated and impressive demands. More consumers want to lead active, varied lives away from work, lives that can respond to their every interest, instinct and indulgence and cast them in the very best light in front of friends, families and networks alike (Felitti and Fiore, 2012). Participation in live events become more important as their relation to social capital becomes increasingly profound. Experiences that are able to boost cultural knowledge and parade personal achievement to the outside world are growing in appeal. Accordingly it has becomes less and less fashionable to broadcast the fact that one's personal entertainment options are focused on simple,

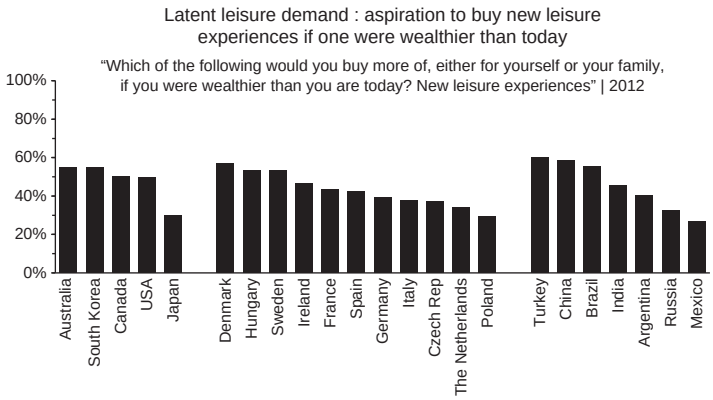


Figure 2.
Leisure demand

Source: nVision Research | Base: 1,000-5,000 online respondents per country aged 16-64 (Mexico 16-54), 2012

easy-to-access pleasures. Festivals thus offer social capital, richness and new experiences. They provide an upgrade of the leisure experience.

Trend 4: mobile living

The capabilities of mobile devices have evolved so rapidly and so explosively that the extent of what billions of global consumers can achieve while mobile appears near limitless. In both the developing and less developed areas of the world, the use of the mobile phone continues to increase exponentially, as indicated in the three year snapshot (2010-2012) in Figure 3. Fixed line telecommunication connections are being leapfrogged by mobile connectivity. Central to the trend's future trajectory is the evolution of the mobile web. A growing proportion of people – particularly so in the most developed economies – are experimenting with the mobile internet. The latest generation of smartphones and tablet devices provide convenient access to the internet and allow people to carry out virtually any kind of activity from the serious to the

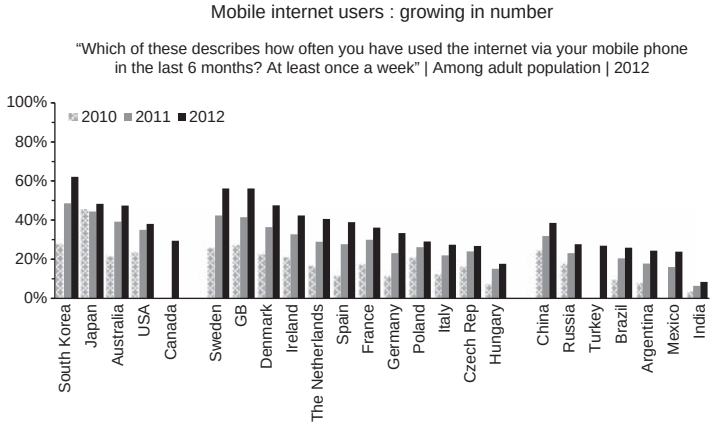


Figure 3.
Mobile internet users

Source: nVision Research | Base: All individuals per country aged 16-64 (Mexico 16-54), 2012

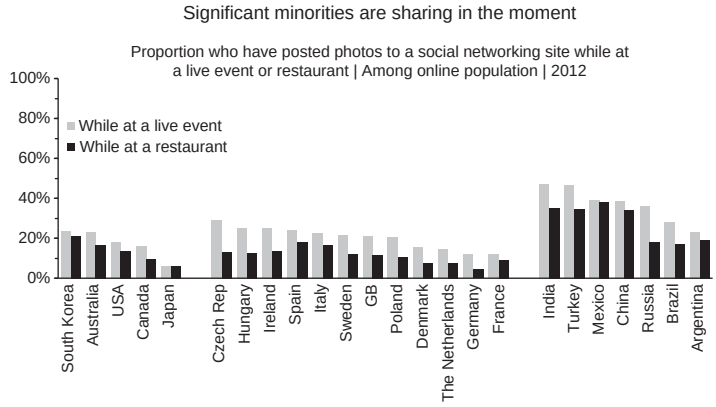
frivolous, wherever they are. Augmented reality applications that embellish the real world with real-time digital information and entertaining experiences will develop, driven by companies seeking to improve the festival and events experience and to provide users with useful information through overlay (Yeoman, 2012). For example, in late 2012, Sony organised AR Headphone Music Festivals (Future Foundation, 2013c, d) in several locations in Japan. Using Sony's 3D augmented reality technology called SmartAR, original AR videos were created in collaboration with four popular local rock groups. The videos could be accessed by scanning the AR codes on typical festival posters which were spread across popular locations in the participating cities.

Trend 5: performative leisure

If so inclined (see Figure 4), our widening access to the mobile internet has also allowed evidence to be broadcast of what we are doing in real-time – typically choosing social networks as the place to share details of our, for example, music festival experience and sporting event attendance. At present, it is the younger age groups who are most engaged with this activity. As the 2010's unfold, though, older cohorts will likely find it more attractive too (Future Foundation, 2013a). In addition, the process of proving the appeal of our leisure choice is taking a much more visual format. While mere descriptions of what they were experiencing and enjoying, via a status update or post, once satisfied millions of smartphone owners across the world, now many are using the relatively sophisticated camera and video functions on phones to broadcast their life's as visual images. Thus people are presenting to others their exceptional choices, whether these be an exquisite choice in dessert, a front-row view at a concert or a paradise holiday destination. Importantly, the editing functions of the technology also allow for the proponent to show their exceptional choices in personalised and aesthetically inviting and creative ways.

Trend 6: authentic experiences

Consumerism is fuelled by society's desire to accumulate more consumer goods, services and increasingly, experiences (see Figure 2). However, rising access to those items which were once seen as luxuries has encouraged many to place a greater focus on the pursuit of experience – whether in addition to, or in place of more material-based forms of consumption. The consumer of the 2010s decade, thus, differentiates him or



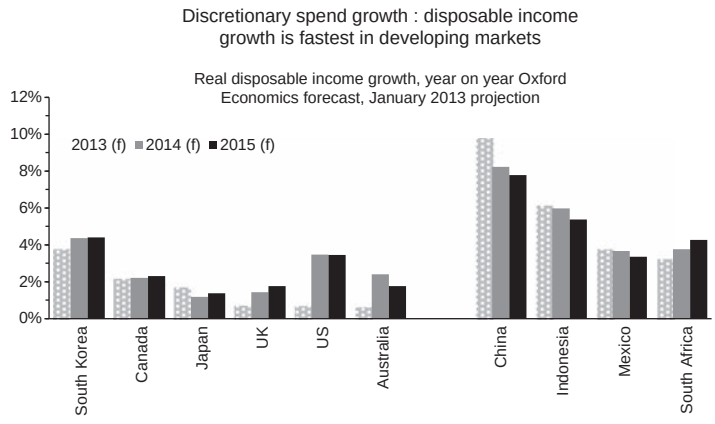
Source: nVision Research | Base: 1,000-5,000 online respondents

Figure 4.
Social media and live events

herself not only through the goods and services they buy but also by the experiences they enjoy: holidays abroad, cultural events, fine dining and cutting-edge leisure activities. This trend is known as the experience economy – the desire to enrich our daily lives by experiencing new things and to undertake activities that deliver a sense of improvement, enjoyment and refreshment (Felitti and Fiore, 2012). Indeed, festival goers will likely continue to crave nuanced, unique and refreshed experiences which help them to achieve new levels of personal accomplishment and enrichment, for example, behind the scenes tours of events, environmentally friendly festivals or lunch with the stars. They will want something personal, bespoke and unique. This process of enrichment sees the consumer search for the "real" – which is defined as authentic experiences. It is suggested here that a festival is often perceived as having an historic origin. Thus, it can be seen as holding a potentially significant level of appeal for global tourists. For example, Edinburgh International Festival (Yeoman *et al.*, 2005) is associated with authenticity and social capital, given its status as one the first major international festivals, thus an important means of differentiation from other festivals. (Yeoman, 2012).

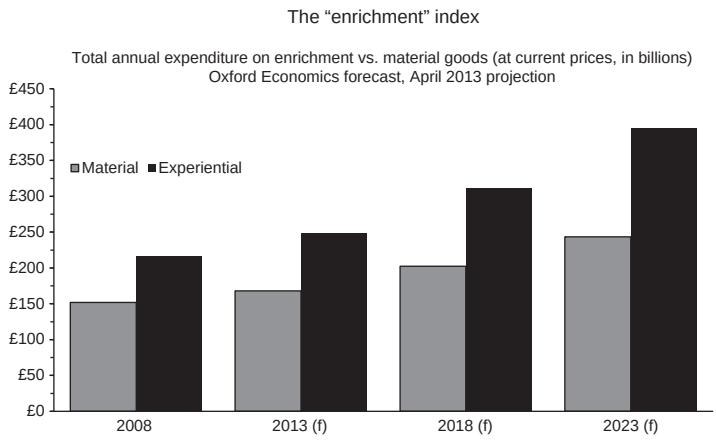
Trend 7: affluence

Rising income has been the driving agent of modern society – a key indicator of societal success and responsible for the empowerment of consumers in relation to companies, brands and governments. Increased personal prosperity creates an emboldened consumer-citizen, a more demanding, sophisticated and informed actor with intensified expectations of, for instance, quality innovation and premium choices in market type; of efficient and ever-personalised customer service; of visible corporate commitment to tackling the environmental and ethical problems of the day. Following the global economic downturn of the late 2000s and early 2010s, one might have anticipated a rebalancing of power within the consumer-company relationship as consumers in several developed markets witnessed marked declines in both spending power and in the value of key symbols of personal wealth (see Figure 5). However, it is the contention of the author that the material and psychological shock of affluence-interruption has paradoxically emboldened consumers further as Figure 6 captures. This figure forecasts consumer spending for materialistic goods as compared to



Source: Future Foundation/nVision/Oxford Economic Forecasting

Figure 5.
Discretionary income forecast



Source: Oxford Economics/nVision, UK, April (2013)

Figure 6.
Enrichment index forecast

enrichment goods/services, which will rise from UK £216 billion in 2008 to UK £395billion by 2023. Thus spending on experiences, festivals and events is forecast to remain strong as the experience economy is embedded in the consumer behaviours and values.

Trend 8: ageless society

By 2030, over 20 per cent of the world's population is projected to be over the age of 55 (United Nations, 2009). Furthermore by 2050 the median age of the respective populations of Japan, South Korea, Germany and Italy will be above 50 (Yeoman, 2012). Life expectancy varies across regions. It is higher in developed regions and continues to increase in emerging economies where rising prosperity is improving the health of citizens. These combined factors of increased longevity, compressed morbidity and an ageing global population, are impacting society's predefined perceptions of age-appropriate behaviours and choices. Consumers' understanding of what defines old age, middle years and youth are shifting. It is posited here that age is becoming less of a determinant across areas traditionally influenced by it, such as career, leisure, holidays, online activities, mobile usage, media consumption, etc. The European Social Survey (2009) identifies international variations as to "when people feel old". For example, Russians are recorded as feeling old at 64 and French at 72. Fundamentally, the higher the GDP per capita the greater the decline in the percentage of population that feels old. Furthermore, 35-45 per cent of the population in France, the Nordics, UK and Germany do not feel old in the cohort 70-75. Contemporary culture is fertile ground for older role models as festival experiences. Nowadays it is Mick Jagger, Rod Stewart and Elton John that fill stadiums as Baby Boomers flock to music festivals, determined to use their increased wealth and leisure time. As such, the concept of heritage rock has entered our discourse – as rock music becomes the classic music of our era (Bennet, 2009).

Trend 9: consuming with ethics

Many consumers today are highly sensitised to ethical issues that carry implications for company practice. This is especially the case for those that operate on a global

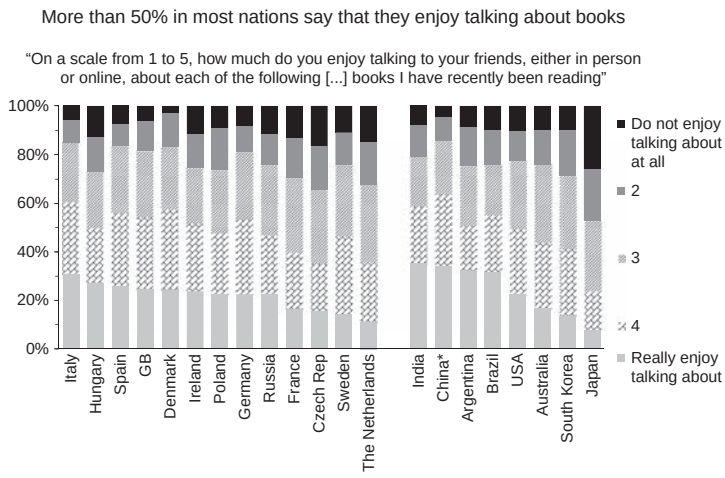
scale: pay-and-conditions for workers, energy usage and waste, resource management, gender equality, relations with charities and NGOs, product safety and recruitment of minorities. What is more, consumers have strong expectations that companies should behave responsibly before all the important social, political and environmental issues of the day. It is a basic contention that rising affluence increases consumers' power to make purchase decisions based on values other than price. Wealthier, better educated consumers desire more than mere functionality from their consumption, wishing instead to also express their personalities through what and from whom they buy. Thus, this factor impacts the level of importance that consumers' place on ethical consumption. As Professor Ben Challis (cited in Wignall, 2008) states:

> […] many music festivals are underpinned by caring and sharing principles, and make use of beautiful rural settings, leaving your festival site a ruined, sterile mess would hardly be in the spirit of the thing […] The Greener Festival Awards (which have been given to 18 UK and international festivals so far this year, on the basis of their green efforts in seven key areas such as travel and transport plans, C02 emissions and waste management) demonstrate that there is plenty of innovative practice in the festival industry. The Download festival in Derby was praised for offering carbon offsetting to the audience and distributing an artists' briefing booklet to performers, encouraging them to minimise their own carbon footprint. Latitude's initiatives included a fuel-cell powered stage and campers' waste kits given out so people could split their rubbish for compost and recycling. Scotland's T in the Park festival has been carbon neutral since 1996 and its website is especially praised for offering excellent advice. The example of Glastonbury – which sees 177,000 people sharing a site a mile and a half across – shows that even the largest event can set good green standards. It works in partnership with Greenpeace, has its own sustainability manager, promotes the "leave no trace" message, recycles almost 40% of its waste and actively innovates.

Trend 10: accumulation of social capital

Once, the purchasing aspirations of so many millions of consumers were moulded forcefully by the notion that expensive material possession + conspicuous display = social status. And so we were continuously invited to own more. So the sports car, the designer watch, the limited edition aftershave and vintage champagne could each be positioned as must-have items for the socially mobile. This proposition has been facing a significant challenge for some time now. For so many consumers, flaunting one's material possessions has lost much of the attraction it once had, that any overt display of wealth can become a hallmark of the boorish. Even in those emerging markets where consumers are invited to spend their rising incomes, a pattern is observed for experience over expenditure. Instead, it is our accomplishments and talents and wider interests which have become the new form of currency by which degrees of personal success can be measured, i.e. the things which we seek – whether with subtlety or not – and which we mention over dinner or post on our social networks.

Hence, it is the festival that you attended or the book that you have read that is strong demonstration of one's social capital (see Figure 7). The forthcoming decade will be defined strongly by the ability to accumulate social capital (Yeoman, 2008). As social networking reaches saturation point and smart phones dominate social communication, opportunities to parade one's social and cultural capital will only become more frequent. Similarly Facebook or Twitter has become vital components of our identity, representing our social capital to friends, family and the world. So, in the future, we should expect more personal portfolios of event experiences accumulated



Note: *China is 16-54, 2010

Source: nVision Research | Base: 635-3,616 online respondents who do each of the following per country aged 16-64

Figure 7.
Talking about books

over time, for example, those at Glastonbury, or food festivals in Madrid or at concert in New York.

Two concluding thoughts: What is coming next?

The importance of creative consumption

Festivals are an important expression of cultural identity and the experience economy. A tipping point has been reached. This is the moment of critical mass where advancement has changed leisure consumption (Gladwell, 2002). Consumers use smart phones and social media to showcase their views, capture moments and share experiences in real time. These technologies have become a facilitator of co-creation, thus allowing the festival and event experience to be shared with friends and families in real time. Festival and event goers now have the capacity to broadcast attendance and tell the world where they are and what they are doing, thus expanding their social connections and cultural capital. Users can generate their own content, which will then help generate and design further experience, thus shaping new adaptions and products. All of this leads to new forms of knowledge derived from, and being projected into, the festival experience. As consumers share and co-create experiences, a movement toward a more fluid identity emerges (Yeoman, 2012). Festival and event goers have the means for endless choice and creative disorder allowing them to express thoughts, writings and ideas in consumer-generated arenas. The driving forces that are creating the opportunity for fluid identity and creative consumption are rising affluence and improved access to creative activities and tools. These allow for a strong degree of individual expression, determining where and how festival (experiences) are edited, adapted and enhanced. The sense of what is real and what is fantasy will become less profound. This can be seen as driving much event and festival experience into the realms of liminality, and has capacity to be very good. Fantasy and escapism are, it is posited, the foundation of pleasure, hedonism and leisure.

As the world moves toward the year 2020, homes will become increasingly technology-rich destinations in their own right. Equipped with smart and connected

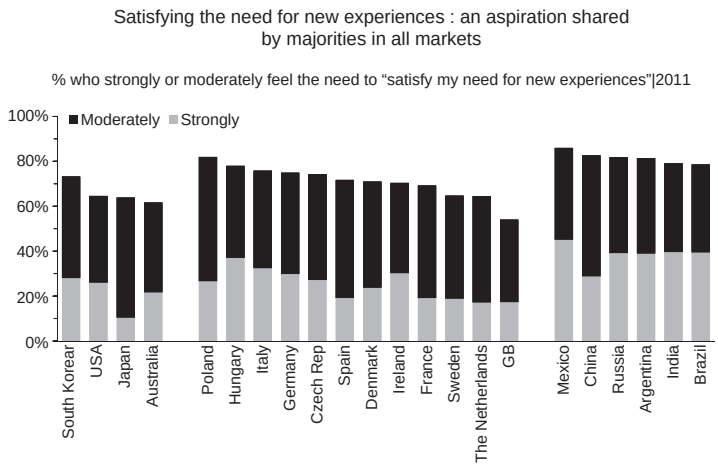
devices, they will seriously elevate the appeal of in-home hosting and socialising. What is important for the festivals and events industry is, then, how do they compete with tech-rich homes? Here, innovation and social capital are of significance as consumers look to harness their leisure time in order to accrue a greater share of status and cultural capital. The added value of festivals and events is that they allow consumers to partake in leisure activities, otherwise distinct from other forms, and gives them something to talk about or display to others. This may be about conferring higher order status, or intellectual experience, or something daringly hedonistic. Whatever the form of their experience, there is a story to share and tell. In a sense, then, the boundary between in-home and out-of-home leisure is liminal and our mobiles and tablets will become mini-leisure venues in their own right. The increased digitalisation of leisure experiences, particularly music and books will fundamentally encourage us to attach greater importance to live events. In particular, as the experience economy matures into authenticity, the further proliferation of small, local live events will grow because of a growing desire for connection and diversity in local cultural scenes. Technology is in fact a showcase, where the festival and event goer can sample Glastonbury or the Olympics before they happen.

The importance of changing consumption patterns

In the 2020s, the Baby Boomers will continue to act out fantasies at events and festivals as the trend of an ageless society takes on new meaning and new values develop. Thus, the stereotypical image of old age is no more. In turn, it can be anticipated that leisure activities once seen as the exclusive realm of under-25s will be embraced with vigour by older consumers. Hence no leisure style or accomplishment will be alien to an ageing generation which thinks that all pleasures are still very much open to them. At the same time, future festival and event goers may hail from a great range of countries. It will be the Brazilians, Russians, Indians and Chinese tourists who flock to new shores (Yeoman, 2012). These new middle class consumers will be the force that shifts consumer spending. In Asia, particularly, young populations are creating a voracious consumer force characterised by higher incomes which is fuelling consumerism. According to the OECD (Kharas, 2010), the size of the world middle class will grow from 1.8 billion in 2020 to 4.9 billion by 2030, with 85 per cent coming from Asia. In particular in China by 2015, 50 per cent of China's population will be Baby Boomers. As Morgan Stanley (Lou and Allen, 2010, p. 5) notes:

> Unlike their forebears, who lived through the civil war and a cultural revolution, this generation has enjoyed a stable political environment and enjoyed firsthand the success of China's open-door policy to other cultures and lifestyles. Second, China's baby boomers are more financially secure than were past generations, having benefited from education and prosperous job markets.

The importance of consumerism in China is of future significance (Li and Woetzel, 2012; Zhu, 2012) with 37 per cent of annual household spending in 2005 on food compared to 25 per cent in 2012. This significance highlights the shifts in consumer spending from essentials to discretionary items such as entertainment and leisure. Li and Woetzel (2012) predict that the beneficiaries of this shift will be travel, leisure and beauty treatments. In addition, Figure 6 highlights that Chinese consumers report a stronger desire for new experiences compared to other countries. Combining this knowledge with evidence from Figure 4, which depicted that 37 per cent of Chinese consumers are sharing photos at events compared to the world average of 25 per cent, highlights that the trend toward performative leisure is central Chinese consumer



Source: nVision Research | Base: 1,000-5,000 online respondents per country aged 16-64 (Mexico 16-54), September 2011

Figure 8.
The desire for new experiences

behaviour. China is on course to be first country to get old before it gets rich, due to the one child policy. The percentage of those over 65 is set to double by 2030 (Li and Woetzel, 2012) reinforcing the trend of an ageless society (Figure 8).

Thus, as wealth increases, spending shifts away from necessities and more toward discretionary items in which festivals and events will form an important part. All of the trends discussed in this paper, from magic nostalgia to mobile living, will in some way shape the design and consumption of festivals and events in the future.

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About the author

Dr Ian Yeoman is an Associate Professor of Tourism Futures at Victoria University of Wellington and a Visiting Professor and Lector at the European Tourism Futures Institute. Ian is author of numerous publications on scenario planning and tourism futures including *2050: Tomorrows Tourism* (Channelview, 2012); *Family Tourism* (Channelview, 2012); *Tomorrows Tourist* (Elsevier, 2008) and *Tourism and Demography* (Goodfellows, 2010). For further details visit www.tomorrowstourist.com or follow @tomorrowstouris on Twitter. Dr Ian Yeoman can be contacted at: ian.yeoman@vuw.ac.nz

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